Oracle® iSetup

User Guide

Release 11*i*

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Oracle iSetup User Guide, Release 11*i*

Part No. B10695-02

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Oracle iSetup User Guide, Release 11*i*

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Preface

Welcome to the Oracle iSetup User Guide, Release 11*i*.

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

- The principles and customary practices of your business area.
- Oracle iSetup.
- Oracle Self-Service Web Applications.

  To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

The Oracle iSetup User Guide contains the information you need to understand and use Oracle iSetup. This guide contains nine chapters:

- Chapter 1 provides an overview of Oracle iSetup. It also gives you a brief introduction of Oracle iSetup's two main components, namely, iSetup Migrator, and iSetup Reporter. It also describes how to use Oracle iSetup in different scenarios.
- Chapter 2 contains guidelines on preparing the source and target instances for extracting and loading setup data.
- Chapter 3 describes how to use iSetup Migrator to extract a collection of setup data and move it to another instance.
- Chapter 4 describes how to use iSetup Reporter to create HTML or Text reports. Reports can be generated on setup objects contained in a snapshot only or a snapshot file.
- Chapter 5 describes the login details about the various components of Oracle iSetup.
- Chapter 6 gives you details of all the screens used for creating and maintaining database mappings.
- Chapter 7 gives you details of all the screens used in extracting setup data and creating Snapshot.
- Chapter 8 gives you details of all the screens that are used in loading setup data.
- Chapter 9 gives you details of all the screens that you go through for generating reports on setup data.
- Appendix A contains a sample of Driver File and Template File.
- Appendix B contains information about the DBC File.
- Appendix C contains details of all the Selection Sets that come with iSetup Migrator.

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JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

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This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle iSetup.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation-** See the Online Documentation CD for current PDF documentation for your product with each release. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help -** You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **Release Content Document -** See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on Oracle*MetaLink*.
- **About document -** Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on Oracle*MetaLink*.

Related Guides

Oracle iSetup shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle iSetup.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Cash Management User Guide

This guide describes how to reconcile bank statements with your outstanding balances, payments, transactions, and receipts. It also provides information about generating cash forecasts and cash positions.

Oracle Assets User Guide

This guide describes how to add, maintain, and retire assets. It also provides information about depreciation, asset accounting, and capital budgeting.

Oracle General Ledger User Guide

This guide explains how to plan and define your chart of accounts, accounting period types and accounting calendar, functional currency, and set of books. It also describes how to define journal entry sources and categories so you can create journal entries for your general ledger. If you use multiple currencies, use this manual when you define additional rate types, and enter daily rates. This manual also includes complete information on implementing Budgetary Control.

Oracle Payables User Guide

This guide describes how accounts payable transactions are created and entered in Oracle Payables. This guide also contains detailed setup information for Oracle Payables.

Oracle Receivables User Guide

Use this manual to learn about Oracle Receivables invoice processing and invoice formatting, defining customers, creating transactions, importing transactions using AutoInvoice, and defining Automatic Accounting in Oracle Receivables.

Oracle Purchasing User's Guide

This guide describes how to enter and manage the requisitions and purchase orders that relate to your projects.

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 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 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 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 Advance 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 ho w to plan in various manufacturing environments are also addressed in this guide.

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.

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 Shipping Execution User's Guide

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

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 Public Sector Financials (International) User's Guide

This guide extends Oracle Financials functionality and provides the basis for an integrated financial management solution for public sector agencies. It describes relevant features such as budgeting extensions, construction industry scheme, exchange protocol, dossier, and single third party. Additionally, setup steps and procedures are also addressed in this guide.

Oracle Applications User's Guide

This guides explains how to enter data, query and run reports, as well as navigate using the graphical user interface (GUI) available with this release of Oracle iSetup User Guide (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Oracle HRMS Documentation Set

This set 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 manuals 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.

Managing People Using Oracle HRMS. Use this guide to find out about entering employees.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

"About" Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the "About" document for your product. "About" documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle iSetup implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

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Training

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Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle iSetup working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications 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 Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, 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 Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications 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.

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Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

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1 Introduction

This chapter contains the following sections:

- About Oracle iSetup
- Components of Oracle iSetup
- Oracle iSetup Usage Scenarios

1.1 About Oracle iSetup

Oracle iSetup is a solution that facilitates the setup and management of setup parameters of the Oracle E-Business Suite. Using Oracle iSetup you can:

- Migrate setup data from one Oracle E-business Suite instance to another.
- Generate reports on setup data.

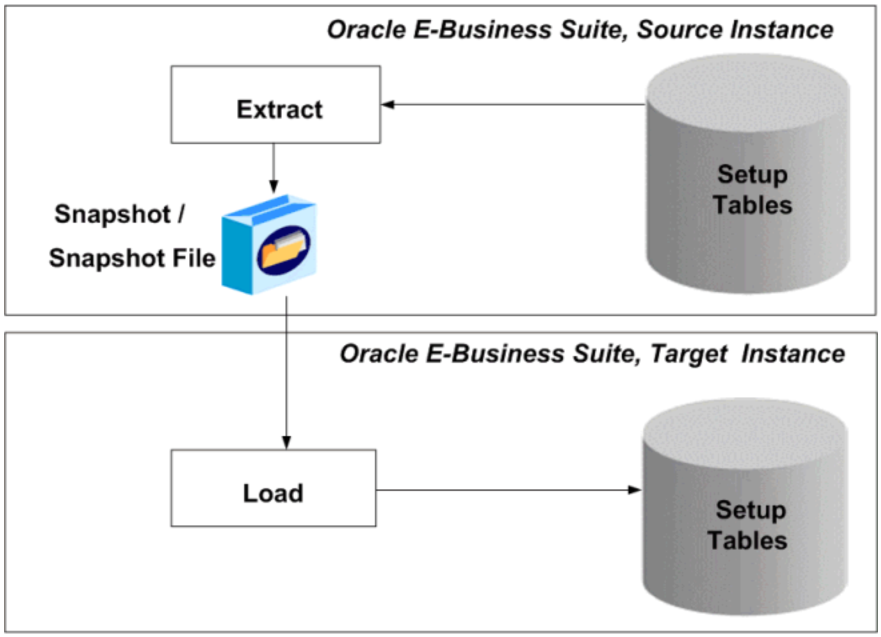
1.2 Components of Oracle iSetup

Oracle iSetup consists of the following components:

- iSetup Migrator
- iSetup Reporter

1.2.1 iSetup Migrator

Figure 1–1 Functional Flow for iSetup Migrator



iSetup Migrator lets you conveniently move setup data from one instance of the Oracle E-Business Suite to another. Using iSetup Migrator you can extract a complete or partial collection of setup data and move it to a new instance. You can also use iSetup Migrator to copy data within the same instance.The iSetup Migrator uses a two-step process for moving your data from one instance to another.

Extract

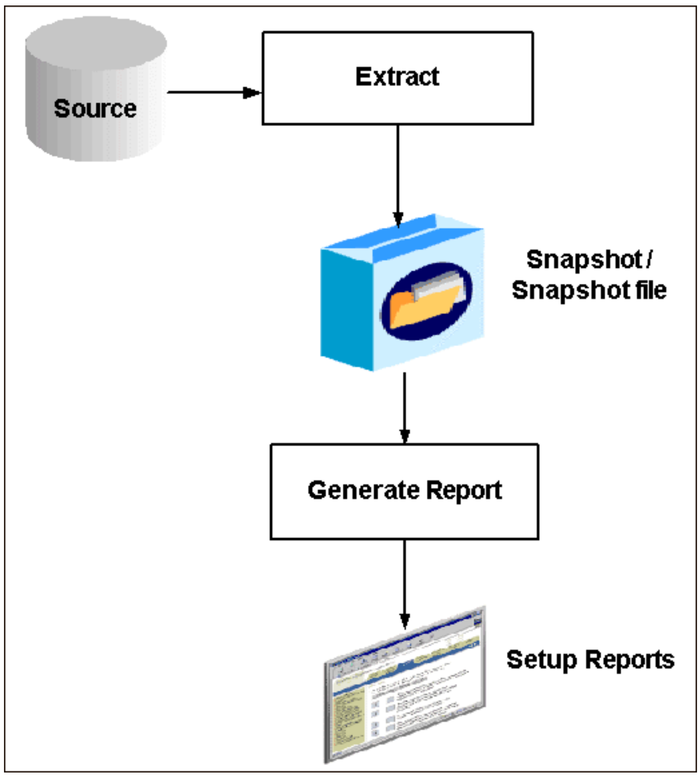
For extracting data you can choose one of the predefined Selection Set templates. A Selection Set is a collection of setup objects for which you can extract data. You can set filters on setup objects to extract a sub-set of data. Oracle iSetup saves the extracted setup data as a Snapshot. You can download the Snapshot and save it as a file on your local file system.

Load

After completing your extract you can load the resulting Snapshot or a saved Snapshot File to a target instance. You can modify certain attributes of the extracted data before loading it into the target instance.

1.2.2 iSetup Reporter

Figure 1–2 Functional Flow for iSetup Reporter



The iSetup Reporter lets you create reports on setup data. The source of data for the report can be a Snapshot or a Snapshot File. You can save and print the reports through the functionality provided by the web-browser.

1.3 Oracle iSetup Usage Scenarios

Oracle iSetup facilitates your implementation. During a typical implementation you go through multiple cycles of setting up your Oracle E-Business Suite instance, refining setup parameters, and testing each of the instances for business transactions. The scenarios described below explain the use of Oracle iSetup in your implementation. A detailed explanation of these scenarios is explained in the subsequent sections.

- Moving from Conference Room Pilot (CRP) Instance to System Test Instance to Production Instance
- Keeping Record of your Setup Parameters

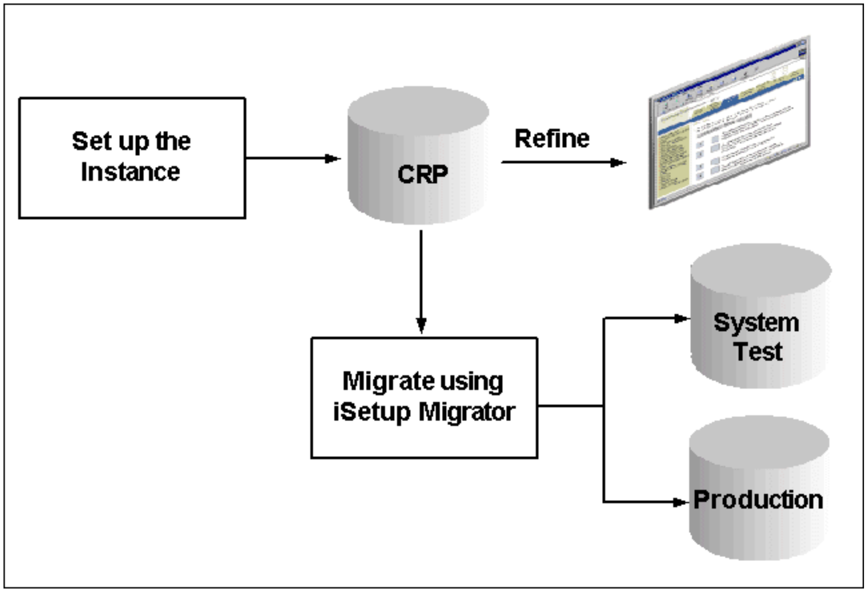
1.3.1 Moving from Conference Room Pilot (CRP) Instance to System Test Instance to Production Instance

After the Conference Room Pilot (CRP) instance has been set up, you can start testing the system with your project team, make necessary changes in the setup parameters, and fine-tune setup parameters to meet business needs. After making changes and testing, you can move the setup data to the System Test instance. To do this you can use one of the scenarios described below that best fits your needs. Depending on your needs you can also use a combination of any number of scenarios described below.

Change Setup Parameters in CRP instance and move to System Test instance

You may want to make changes to the setup parameters in your CRP instance to fine tune the setup data to meet your business needs. After this you can migrate your data from the CRP instance to System Test instance using iSetup Migrator, see the following figure for illustration. You can use the same approach to move to the next instance in your implementation cycle, until you reach production instance.

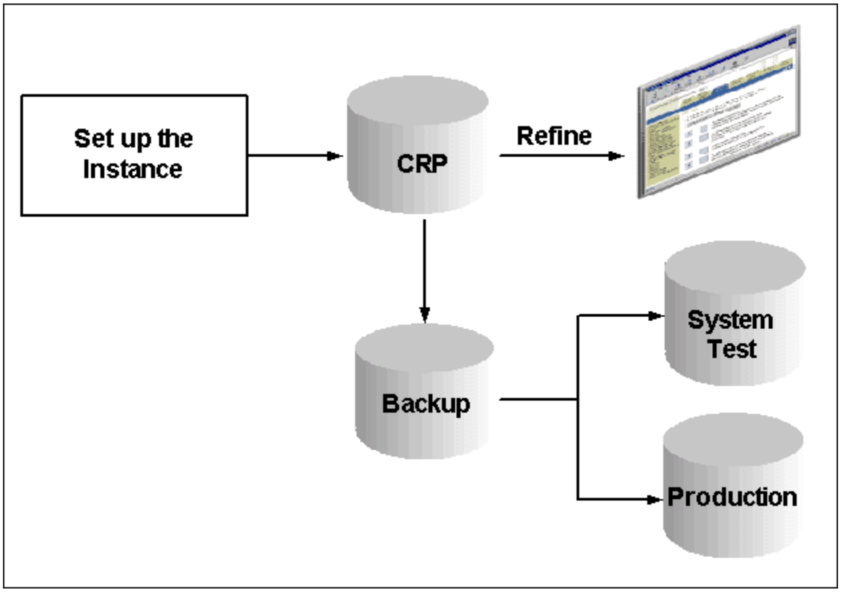
Figure 1–3 Refining CRP Setup Parameters and Use iSetup Migrator to Create System Test Instance



Clone CRP instance and move to System Test instance

You can also backup your CRP instance and create its clone as the next instance. See the following figure for illustration. You can use the same approach to move to the whatever your next instance is in your implementation cycle, until you reach production instance.

Figure 1–4 Cloning CRP instance to Create System Test instance



1.3.2 Keeping Record of your Setup Parameters

When you turn over your production instance to the end users, you may want to keep record of the setup data. This will help you refer back to setup data you started from, in case users report problems. Using iSetup Migrator extract your setup data and create a snapshot. You can create reports on the setup data in this Snapshot using iSetup Reporter.

2 Installation

This chapter contains steps that you should follow to set your source and target environments. The source environment needs to be set before you can extract data from it. The target environment needs to be set before you can load setup data into it. The sections below outline the steps to prepare the source and target environments:

- Database Mapping
- Preparing the Target Instance

2.1 Database Mapping

You must establish database mapping to communicate with the remote database instances for extract and load. Using the database mapping tool you can define database instances. These instances appear as a list of values for source and target instances in the extract and load screens.

2.1.1 Different Database Instances

The term describing the different database instances that you interact with while using Oracle iSetup are explained below:

- Source Instance: This is the Oracle E-Business Suite instance that is the source of setup parameters. You extract setup data from this instance.
- Central Instance: This is the Oracle E-Business Suite instance where iSetup Migrator is running. It generally does not include other applications besides iSetup.
- Target Instance: This is the Oracle E-Business Suite instance that is the target for the setup parameters. You load extracted setup data into this instance. This

instance need not be a freshly installed instance. It may already contain certain setup data.

Note: Not all set up objects support update currently. So it may be possible that a modification to a certain setup object does not get migrated.

2.1.2 Database Mapping Concepts

The different database mapping rules that you need to follow are:

- The central instance should have a dbc file for each remote instance.
- Create a database mapping for each instance, including the central instance.
- To connect to remote environments you must create a user name on all the instances that matches the username you log on with to the central instance when you use iSetup. For example,
  - For extracting data, define the same username in both your central instance and source instance.
  - For loading data, define the same username in both your central instance and target instance.

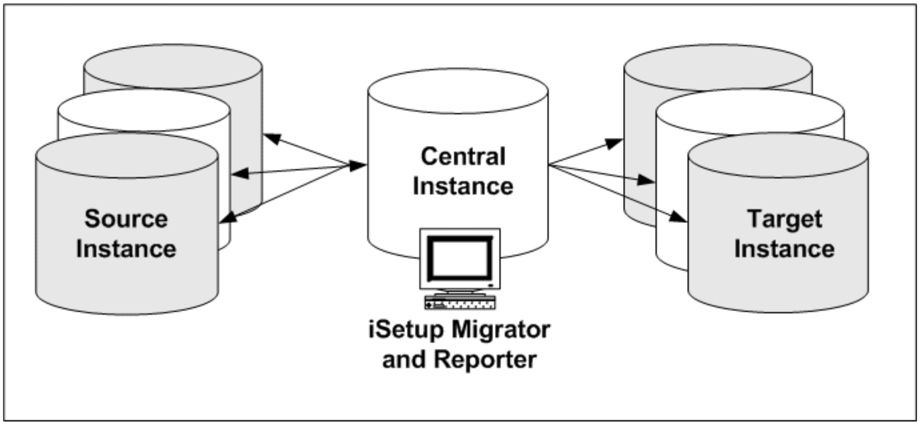
For more details in the Database Mapping Concepts section refer to Appendix B.

2.1.3 Database Mapping for using Oracle iSetup Migrator

You have to map the source and target databases before you can migrate setup data. The database mapping topology is shown in the following figure.

You should have a central instance on which Oracle iSetup Migrator and Reporter run. Your target database may be changing depending upon where you are in the implementation cycle. You can use the same central instance to perform migrations after your implementation.

Figure 2–1 Database Topology to Extract and Load Data



2.1.4 Logging in to do Database Mapping

Oracle iSetup is a part of the Oracle E-Business Suite. Login to Oracle iSetup using the self-service login URL to access all the functions available in iSetup Migrator.

Login to Oracle E-Business Suite

Your user name should have access to the Oracle iSetup responsibility in order to access iSetup Migrator.

1. Login to the Oracle E-Business Suite using your user name and password.

Choose Responsibility

2. From the list of responsibilities, choose **Oracle iSetup** in order to access iSetup Migrator. This takes you to the iSetup function list screen.

Choose a Function

3. To map databases, choose the **iSetup Migrator** function. Click on the **Administration** tab. This takes you to the Administration main screen.

For more details on the screens in the Logging in to do Database Mapping section refer to iSetup Migrator and Reporter Login.

2.1.5 Creating a Database Mapping

To create a new database mapping, you must have a DBC File created for that instance.

Follow the steps below to create a new database mapping.

Navigate to the Create Database Mapping screen

1. Click on the **Create Database Mapping** button on the Administration main screen. This takes you to the Create Database Mapping screen.

Enter Database Parameters

2. Enter an instance name for the mapping. This name must be unique. The instance name specified here is used in the source and target instance drop-down boxes on the extract and load screens.
3. Enter a database host name for the mapping. This name must be a valid network host name.
4. Enter the database ID (SID) used to connect to the database instance.

Select Responsibility

5. Select a responsibility that you will use to access the Oracle E-Business Suite for extracting and loading purposes. By default, you can select the Oracle iSetup responsibility from the list of values. If you want to use another responsibility, that responsibility must have access to the concurrent manager on the instance that you are trying to map.

Save New Database Definition

6. Click on the Apply button to save your new database definition. This takes you back to the Administration main screen.

For an in-depth explanation on different screens in this section, refer to the Database Mapping Screen Reference chapter.

2.2 Preparing the Target Instance

While using iSetup Migrator follow all the steps given below to get the target Oracle E-Business Suite ready for the load, unless noted otherwise.

Installation

1. Ensure that the target Oracle E-Business Suite is successfully installed at the release level approved for use with the current version of Oracle iSetup. To confirm the required release level, log on to Oracle Metalink (on the web http://metalink.oracle.com) and search for “Oracle iSetup 11i10”.

Oracle Human Resources Install

2. Ensure that Oracle Human Resources is either shared install or full install. Full install is required only if you will be using Oracle Human Resources, Oracle Payroll, or Oracle Advanced Benefits functionality.

Recompile Database Objects

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

Set Open Cursor Limit

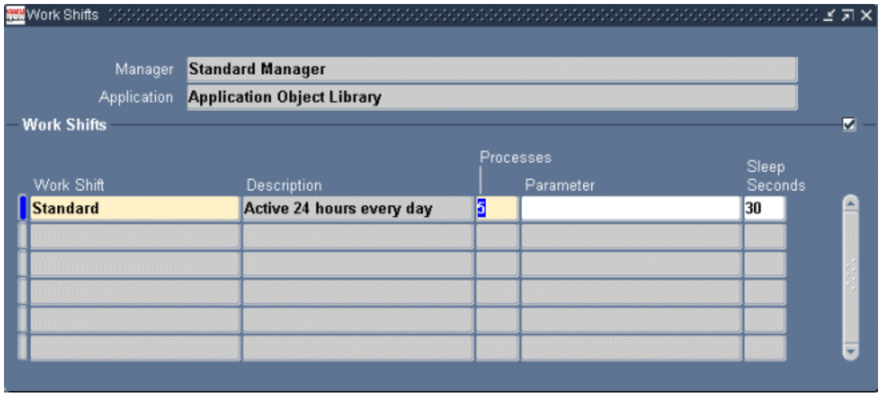
4. Set open cursor limit to 750 for your database. This setting is in the init.ora file for the database. The default value for this is 500. If this value is not set, you may encounter a error because the load may exceed the maximum open cursor limit.

Set Sleep Seconds for Concurrent Manager

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

5. Navigate to Concurrent>Manager>Define.
6. Open the Define form and query for Standard Manager. Click on the Work Shifts button to continue. This takes you to the Workshifts screen.
7. Check the Sleep Seconds setting. Make sure the Sleep Seconds is set to 30 seconds or less.

Figure 2–2 Sleep Second Setup



3 Using iSetup Migrator

This chapter describes the steps that you need to go through to migrate setup data from one Oracle E-Business Suite instance to another. These steps are described in the following sections:

- Preparing Source and Target Environments
- Logging into iSetup Migrator
- Extracting Setup Data
- Loading a Snapshot

3.1 Preparing Source and Target Environments

Make sure you have setup your source and target environments for the extract and load processes. Refer to the Installation chapter for detailed instructions.

Once your source and target environments are ready you can start the extract and load processes.

3.2 Logging into iSetup Migrator

The iSetup Migrator component of Oracle iSetup is a part of the Oracle E-Business Suite. Login to the Oracle E-Business Suite using the self-service login URL to access all the functions available in iSetup Migrator.

Login to Oracle E-Business Suite

1. Login to the Oracle E-Business Suite using your user name and password. Your user name must have access to Oracle iSetup responsibility to access iSetup Migrator.

Choose Responsibility

2. From the list of responsibilities, choose **Oracle iSetup** in order to access iSetup Migrator, this takes you to the iSetup function list screen.

Choose a Function

3. Choose the **iSetup Migrator** function. This takes you to the Migrations: Selection Set main screen.

    - To extract data, choose **Create Selection Set** button or choose an existing one.
    - To load data, choose the **Load** tab on the Migrations: Selection Set main screen. This takes you to the Migrations: Load main screen.

    For more details on screens in the Logging into the iSetup Migrator section refer to the iSetup Migrator and Reporter Login section.

3.3 Extracting Setup Data

To migrate data from one instance to another, you need to first extract data from the source instance.

To extract setup data follow the steps listed below:

- **Create a Selection Set:** To extract data you have to first create a Selection Set. This is explained in the Creating Selection Set section.
- **Create a Snapshot:** After you create a Selection Set you have to extract it to create a Snapshot. This is described in the Extracting Setup Data to Create Snapshot section.

3.3.1 Creating Selection Set

A Selection Set is a collection of setup objects for which you want to extract data. Follow the steps outlined below to create a Selection Set:

Go to the Create Selection Set screen

1. On the Migrations: Selection Set screen, click the **Create Selection Set** button. This takes you to the Create Selection Set: Specify Selection Set Template screen.

Choose a Selection Set Template

2. Choose a **Selection Set Template** that you wish to use as a starting point for the extract.

3. Click **Continue**. This takes you to the Create Selection Set: Specify Name Source and Filters screen.

Complete your Selection Set Details

4. Enter a name for your Selection Set. The name you enter appears on the list of saved selection sets. You can later reuse the selection set instead of creating a new one.

5. Select a **Source Instance** from where you want to extract setup data.

Set Filter

You can set filters to refine the data extraction for a given object. Depending on the business rules defined in the Selection Set template, you may or may not be able to set filters on certain setup objects.

6. To set filters click on the S**et Filter** icon. This takes you to the Specify Name, Source and Filters: Set Filter screen. Depending on the setup object selected, you get a list of fields for which you can specify filter criteria.

   The attribute values for filters are read from the source instance. For example, you can click on Lookup icon to read values from the source database instance.

7. Click on the **Apply** button to save updates. The changes are saved and you are back to the Create Selection Set: Specify Source Name and Filters screen.

Save Selection Set

8. Click on the **Save** button to save your Selection Set. This saves your changes and takes you back to the Migrations: Selection Set screen.

For more details on different screens in Creating Selection Set section, refer to the Extracting Setup Data Screen Reference chapter.

3.3.2 Extracting Setup Data to Create Snapshot

The next step is to extract the setup data into a Snapshot. iSetup uses your selection set as the instructions for what to extract.

Follow the steps described below to create a Snapshot.

Choose a Selection Set for Extract

1. To extract setup data, choose a S**election Set** from the Migrations: Selection Set screen. Click on the **Extract** button.

Name the Snapshot

2. Specify a name for the Snapshot that iSetup will generate for your extract request.
3. You can schedule your extract request to run at a later time.
4. Click on the **Submit** button to submit the extract request.

Confirmation of the Extract Request

5. When you submit the extract request, Oracle iSetup submits the extract request to the concurrent manger on the source instance and takes you to the Confirmation: Extract Request Submitted screen.

View Status of the Extract Request

Monitor the status of extract request for normal completion.

6. To view the extract status you can:

   Click on the **Check Status** button on the Confirmation: Extract Request Submitted screen. This takes you to the View Request Details screen that gives you the status of your extract request.

   OR

   Select the **Extract Request** from the Extract History table on the Migrations: Extract screen and click on the **View Request Details** button. This takes you to the View Request Details screen which gives you the status of your extract request.

For more details on different screens in Extracting Setup Data section, refer to the Extracting Setup Data Screen Reference chapter.

3.4 Loading a Snapshot

To complete your migration, you have to load the Snapshot into the target instance.

Follow the steps below to load a Snapshot.

Submit a New Load Request

1. Navigate to the Migrations: Load screen.
2. Click on the **Submit Load Request** button to submit a new load request.

Select Data Source and Target Instance

3. Select a **Source** from where the setup data is to be read for the load.

   You have the option to:

   - Load a Snapshot that you have extracted and stored in the central instance of Oracle E-Business Suite.
   - Load a Snapshot File from your desktop.

4. Select a **Target Instance** to load your Snapshot or Snapshot File.

   Note: To copy/clone setup data, specify the name of source instance that you extracted the data from as your target instance. In other words you are migrating from and to the same instance. You also need to use the Set Target Values feature to rename or reparent the object.

5. Click **Next** to continue. This takes you to the Load Request: Review and Edit Data screen.

Review and Edit Data

Before you submit your load request you can review the extracted data and set new attribute values for certain setup objects before loading it into the target instance. If the setup object attribute values can be edited, the set target values icon is enabled.

The Load Request: Review and Edit Data screen displays all the setup objects, read from the Snapshot, that are to be loaded into the target instance.

6. You have two options here:

   If you do not want to set new attribute values for setup objects, click on the **Next** button to continue. This takes you to Load Request: Specify Parameters and Submit screen. Go to step 8 for the next steps.

   OR

   To set new attribute values for certain setup objects before loading them into the target instance. Click on the **Set Target Values** icon. This takes you to the Load Request: Review and Edit Data: Set Target values screen.

Set Target Values

7. You can change the setup object attributes individually or replace them as a group.

   - **Replace Individually**

     Click on the **List of Values** icon or enter text in the text field to replace individual setup object attribute values before loading. Fields contain a list of values icon so you can select an actual value read from the target instance or have a free-form text field, where you can enter any value for replacement.

   - **Replace as a Group**

     Click on the **Replace as Group** button to set the attribute of all the records of this setup object to a new target value.

     Enter the new attribute target value for the setup objects and click on the **Apply** button. This populates all the records in the table with the same attribute target value. This takes you back to the Set Load Request: Review and Edit Data: Set Target Values screen.

8. Click **Next** to continue. This takes you to Load Request: Specify Parameters and Submit screen.

Specify Parameters and Submit

9. You can schedule a time to run the load request.
10. Click **Submit** button to submit the load request.

Confirm Load Request

11. When you submit the load request, Oracle iSetup submits the load request to the concurrent manger on the target instance. This takes you to the Confirmation: Load Request Submitted screen.

View Load Request

Monitor the status of your load request for normal completion.

12. To view the load request status you can:

    Click on the **Check Status** button from the Confirmation: Load Request Submitted screen. This takes you to the View Request Details screen. This screen gives you the status of your load request.

    OR

Select the Load Request from the Load History table on the Migrations: Load screen and click on the **View Request Details** button. This takes you to the View Request Details screen which gives you the status of your load request.

For more details on different screens in Loading Snapshot section, refer to the Loading Setup Data Screen Reference chapter.

4 Using iSetup Reporter

This chapter describes the steps that you need to go through to report on the setup data. These steps are described in the following sections:

- Logging into iSetup Reporter
- Generating Reports
- Viewing Report Output

4.1 Logging into iSetup Reporter

The iSetup Reporter component of Oracle iSetup is a part of the Oracle E-Business Suite. Login to the Oracle E-Business Suite using the self-service login URL to access all the functions available in iSetup Reporter.

Login to Oracle E-Business Suite

1. Login to the Oracle E-Business Suite using your user name and password. Your user name must have access to Oracle iSetup responsibility to access iSetup Reporter.

Choose Responsibility

2. From the list of responsibilities, choose **Oracle iSetup** in order to access iSetup Reporter, this takes you to the iSetup function list screen.

Choose a Function

3. Choose the **iSetup Reporter** function. This takes you to the Reports main screen.

   For more details on screens in the Logging into the iSetup Reporter section refer to the iSetup Migrator and Reporter Login section.

4.2 Generating Reports

You can generate reports for your setup parameters using the report feature. Reports generated by Oracle iSetup contain data for all setup objects read from the specified data source. The data source can be a Snapshot or a file stored on your desktop computer.

Submit a New Report Request

1. After you login to iSetup Reporter, click on the **Reports** tab. This takes you to the Reports History screen.
2. Click on the **Submit Report Request** button to start a new report request.

Specify Data Source

You can report on a Snapshot or Snapshot File from iSetup Migrator. To generate a Snapshot follow the instructions given in the Extracting Setup Data section.

3. Select a data source from where the setup data is to be read for the report. Click **Continue**.

Specify Parameters and Submit

4. On the Report Request: Specify Parameters and Submit screen, enter a report name for the report. This Report Name is displayed as header information in the report output.
5. Specify a sorting order for the report output.
6. Schedule a time to run the report request.
7. Specify if you want to print the output to a specific printer upon successful completion of the report request.
8. Click the **Submit** button to submit your report request.

Confirm Report Request

9. When you submit the report request, Oracle iSetup submits your report request to the concurrent manager and takes you to the Confirmation: Request Submitted screen.

View Request Details

Monitor the status of your report request for normal completion.

10. To view the report request status you can:

Click on the **Check Status** button from the Confirmation: Report Request Submitted screen. This takes you to the View Request Details screen that gives you the status of your Report Request.

OR

Select the Report Request from the Report History table on the Reports: screen and click on the **View Request Details** button. This takes you to the View Request Details screen that gives you the status of your Report Request.

4.3 Viewing Report Output

You can see the report output in two formats: Report for a specific setup object and Complete Report for all setup objects. To view a report click on the **View Output** button on the View Request Details screen. This takes you to the Report Index screen, which lists all the setup objects included in the report.

View Complete Report for all Setup Objects

1. To view the entire Report, click on the **View All** button on the Report Index screen. This takes you to a detailed report for all setup objects as read from the data source.

View Report for a Specific Setup Object

2. Click on a **Setup Object** hyperlink on the Report Index screen. This takes you to a detailed report for the specific setup object.

For more details on the different screens in Generating Reports section refer to the Generating Reports Screen Reference chapter.

5 Login Screen Reference

This chapter contains an in-depth explanation for the iSetup Migrator and Reporter login.

5.1 iSetup Migrator and Reporter Login

Use the standard login functionality of the Oracle E-Business Suite to login to iSetup Migrator and Reporter. After you login select Oracle iSetup responsibility. If the Oracle iSetup Responsibility is not already linked to your username, contact your System Administrator to do so.

For more details refer to the Oracle Applications System Administrator's Guide and Oracle Applications User Guide.

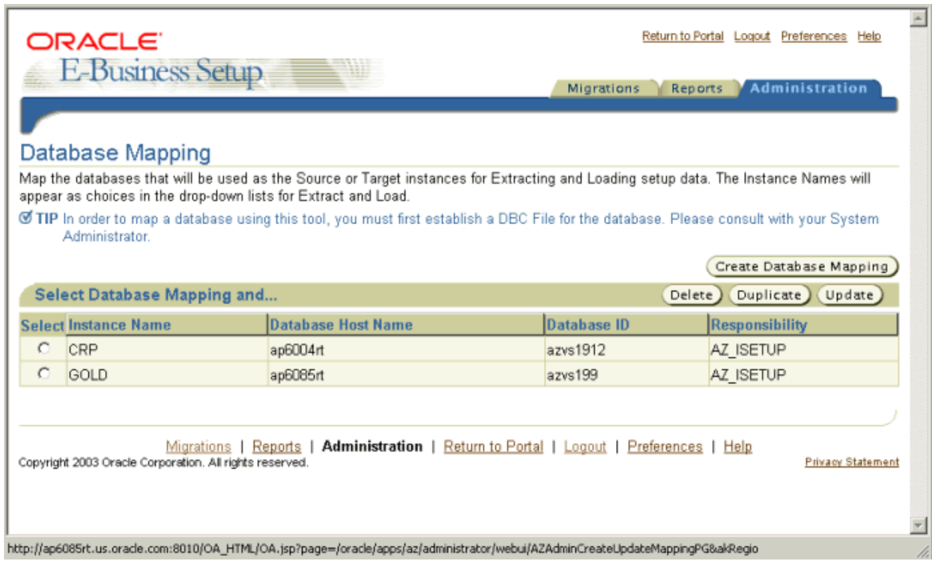
6 Database Mapping Screen Reference

This chapter contains in-depth explanation about the following screens:

- Administration: Database Mapping
- Create, Duplicate, and Update Database Mapping
  - Create Database Mapping
  - Duplicate Database Mapping
  - Update Database Mapping
- Search and Select: Responsibility

6.1 Administration: Database Mapping

Figure 6–1 Administration: Database Mapping



Database Mapping Table: This table displays all the database mappings that you have created. You can only see your own database mappings. This table displays 10 records at a time. If you have not created any database mappings, the table shows “No data exists”.

Select: Allows you to select a mapped instance for further action of Delete, Duplicate or Update.

Instance Name: Displays the instance name specified by you at the time of database mapping. By default, the table is sorted by instance name. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Database Host Name: Displays the database host name, specified by you at the time of database mapping. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Database ID: Displays the database ID (SID) used to connect to the database instance. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Responsibility: Displays the responsibility that is used to access the Oracle E-Business Suite for extracting and loading. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Create Database Mapping: Allows you to create a new database mapping. Clicking this button takes you to the Create Database Mapping screen.

General Navigation

Delete: Allows you to delete the selected database mapping. Clicking this button takes you to the Delete Confirmation-Warning screen.

On the Delete Confirmation-Warning screen you can click on Cancel to get back to the Administration: Database Mapping screen or Apply to proceed with the delete. If you choose to Apply, the selected database mapping is removed from the database mapping list.

Duplicate: Allows you to copy a database mapping. Clicking this button takes you to the Duplicate Database Mapping screen. The Database Instance Name on that screen is in the format “Copy of <Database Instance Name>”. You can change it to a different name.

Update: Allows you to update a database mapping. Clicking this button takes you to the Update Database Mapping screen.

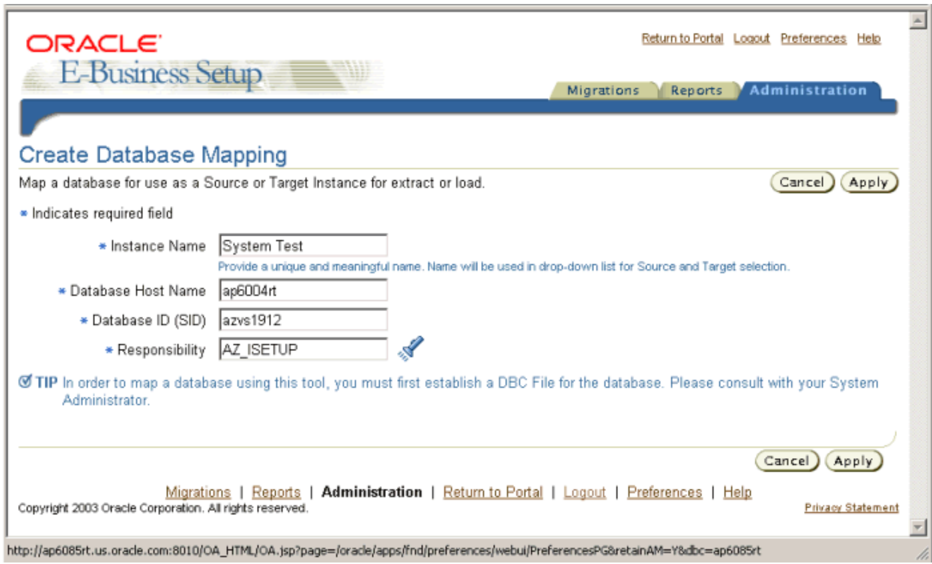
6.2 Create, Duplicate, and Update Database Mapping

The following screens are included in this section:

- Create Database Mapping
- Duplicate Database Mapping
- Update Database Mapping

6.2.1 Create Database Mapping

Figure 6–2 Create Database Mapping



Instance Name: Allows you to enter an instance name for mapping. This name has to be unique.You use this instance name to identify the source and target instances during extract and load processes.

Database Host: Allows you to enter a database host name for mapping.

Database ID: Allows you to enter a database ID (SID). The SID is used to connect to the remote database instance.

Responsibility: Allows you to enter a responsibility that is used to access the Oracle E-Business Suite for extracting and loading. When you click on the list of values icon, a connection is established with the remote instance to get a list of values for your user name. You can use Oracle iSetup responsibility or choose the responsibility that best fulfils your need. For details refer to Search and Select: Responsibility.

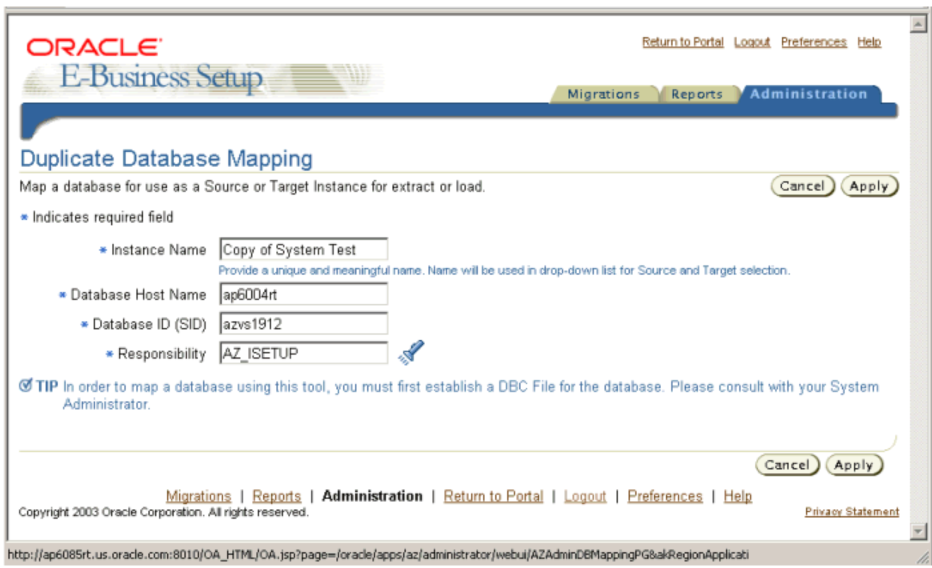
General Navigation

Cancel: Aborts the current process and takes you back to the Administration: Database Mapping screen.

Apply: Clicking this button creates a new database mapping. A validation check is run for required fields. In case of error, you get an error message. If it does not encounter any error, it takes you back to the Administration: Database Mapping screen, with the newly created record displayed in the table.

6.2.2 Duplicate Database Mapping

Figure 6–3 Duplicate Database Mapping



Instance Name: Displays the database instance name that is being duplicated.

Database Host Name: Displays the database host name that is being used for the duplication. You can change the database host name if you want.

Database ID: Displays the database ID (SID) used to connect to the remote database instance. You can enter a new SID.

Responsibility: Displays the responsibility of the original debase mapping. Lets you enter a new responsibility that is used to access the Oracle E-Business Suite for extracting and loading. When you click on the list of values icon, a connection is established with the remote instance to get a list of values for your user name. You can use Oracle iSetup responsibility or choose the responsibility that best fulfils your need. For details refer to Search and Select: Responsibility.

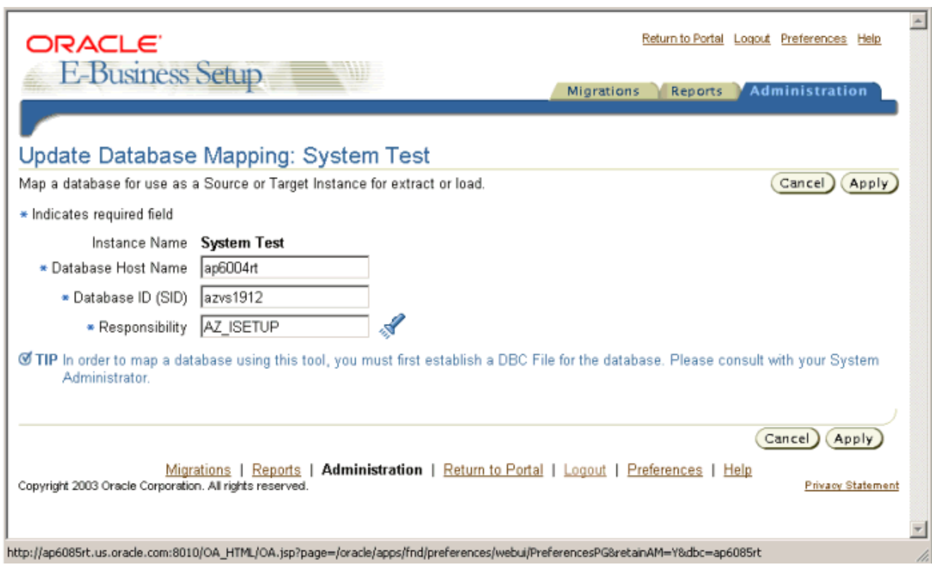
General Navigation

Cancel: Aborts the current process and takes you back the Administration: Database Mapping screen.

Apply: Clicking this button updates the database mapping. Before the update a validation check is run for required fields. In case of error, you get an error message. If it does not encounter any error, it saves the changes and takes you back to the Administration: Database Mapping screen.

6.2.3 Update Database Mapping

Figure 6–4 Update Database Mapping



Instance Name: Displays the database instance name that is being updated.

Database Host: Displays the database host name that is being used for the mapping. You can change the database host name if you want.

Database ID: Displays the database ID (SID) used to connect to the remote database instance. You can enter a new SID.

Responsibility: Allows you to enter a responsibility that is used to access the Oracle E-Business Suite for extracting and loading. When you click on the list of values icon, a connection is established with the remote instance to get a list of values for your user name. You can use Oracle iSetup responsibility or choose the responsibility that best fulfils your need. for details refer to Search and Select: Responsibility.

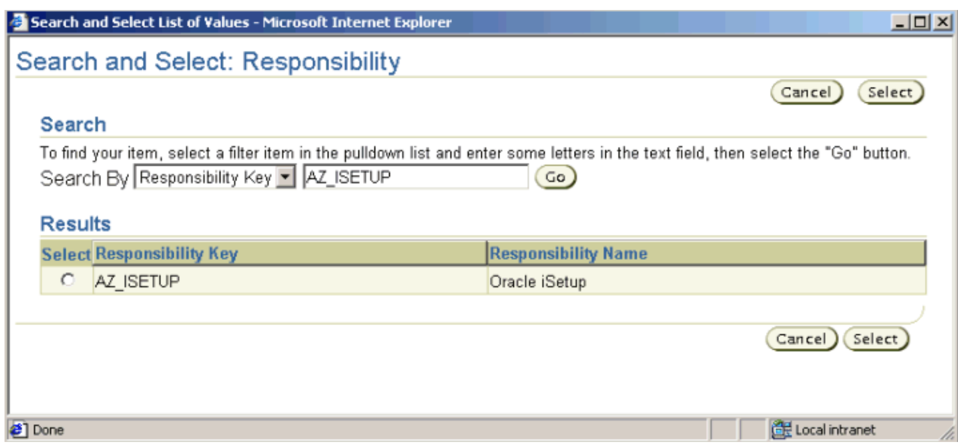
General Navigation

Cancel: Aborts the current process and takes you back the Administration: Database Mapping screen.

Apply: Clicking this button updates the database mapping. Before the update a validation check is run for required fields. In case of error, you get an error message. If it does not encounter any error, it saves the changes and takes you back to the Administration: Database Mapping screen.

6.3 Search and Select: Responsibility

Figure 6–5 Search and Select: Responsibility



Search By: Allows you to enter the string by which you want to search the responsibility. You can enter the search string using wild cards. If you want to get all the responsibilities you can leave the search string blank.

Go: Clicking on Go button gets the list of responsibilities for your user name, and matching your search criteria.

Select: Allows you to select a responsibility key for further action.

Results Table: This table displays the list of active responsibilities linked to your user name in the remote database instance, and those matching your search criteria.

Select: Allows you to select a responsibility that you want to use at the time of extract or load, as a part of the database mapping.

Responsibility Key: Displays the list of responsibilities that you can choose from. These responsibilities are defined in the remote instance.

General Navigation

Cancel: Aborts the current process and takes you back the Create Database Mapping or Update Database Mapping screen as the case may be.

Select: Accepts your chosen responsibility key for further action.

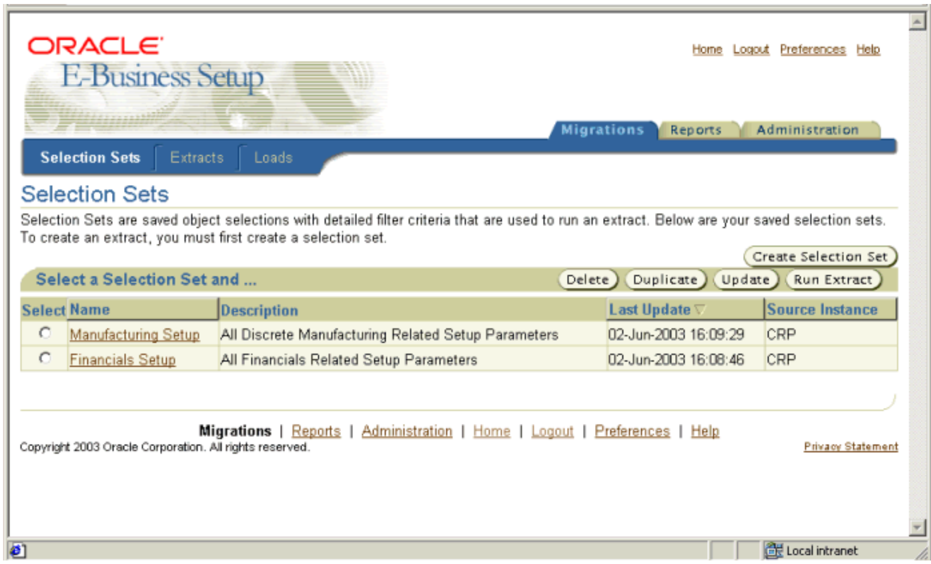
7

Extracting Setup Data Screen Reference

This chapter contains in-depth explanation about the following screens:

7.1 Selection Sets

Figure 7–1 Selection Sets



Selection Set Table: This table displays the Selection Sets requests that you have created so far. You can only see the Selection Sets that you have created. The table displays 10 records at a time. If you have not created any Selection Set, the table shows “No data exists”.

Select: Allows you to select a Selection Set for further action.

Name: Displays the name of the Selection Set. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence. Clicking on the name takes you to the Update Selection Set: Selection Criteria screen.

Description: Displays the description of the Selection Set, if available. This field may be blank if you did not specify a description. You cannot sort based on this column.

Last Update: Displays last update date for the Selection Set. If you have not updated the Selection Set, the creation date is displayed. By default, the Selection Set table is sorted by last update date. In descending order, the latest edited Selection Sets is shown first. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Source Instance: Displays the source instance from where you are extracting the setup data. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Create Selection Set: Allows you to create a new Selection Set. Clicking this button takes you to the Create Selection Set: Selection Set Template screen.

Delete: Allows you to delete the selected Selection Set. Clicking the Delete button takes you to the Delete Confirmation-Warning screen.

On the Delete Confirmation-Warning screen you can click on the Cancel button to go back to the Migrations: Selection Set screen. To proceed with the delete click on the Apply button. The selected Selection Set is removed from the database.

Duplicate: Allows you to copy a Selection Set. Clicking this button takes you to “Duplicate <Selection Set Name>” screen. On the Duplicate <Selection Set Name> screen, the Selection Set name field reads “Copy of X”, where X is the name of the original Selection Set.

Update: Allows you to update a Selection Set. Clicking this button takes you to the Update Selection Set: Selection Criteria screen.

Run Extract: Allows you to run an extract using a Selection Set. Clicking this button takes you to the Extract Selection Set: Review Selection Criteria screen.

7.1.1 Extract History

Figure 7–2 Extract History

Extract History (Snapshots) Table: This table displays the extract requests that you have submitted in the past. You can only see your own extract requests. The table displays 10 records at a time. If you have not submitted any extract requests, the table shows “No data exists”.

Select: Allows you to select a Snapshot for further action.

Snapshot Name: Displays the name of the Snapshot specified by you while extracting setup data. Clicking this button takes you to the View Request Details screen for the particular extract request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Request ID: Displays the Request ID that the concurrent manager assigns to the the extract request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Source Instance: Displays the source of the setup data for a particular Snapshot. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Submitted On: Displays the submission date for the extract request. By default, the Extract History table is sorted by submitted on date, in descending order, the latest extract submitted is shown first. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Phase: Displays the phase of the request. You can click on the column header to sort by that column in alternating ascending and descending sequence. The following values are displayed in this field:

- "Completed" - Concurrent Manager has finished the request.
- "Inactive" - Request cannot be processed. This means concurrent manager on the source instance is down. Contact your system administrator to solve this problem.
- "Pending" - Request has been submitted, but not picked up by a concurrent manager. You should continue to monitor.
- "Running" - Processing

Status: Displays the status of the request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence. The following values are displayed in this field:

- When a request is in phase ="Pending", it can be in one of these status:

  "Normal" - Request is ready and is to be picked up by the next manager.

  "Standby"- An incompatible program is run now so the request is in standby state.

  "Scheduled"- Your request has been scheduled for a later date and time.

  "Waiting"- A specific request is waiting for another request, usually in the same request set.

- When a request is in phase = "Running", it can be in one of these status:

  "Normal" - Process is running normally.

  "Paused" - In a report set, a child request is waiting for the parent to finish (Note: May not be necessary for Download).

  "Resuming" - Parent is restarting after child requests are finished.

"Terminating" - Your request has been terminated.

- When a request is in phase ="Completed", it can be one of these status:

  "Normal" - Everything went well.

  "Error" - Request failed to complete.

  "Warning" - Request completes with non-fatal warnings.

  "Canceled" - Pending or inactive request is canceled.

  "Terminated" - Your request has been terminated.

- When a request is in phase ="Inactive", it can be one of these status:

  "Disabled" - This program is prevented from running.

  "On Hold" - You have placed a request on hold.

  "No Manager" - No manager has been defined to run your request.

Delete: Allows you to delete extract requests that have completed running as well as the Snapshot associated with them. You can only delete requests that have a phase of "Completed" (regardless of the Status).

Clicking the Delete button takes you to the Delete Confirmation-Warning screen. Click on the Cancel button to cancel delete action and go back to the Migrations: Extract screen. To proceed with the delete click the Apply button.

Download: Allows you to download and save the Snapshot on your desktop. You can only download Snapshots that have a phase of "Completed" and a status of "Normal".

The Download button launches a standard MS Windows' Save As pop-up window for you to select a destination on your desktop to save the file. The file is saved in a.zip format.

View Request Details: Clicking this button takes you to the View Request Details screen for the selected extract request.

7.2 Create Selection Set: Specify Selection Set Template

Figure 7–3 Create Selection Set: Specify Selection Set Template

Selection Set Template Table: This table displays the list of Selection Set templates. These Selection Sets are predefined for you. You can pick up one of the templates based on your migration needs.

Select: Allows you to select a template that you want to use as a starting point to create your Selection Set.

Template Name: Displays the name of the template.

Description: Displays description of the template.

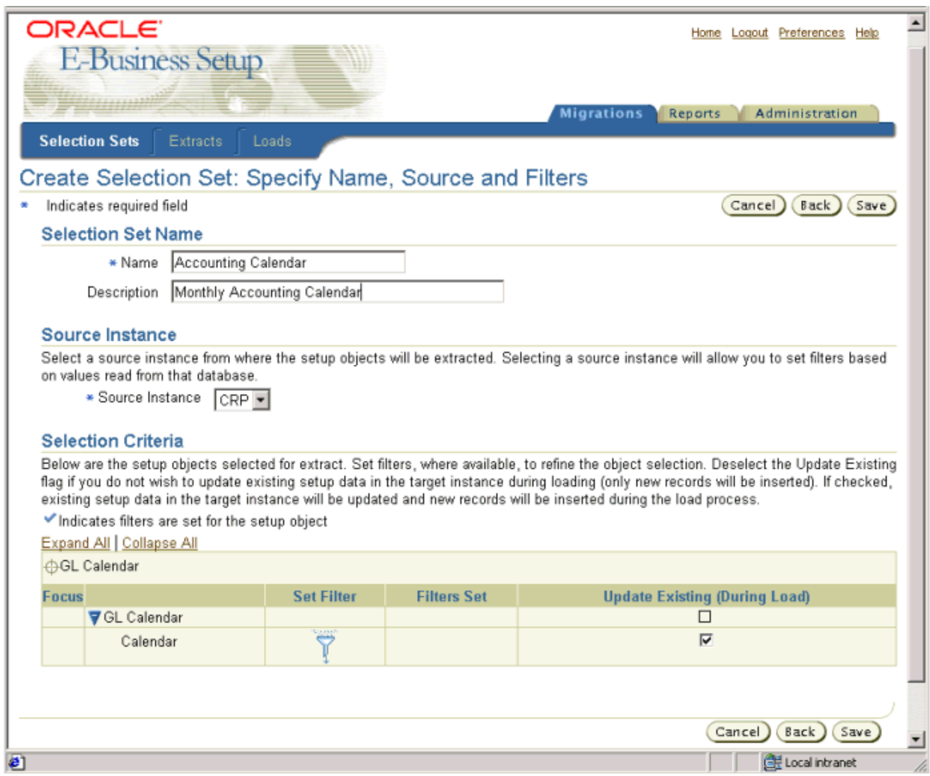
General Navigation

Cancel: Aborts current action and takes you back to the Migrations: Selection Set screen.

Continue: Clicking this button after selecting a template takes you to the Create Selection Set: Specify Name, Source and Filters screen.

7.3 Create Selection Set: Specify Name, Source and Filters

Figure 7–4 Create Selection Set: Specify Name, Source and Filters



Name: Allows you to enter a name for the Selection Set you are creating. The Selection Set name must be unique.

Description: Allows you to enter a description for your Selection Set. This is an optional field.

Source Instance: Allows you to select a source instance for extracting setup data. Values in the drop-down list are read from the list of instances mapped by you.

Once you select a source instance from the drop-down list, a connection is established with that remote database instance.

Selection Criteria Table: Displays a list of the setup objects selected for extract. The setup objects in this table are based on the Selection Set template you choose.

Expand All: Allows you to expand the complete tree of objects for the Selection Set.

Collapse All: Allows you to collapse the tree containing all the Selection Set.

Focus: Allows you to look at a particular section of the Selection Set.

Name: Displays the name of the setup object.

Set Filter: Allows you to set filters on individual objects. Only those setup objects that have a set filter icon can be filtered. Clicking this icon takes you to the Specify Source and Filters: Set Filter screen.

Filters Set: Indicates whether or not filters are set on a given setup object. If filters are set on the setup object, an information icon is displayed.

Update Existing (During Load): Allows you to specify an update action flag for the setup object. This flag is used while loading to determine whether or not the data for a setup object is to be overwritten if the same data already exists in the target database.

The check box for a setup object can be checked/unchecked or disabled. If checked, existing setup data in the target instance is updated. If unchecked, only new records are to be inserted and existing records are skipped.   If disabled, you cannot change the value.

General Navigation

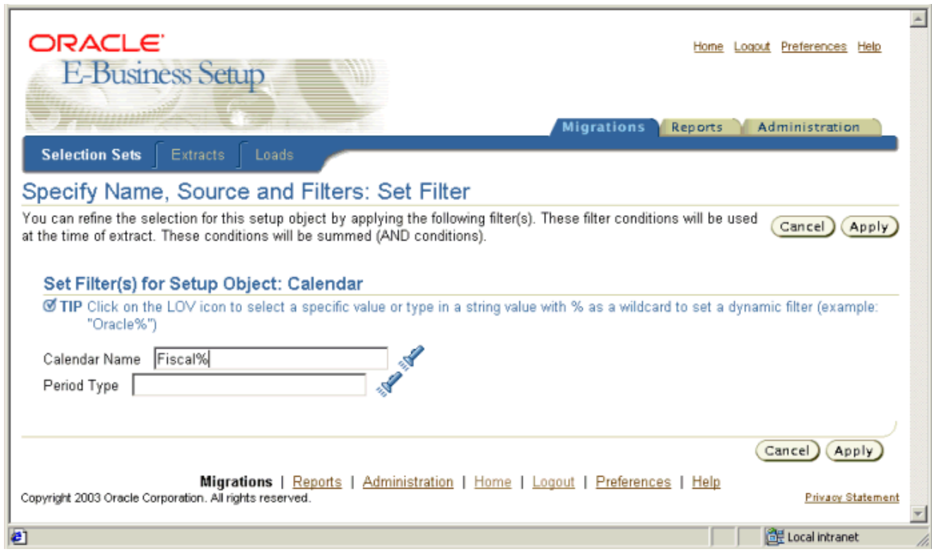
Cancel: Aborts current action and takes you back to the Migrations: Selection Set screen.

Save: Clicking this button saves the Selection Set you are creating and takes you back to the Migrations: Selection Set screen. In case of error, you get an error message. If it does not encounter any error, it takes you back to the Migrations: Selection Set screen.

Back: Takes you back to the Create Selection Set: Specify Selection Set Template screen.

7.4 Specify Name, Source and Filters: Set Filter

Figure 7–5 Specify Name, Source and Filters: Set Filter



Filterable Field Names: Based on the object for which you are trying to set the filter, Migrator displays the filterable fields. Thus list of filterable fields is different for different objects.

If the list of values icon is displayed next to the filterable field, you can click on this to select a record from the target database. This makes sure that you have set target value to an appropriate value based on the target database. Enter a new value if you do not want to look up into the target database, and want to create a new record. For more details refer to Search and Select: Set Filter.

General Navigation

Cancel: Takes you back to the Create Selection Set: Specify Name, Source and Filters screen.

Apply: Clicking this button saves the filters for the setup object and takes you back to Create Selection Set: Specify Name, Source and Filters.

7.5 Update Selection Set: Selection Criteria screen

Figure 7–6 Update Selection Set: Selection Criteria screen

Name: Displays the name of the Selection Set you have selected for update. You can change the name if you want.

Description: Displays description about the Selection Set you have selected for update. You can change the description if you want.

Created By: Displays the user name associated with the creation of this Selection Set.

Created On: Displays the creation date of the Selection Set.

Last Updated By: Displays the user name of the use who last updated this Selection Set.

Last Updated On: Displays the last update date for this Selection Set.

Source Instance: Displays the source instance from where you are extracting the setup data. Values in the drop-down list are displayed from the list of instance names mapped by you.

If you select a new source instance, a connection is established to the new instance. You are then prompted with a message: "If you have changed the source instance, some of your filters may not work as originally intended. Please review."

Selection Criteria Table: This table displays a list of the setup objects selected for extract. Setup objects displayed in this table are based on the Selection Set template that you chose.

Expand All: Allows you to expand the complete tree of objects for the Selection Set.

Collapse All: Allows you to collapse the tree containing all the Selection Set.

Focus: Allows you to look at a particular section of the Selection Set.

Name: Displays the name of the setup object.

Set Filter: Allows you to set filters on an individual object. Only those objects that can be filtered have a Set Filter icon. Clicking the Set Filter icon takes you to the Selection Criteria: Set Filter screen. For more details refer to Search and Select: Set Filter.

Filters Set: Indicates whether or not you have set filters on a given setup object. If filters are set on the setup object, check icon is displayed.

Update Existing (During Load): Allows you to specify an update action flag for the setup object. This flag is used while loading, to determine whether or not the data for a setup object is to be overwritten if the same data already exists in the target database.

The check box for a setup object can be checked/unchecked or disabled. If checked, existing setup data in the target instance is to be updated and new records are to be inserted during the load process. If unchecked, only new records are to be inserted and existing records are to be skipped.   If disabled, you cannot change the value.

General Navigation

Cancel: Takes you back to the Migrations: Selection Set screen.

Save: Clicking this button saves the Selection Set you are updating and takes you back to the Migrations: Selection Set screen.

Revie: Clicking this button runs a validation check for required fields. In case of error, you get an error message. If it does not encounter any error, it takes you to the Create Selection Set: Review Selection Criteria screen.

7.6 Update Selection Set: Review Selection Criteria

Figure 7–7 Update Selection Set: Review Selection Criteria

Selection Set Name: Displays the name of the Selection Set that is being reviewed.

Description: Displays description about the Selection Set that is being updated.

Selected Object Table: This table displays a list of the setup objects selected for extract. it also shows the filter condition set for each object.

Object Type: Displays the name of the setup object that are part of the Selection Set.

Category: Displays the name of folder that the setup object is grouped under.

Filters Set: Displays the description of the filters that you have set on the setup objects.

Update Existing (During Load): Displays the update action flag specified for the setup object. Values for the setup object are read from the Selection Set, the values are either “Yes” or “No”.

General Navigation

Cancel: Clicking this button aborts current action and takes you back to the Migrations: Selection Set screen.

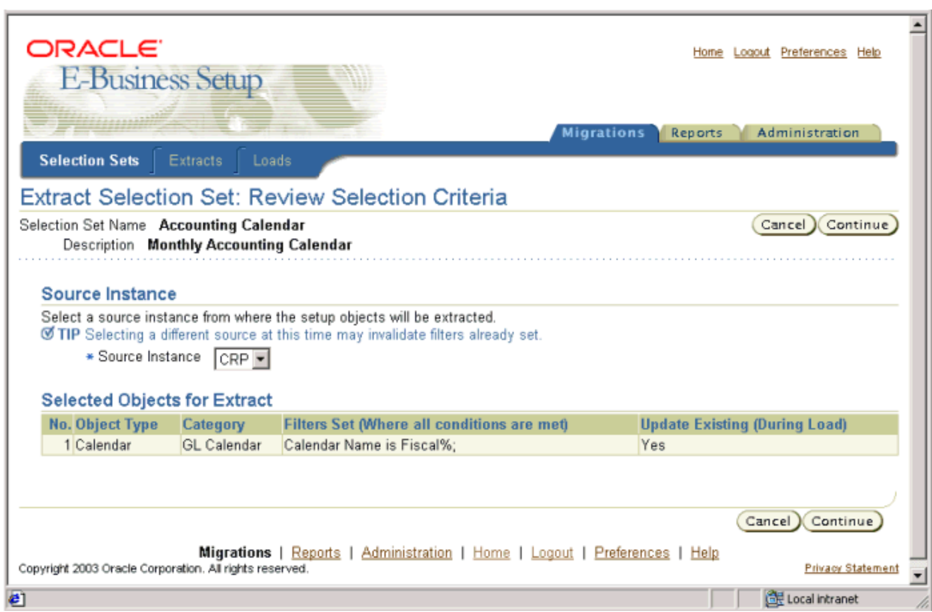
Back: Clicking this button takes you to the Update Selection Set: Selection Criteria screen.

Save: Clicking this button saves the Selection Set and takes you to the Migrations: Selection Set screen.

Save and Extract: Clicking this button saves the Selection Set and takes you to the Extract Selection Set: Submit Extract Request screen.

7.7 Extract Selection Set: Review Selection Criteria

Figure 7–8 Extract Selection Set: Review Selection Criteria



Selection Set Name: Displays name of the Selection Set you choose for the extract.

Description: Displays description about the Selection Set.

Source Instance: Displays the source instance specified by you to extract setup data. Values in the drop-down list are read from the list of instance names mapped by you.

Selected Objects for Extract Table: Displays name of the setup objects to be extracted. Values are read from the Selection Set. Only the selected objects are displayed.

Object Type: Displays the name of the setup object that are part of the Selection Set.

Category: Displays the name of folder that the setup object is grouped under.

Filters Set: Displays the description of the filters that you have set on the setup objects.

Update Existing (During Load): Displays the update action flag specified for the setup object. Values for the setup object are read from the Selection Set, the values are either “Yes” or “No”. setup object.

General Navigation

Cancel: Aborts current action and takes you back to the Migrations: Selection Set screen.

Continue: Takes you to the Extract Selection Set: Submit Extract Request screen.

7.8 Extract Selection Set: Submit Extract Request

Figure 7–9 Extract Selection Set: Submit Extract Request

Extract with Selection Set: Displays the name of the Selection Set that you chose for the extract.

Source Instance: Displays the source instance specified by you to extract setup data.

Snapshot Name: Allows you to enter a name for the Snapshot that is generated by the extract request. The name of the Snapshot must be unique. By default, the value for the field is "Selection Set Name_MMDDYYYY".

Run Request: Allows you to schedule your extract request.

Options include:

"As soon as possible" - selected by default

"As Scheduled... "- If you choose this option, you have to enter a day and time.

General Navigation

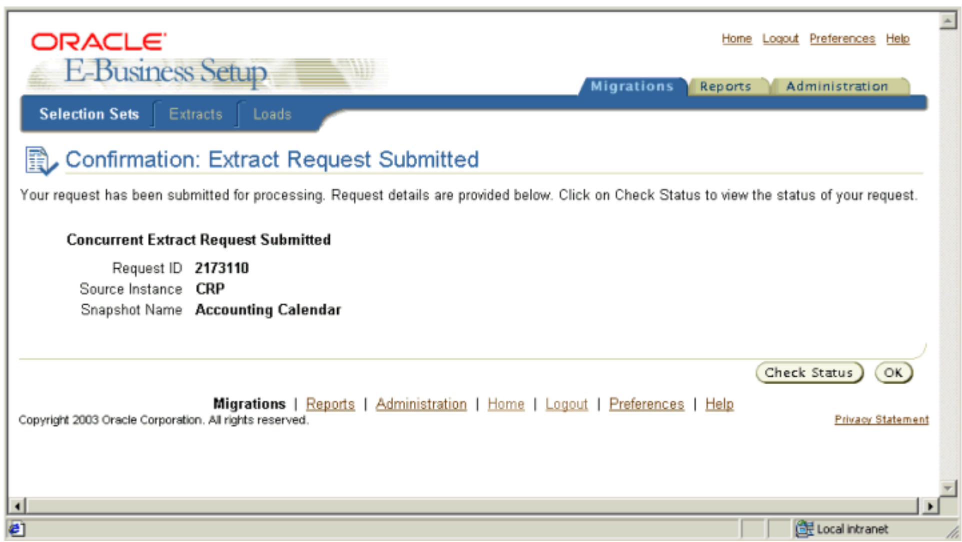
Cancel: Takes you to the Migrations: Extract screen.

Back: Takes you back to the Extract Selection Set: Review Selection Criteria screen.

Submit: Submits the extract request to the concurrent manager and takes you to a Confirmation: Extract Request Submitted screen. A validation check is run for the required fields. In case of error, you get an error message. If it does not encounter any error, it takes you to the next screen, Confirmation: Extract Request Submitted.

7.9 Confirmation: Extract Request Submitted

Figure 7–10 Confirmation: Extract Request Submitted



Request ID: Displays the Request ID that the concurrent manager assigns to the extract request.

Source Instance: Displays the source instance specified by you for extracting the setup data.

Snapshot Name: Displays the Snapshot Name that you specify while submitting the load request.

General Navigation

Check Status: Takes you to the View Request Details screen for this request.

OK: Takes you to the Migrations: Extract screen.

7.10 Viewing Request Details (For an Extract Request)

Figure 7–11 View Request Details (For an Extract Request)

Request ID: Displays the Request ID that the concurrent manager assigns to the extract request.

Source Instance: Displays the source instance specified by for extracting the setup data.

Snapshot Name: Displays the Snapshot name specified by you while submitting the extract request.

Submitted By: Displays the user name of the person submitting the extract request.

Submitted On: Displays submission date of the extract request.

Completed On: Displays completion date of the extract request. This field is blank if request is not complete.

Selection Set Used: Displays the Selection Set that is used for the extract request. The Selection Set displayed here is a copy of the original Selection Set used for the extract, with the Request ID appended at the end of the name.

Clicking the Selection Set Used button takes you to the Extract Selection Set: Review Selection Criteria screen. This screen is a Read-Only view of the Selection Set details.

Phase: Displays the phase of the request. Refer to Selection Sets for more details.

Status: Displays the status of the request. Refer to Selection Sets for more details.

Download Snapshot As…Allows you to save the Snapshot on your desktop. You can only download a Snapshot that has a phase of “Completed” and a status of “Normal”. This button is grayed out if request has not completed with “Normal” status.

General Navigation

Restart: Allows you to submit a new extract request with the same request parameters as the failed one. You can only restart a request with a phase of “Completed” and status of “Warning” or “Error”.

Clicking the Restart button submits a new extract request and takes you to the Confirmation: Extract Request Submitted screen. The new extract request has a new Request ID, but the same Selection Set, Snapshot Name and Source Instance.

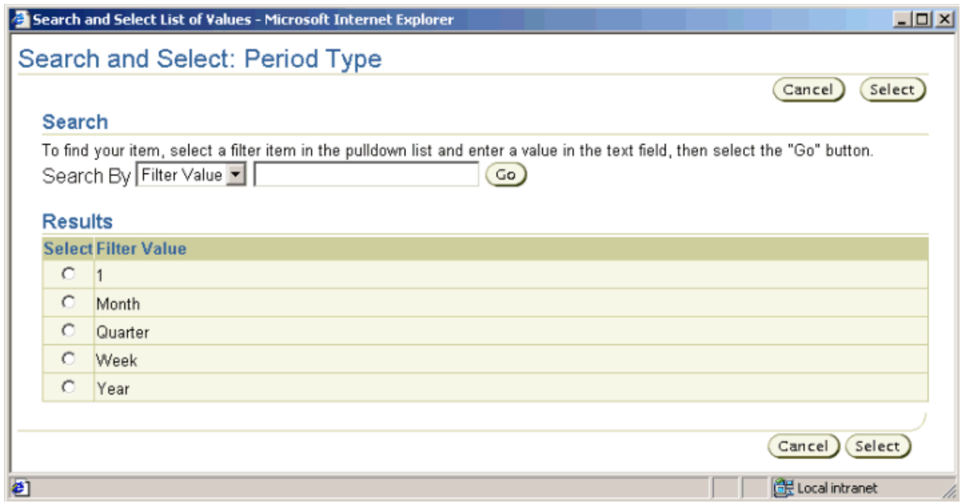
View Log: Clicking this button displays the log file generated by the concurrent manager. You can view the log file to monitor the progress of your extract request. In case your request ends with an “Error” status, view the log file to analyze the cause of the error.

Return to Migrations: Takes you to Migrations: Extract screen.

Refresh: Allows you to refresh the data displayed on this screen as your request is processed.

7.11 Search and Select: Set Filter

Figure 7–12 Search and Select: Set Filter



Search By: Enter the string by which you want to search the filter value. You can enter the search string using wild cards. If you want to get all the values read from the source instance you can leave the search string blank.

Go: Clicking on Go button gets the list of filter values as read from the source instance

Results Table: This table displays the list of values read from the source instance and matching your selection criteria.

Select: Allows you to select a value that you will filter on.

Filter Value: Displays list of values you can choose from. The filter value list matches your search criteria.

General Navigation

Cancel: Aborts the current process and takes you back to the Specify Name, Source and Filters: Set Filters screen.

Select: Accepts your chosen filter value for further action.

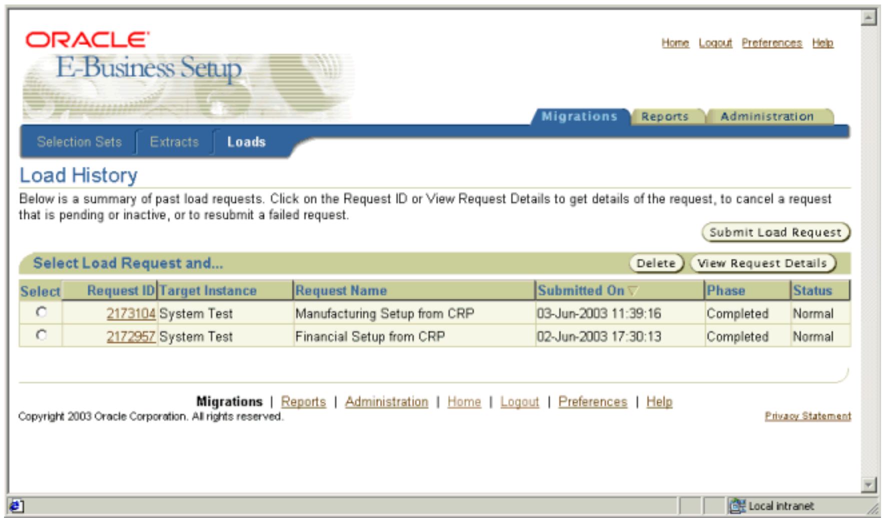
8

Loading Setup Data Screen Reference

This chapter contains in-depth explanation about the following screens:

8.1 Load History

Figure 8–1 Load History



Load History Table: This table displays the list of load requests that you have submitted in the past. You can only see your own load requests. The table displays 10 records at a time. Most recently submitted load requests are displayed first in the list. If you have not submitted any load requests, the table shows “No data exists”.

Select: Allows you to select a load request for further action.

Request ID: Displays the Request ID that the concurrent manager assigns to the load request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence. Clicking the Request ID button takes you to the View Request Details screen for the particular load request.

Target Instanc: Displays the target instance where you are loading setup data. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Request Name: Displays the name of the request as specified by the you while submitting the load request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Submitted On: Displays the submission date of the load request. By default, the Load History table is sorted by the submission date in descending order, the latest load submitted is shown first. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Phase: Displays the phase of the request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence. The following values are displayed in this field:

- “Completed” - Concurrent Manager has finished processing the request.
- “Inactive” - Request cannot be processed. This means concurrent manager on the source instance is down. Contact your system administrator to resolve this problem.
- “Pending” - Request has been submitted, but not picked up by a concurrent manager. You should continue to monitor the request.
- “Running” - Your request is running.

Status: Displays the status of the request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence. The following values are displayed in this field:

- When a request is in phase =”Pending”, it is in one of the following status:

  “Normal” - Request is ready and is to be picked up by the next manager.

  “Standby”- An incompatible program is running, so the request is in standby state.

  “Scheduled”- Your request is scheduled to run for a later date and time.

  “Waiting”- A specific request is waiting for another request, usually in the same request set.
- When a request is in phase = “Running”, it is in one of the following status:

  “Normal” - Process is running normally.

  “Paused” - A child request is waiting for the parent to finish. (Note: May not be necessary for Download).

  “Resuming” - Parent is restarting after child requests are finished.

  “Terminating” - Your request has been terminated.
- When a request is in phase =”Completed”, it is in one of the following status:

“Normal” - Everything went well.

“Error” - Request failed to complete.

“Warning” - Request completes with non-fatal warnings.

“Canceled” - Pending or inactive request is canceled.

“Terminated” - Your request has been terminated.

- When a request is in phase =”Inactive”, it is in one of the following status:

  “Disabled” - This request is prevented from running.

  “On Hold” - You have placed a request on hold.

  “No Manager” - No manager is available to run your request.

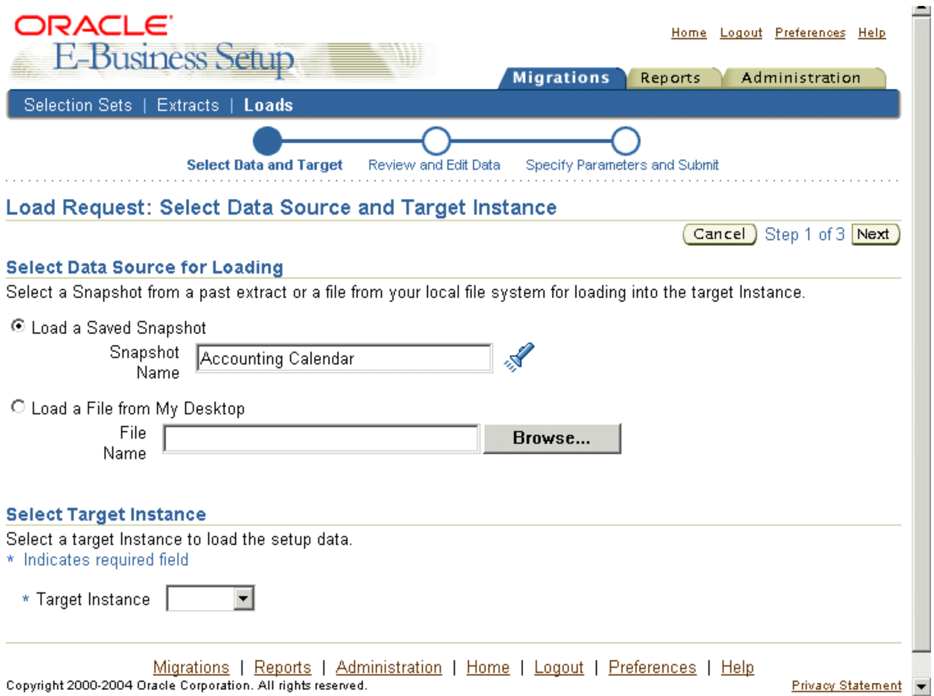
Submit Load Request: Clicking this button takes you to first step of the load process, the Load Request: Select Data and Target Instance screen.

View Request Details: Clicking this button takes you to the View Request Details screen for a particular load request.

Delete: Allows you to delete the selected Target instance. Clicking the Delete button takes you to the Delete Confirmation-Warning screen.

8.2 Load Request: Select Data Source and Target Instance

Figure 8–2 Load Request: Select Data Source and Target Instance



Locator Element: There are three steps in this process. You are currently on the first step Select Data and Target.

Data Source Options: Specify the source to read setup data for the load.

Available options are:

- "Load a Saved Snapshot"- Clicking on the Lookup icon opens a window where you can Search and Select the Snapshots that you have created in the current instance. Select the Snapshot that you want to load. Refer to "Search and Select: Snapshot Name" for more details.
- "Load a File from My Desktop" - Clicking on the Browse button launches a dialog box. From your desktop select a source.zip file that you want to load.

Target Instance: Allows you to specify the target instance in which you want to load the setup data. Values in the drop-down list are read from the list of instance names mapped by you.

General Navigation

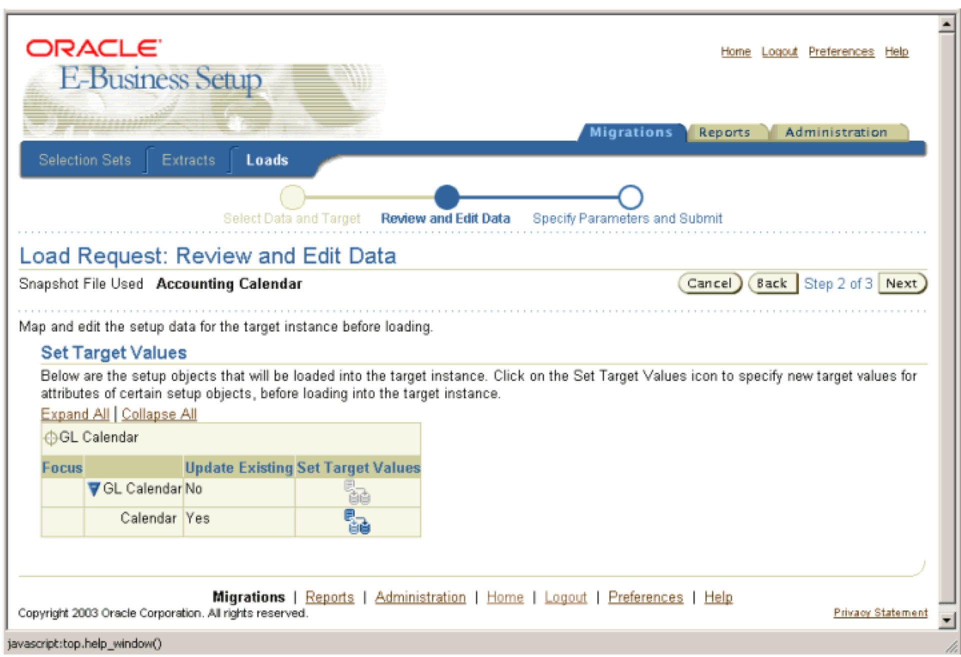
Cancel: Aborts current process and returns to previous screen, Migrations: Load.

Step 1 of 3: This is display-only text letting you know that you are on step1.

Next: This takes you to the next step in the load process. Clicking this button runs a validation check for the required fields. In case of error, you get an error message. If it does not encounter any error, it takes you to the Load Request: Review and Edit Data screen.

8.3 Load Request: Review and Edit Data

Figure 8–3 Load Request: Review and Edit Data



Locator Element: There are three steps in this process. You are currently on the second step Review and Edit Data.

Snapshot File Used: Displays the Snapshot name that you selected for this load.

Set Target Values Table: This table displays a list of the setup objects that will be loaded, as read from the Snapshot. Only objects contained in the Snapshot are displayed in this table.

Update Existing: Displays the update action flag specified on the setup object at the time of extract.

Set Target Values: Allows you to specify a new attribute value for the setup object. If you can edit the setup object attribute values then the icon is enabled. Clicking this icon takes you to the Load Request: Review and Edit Data: Set Target Values screen.

General Navigation

Cancel: Clicking this button aborts current process and takes you to Migrations: Load screen.

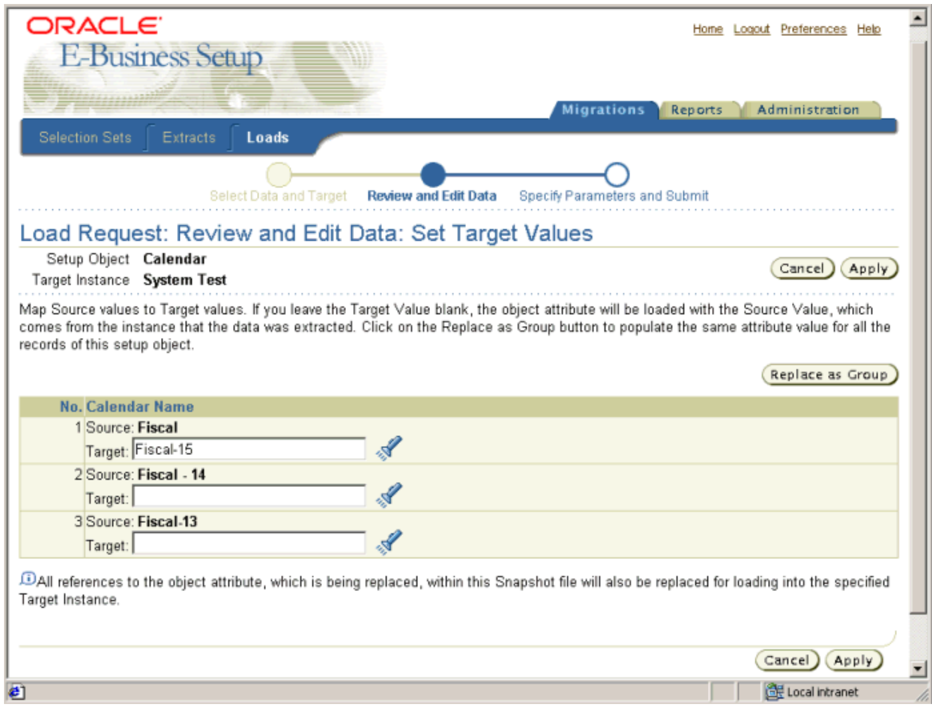
Step 2 of 3: This is display-only text letting you know that you are on step2.

Back: Clicking this button takes you back to step1. When you click the Back button the target values set by you on this screen, if any, will not be lost.

Next: Clicking this button runs a validation check on the required fields. In case of error, you get an error message. If it does not encounter any error, it takes you to the Specify Parameters and Submit screen, the next step in the load process.

8.4 Load Request: Review and Edit Data: Set Target Values

Figure 8–4 Load Request: Review and Edit Data: Set Target Values



Locator Element: There are three steps in this process. You are currently on the second step Review and Edit Data.

Setup Object: Displays the name of the setup object that you are setting target values for.

Target Instance: Displays the name of the target instance in which you are loading the setup data.

Source Values to Target Values Table: This table displays the list of fields for which you can set a new value before loading in the target instance. This table also displays the source value for each occurrence of the field. If you want to replace the value based on an existing value in the target instance, use the list of values icon next to each field. Otherwise you can type your new value directly in the field. For details refer to Search and Select: Target.

Replace as Group: Allows you to perform a global replace of the same target value for all the records of a given setup object. Clicking this button takes you to the Set Target Values: Replace as Group screen.

General Navigation

Cancel: Aborts the current process and returns to the Load Request: Review and Edit Data screen.

Apply: Clicking the button saves the new values set by you, if any, and takes you back to the Load Request: Review and Edit Data screen.

8.5 Set Target Values: Replace as Group

Figure 8–5 Set Target Values: Replace as Group

Locator Element: There are three steps in this process. You are currently on the second step Review and Edit Data.

List of Attributes and Input fields: Only the attributes that you can edit or set new values for are displayed.

General Navigation

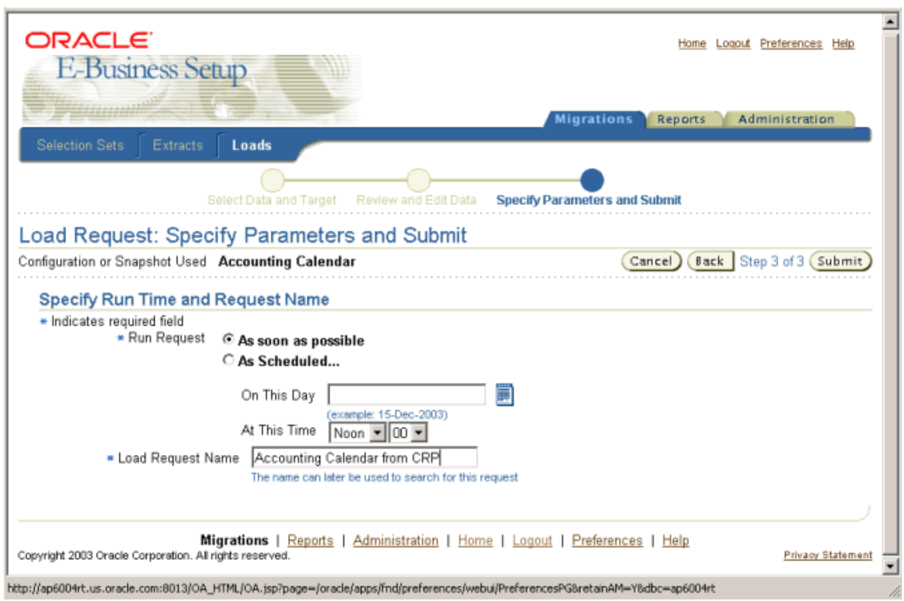
Cancel: Aborts the current process and takes you to the Load Request: Review and Edit Data: Set Target Values.

Apply: Takes you back to the Set Target Values screen and populates all the records in the table with the same attribute target value as specified in the Replace as Group screen.

When you are back on the Set Target Values screen, you are still able to edit the target values you just mass replaced.

8.6 Load Request: Specify Parameters and Submit

Figure 8–6 Load Request: Specify Parameters and Submit



Locator Element: There are three steps in this process. You are currently on the third step Specify Parameters and Submit.

Snapshot File: Displays the Snapshot name or Snapshot File that you have selected for the load.

Run Request: Lets you specify when you want to run the load request.

Options include:

- "As soon as possible" - Selected by default.
- "As Scheduled..." - If you choose this option, you must enter a day and time.

Load Request Name: Allows you to specify a name for the load request. By default, the Load Request Name is "<Data Source Name>_MMDDYYYY".

General Navigation

Cancel: Aborts current process and takes you to Migrations: Load screen.

Back: Takes you back to the Load Request: Review and Edit Data screen.

Step 3 of 3: This is display-only text letting you know that you are on step3.

Submit: Clicking this button lets you submit the load request to the concurrent manager and takes you to the Confirmation: Load Request Submitted screen.

A validation check is run for required fields. In case of error, you get an error message. If it does not encounter any error, it takes you to the next screen, Confirmation: Load Request Submitted.

8.7 Confirmation: Load Request Submitted

Figure 8–7 Confirmation: Load Request Submitted

Request ID: Displays the Request ID that the concurrent manager assigns to the load request.

Target Instance: Displays the name of the target instance to which you are loading the setup data.

Load Request Name: Displays the load request name specified by you while submitting the load.

General Navigation

Check Status: Clicking this button takes you to the next screen View Request Details screen for this request.

OK: Clicking this button takes you to the Migrations: Load screen.

8.8 View Request Details (For a Load Request)

Figure 8–8 View Request Details (For a Load Request)

Request ID: Displays the Request ID that the concurrent manager assigns to the load request.

Target Instance: Displays the name of the target instance chosen by you for loading the setup data.

Load Request Name: Displays the load request name specified by you while submitting the load request.

Snapshot File Used: Displays the Snapshot name or Snapshot File name that is selected for this load.

Submitted By: Displays the user name of the person submitting the load request.

Submitted On: Displays submission date of the load request.

Completed On: Displays completion date of the load request.

Scheduled to Run: Displays the scheduled run time for the load request.

Phase: Displays the phase of the request

Status: Displays the status of the request.

Message: Displays a user-friendly status message.

General Navigation

Refresh: Allows you to refresh the data displayed on this screen as your request is processed.

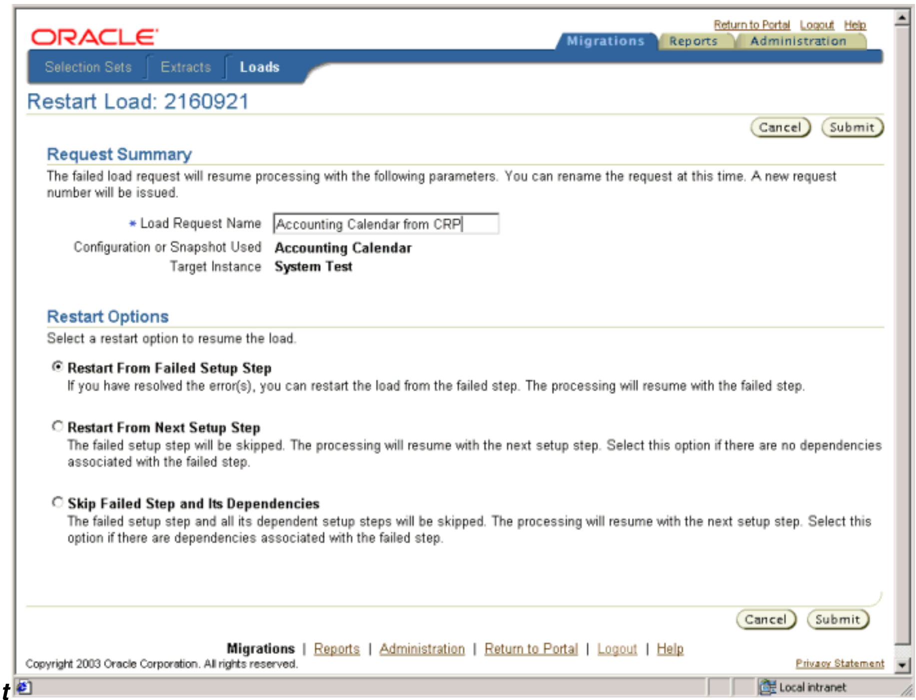
Restart: Allows you to restart a failed load request. You can only restart a request with a phase of “Completed” and status of “Warning” or “Error”. Clicking this button takes you to the Restart Load screen.

View Log: Clicking this button displays the log file generated by the concurrent manager. You can view the log file to monitor the progress of your report request. In case your request ends with an “Error” status, view the log file to analyze the cause of the error.

Return to Migrations: Load: Takes you to Migrations: Load screen.

8.9 Restart Load

Figure 8–9 Restart Load



Target Instance: Displays the name of the target instance that you choose for loading the setup data.

Load Request Name: Displays the load request name specified by you while submitting the load request. This field is editable

Snapshot File Used: Displays the Snapshot name or Snapshot File name used for the load.

Restart Options: Allows you to specify a restart option to resume the load.

Options that you can select from are:

- "Restart From Failed Setup Step" - Selected by default. This assumes that you have fixed the problem and the request is to resume from the failed step.
- "Restart From Next Setup Step" - The failed setup step is skipped. The request resumes from the next step.

- “Skip Failed Step and Its Dependencies “- The failed step and its dependent steps are skipped. The request resumes at the next non-dependent step.

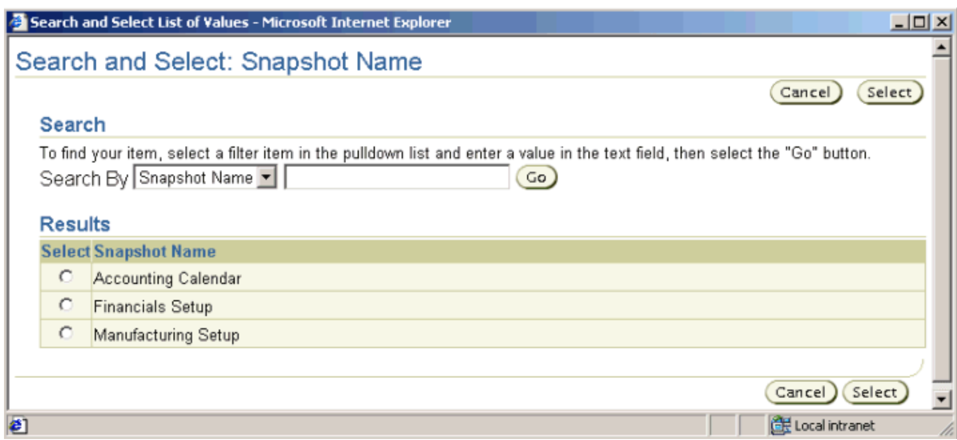
General Navigation

Cancel: Aborts the current action and takes you back View Request Details screen.

Submit: Clicking this button submits a new load request and takes you to the Confirmation: Load Request Submitted screen. The new load request has a new Request ID.

8.10 Search and Select: Snapshot Name

Figure 8–10 Search and Select: Snapshot Name



Search By: Enter the string by which you want to search the Snapshot. You can enter the search string using wild cards. If you want to get all the Snapshot you can leave the search string blank.

Go: Clicking on Go button gets the list of Snapshot for your user name, and matching your search criteria.

Results Table: This table displays the list of Snapshot created by you and matching your selection criteria.

Snapshot Name: Displays list of Snapshot you can choose from. The Snapshot list matches your search criteria.

Select: Allows you to select a Snapshot that you want to use to report on.

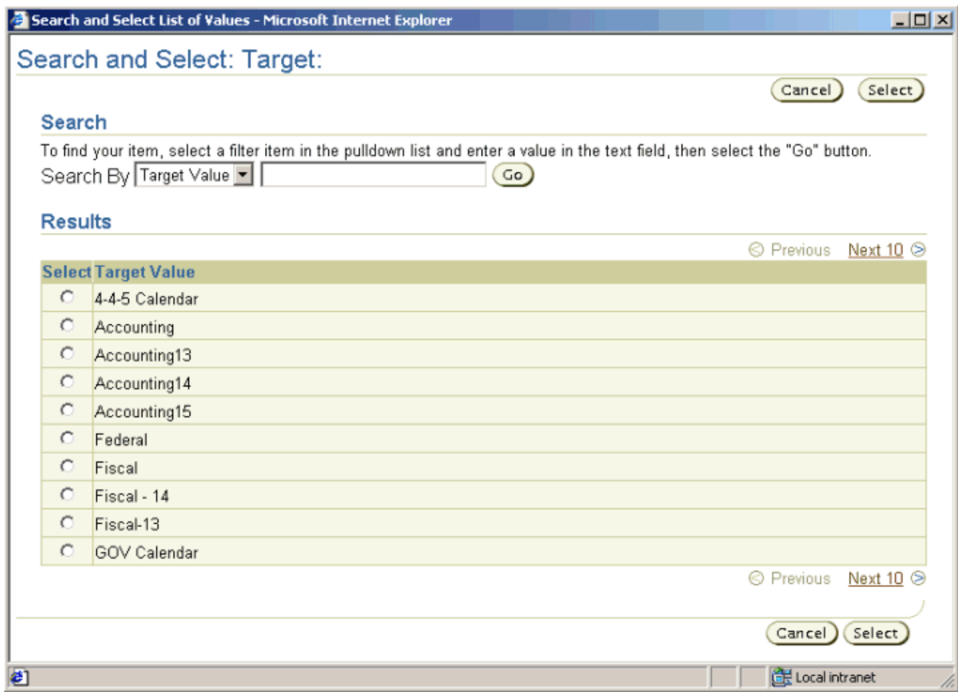
General Navigation

Cancel: Aborts the current process.

Select: Selects your chosen Selection Set for the load.

8.11 Search and Select: Target

Figure 8–11 Search and Select: Target



Search By: Enter the string by which you want to search the target value. You can enter the search string using wild cards. If you want to get all the target values you can leave the search string blank.

Go: Clicking on Go button gets the list of target values matching your search criteria.

Results Table: This table displays the list of target values matching your selection criteria.

Select: Allows you to select a target value for further action.

Target Value: Displays the list of target values matching your selection that you can chose from.

General Navigation

Cancel: Aborts the current process and takes you back to the Load Request: Select Data Source and Target Instance screen.

Select: Selects your chosen target value for the load.

9

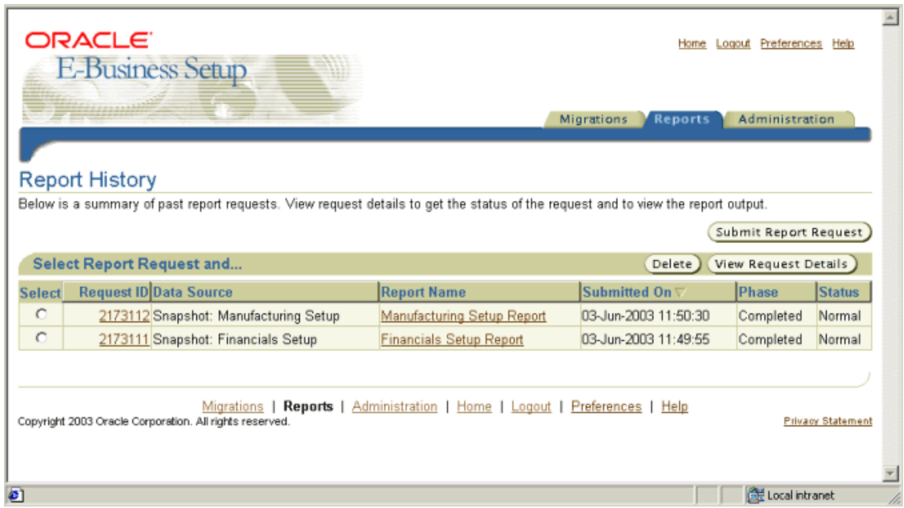
Generating Reports Screen Reference

This chapter contains in-depth explanation about the following screens:

- Report History
- Report Request: Specify Data Source
- Report Request: Specify Parameters and Submit
- Confirmation: Report Request Submitted
- View Request Details <Request ID>
- iSetup Report <Report Name>

9.1 Report History

Figure 9–1 Report History



Report History Table: This Table displays the report requests that you have submitted in the past. You can only see your own report requests. The table displays 10 records at a time. If you have not submitted any report requests, the table shows “No data exists”.

Select: Allows you to select a Report for further action.

Request ID: Displays the Request ID that the concurrent manager assigns to the report request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Data Source: Displays the source of the data that you selected for your report. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Based on the data source type you select, the value displayed has one of the following formats:

- "Snapshot”: <Snapshot Name>
- "File”: /path/…/<filename.zip>

Report Name: Displays the name of the report specified by you while submitting the report request. If request Phase is “Completed” and Status is “Normal”, the report name is a link that takes you to the Report Index screen for that report. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Submitted On: Displays the report request submission date and time. By default, the Report History table is sorted by submitted on date, in descending order (i.e. the latest report submitted is shown first). You can always click back on the column header to re-sort by that column.

Phase: Displays the phase of the request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

Status: Displays the status of the request. You can click on the column header to sort the table based on the values in this column. Sorting is done in alternating ascending or descending sequence.

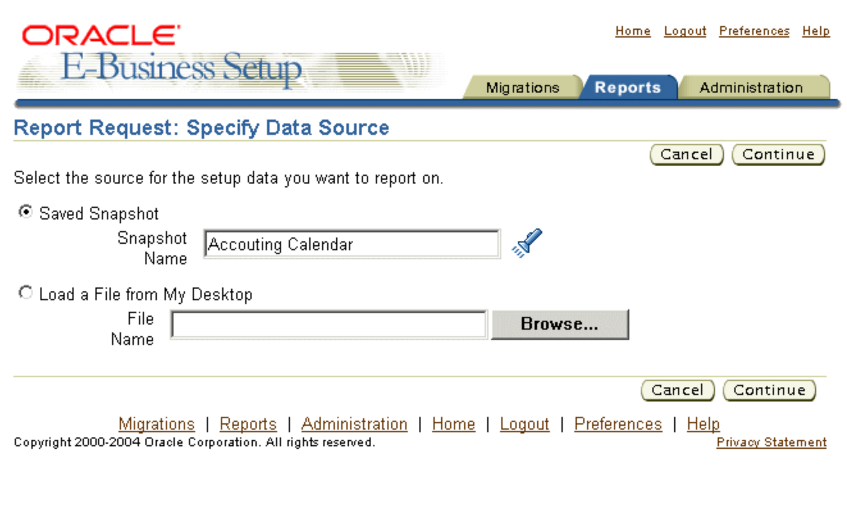
Submit Report Request: Allows you to submit a new report request. Clicking this button takes you to the first step of the submit report request process, the Report Request: Specify Data Source screen.

Delete: Allows you to delete a report that you selected.

View Request Details: Takes you to the View Request Details screen.

9.2 Report Request: Specify Data Source

Figure 9–2 Report Request: Specify Data Source



Data Source Options: Allows you to specify the source to read setup data for the report.

Available options are:

- "Load a Saved Snapshot"- Clicking on the Lookup icon opens a window where you can Search and Select the Snapshot that you have created in the current instance. Select the Snapshot that you want to report on. For details refer to Search and Select: Snapshot Name, Loading Setup Data Screen Reference chapter.
- "Load a File from My Desktop" - Clicking on the Browse button launches a dialog box. From your desktop select a source.zip file that you want to report on.

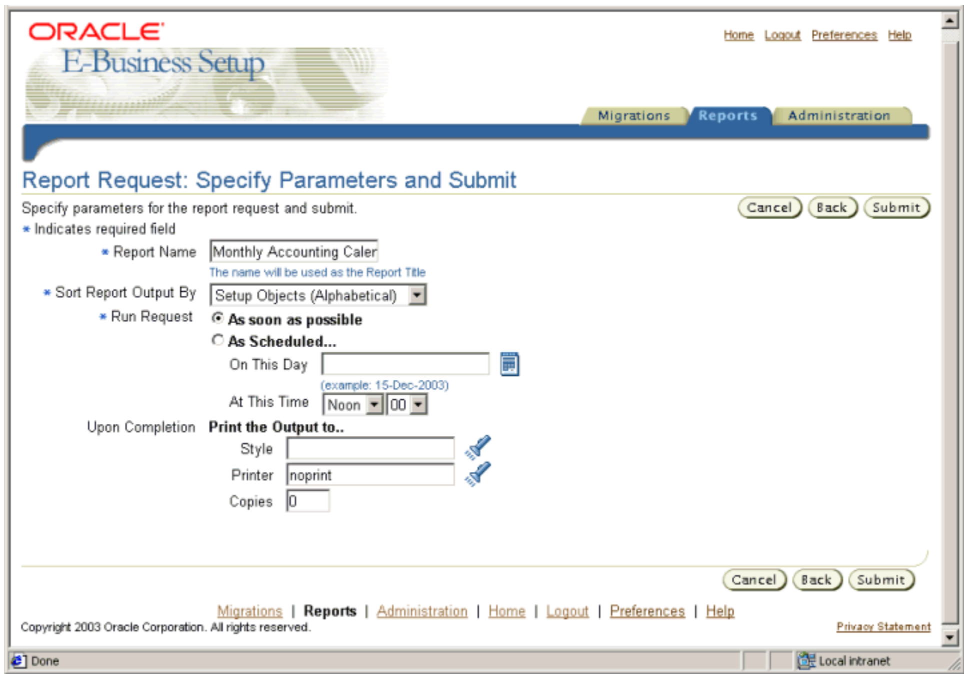
General Navigation

Cancel: Aborts current process and returns to Reports main screen.

Continue: Takes you to the next step of the report submission process. Clicking this button runs a validation check for the required fields. In case of error, you get an error message. If it does not encounter any error, it takes you to the Report Request: Specify Parameters and Submit screen.

9.3 Report Request: Specify Parameters and Submit

Figure 9–3 Report Request: Specify Parameters and Submit



Report Name: Lets you to specify a name for the report. This name need not be unique. The value entered in this field is displayed as header information on the HTML Report output.

Sort Report Output By: Allows you to specify a sorting order for the report output. The values in the drop-down list include:

- "Setup Objects (Alphabetical)" - Selected by default. This option lists all the setup objects in alphabetical order.
- "Product Module (Alphabetical)" - This option groups the setup objects by product such as General Ledger, Cash Management, Human Resources, etc., and then sorts the setup objects alphabetically within each product.

Note: There is no record sorting in the reports. The record details are presented as they are read from the file or database.

Run Request: Allows you to specify when you want to run the report request.

Options include:

- "As soon as possible" - selected by default.
- "As Scheduled..." - If you choose this option, you have to enter a day and time.

Upon Completion… Print the Output to… : Allows you to specify whether or not you want to automatically print the complete report output once the request has completed successfully.

To setup the print request, you must enter values for the following three standard Concurrent Request Manager:

- "Style" = By default, this field is blank.
- "Printer"= By default, the value is "noprint". The list of values are dependent on the Style that you select.
- "Copies" = You can enter the number of copies they want to print. By default, the value is "0".

General Navigation

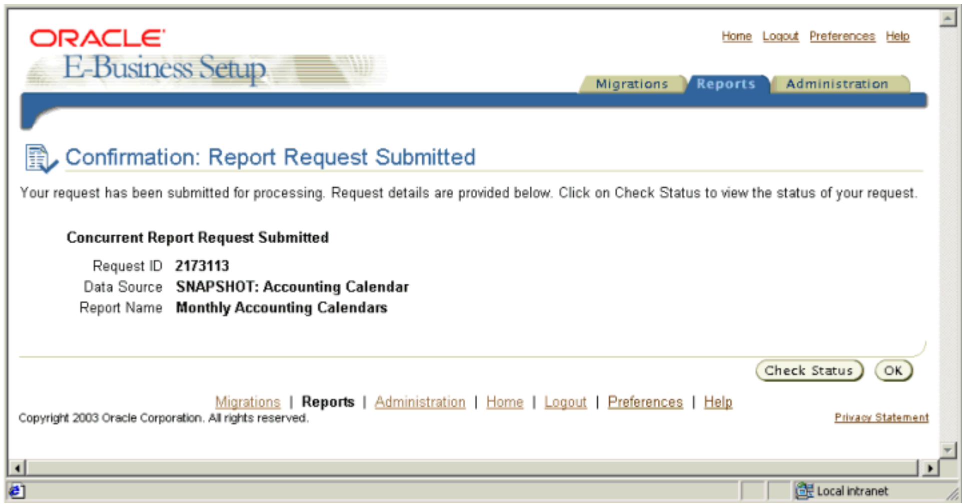
Cancel: Aborts current process and takes you to the Reports main screen.

Back: Takes you back to the Report Request: Specify Data Source screen.

Submit: Submits the report request to the concurrent manager and takes you to a confirmation screen. Clicking this button runs a validation check for required fields. In case of error, you get an error message. If it does not encounter any error it takes you to the Confirmation: Report Request Submitted screen.

9.4 Confirmation: Report Request Submitted

Figure 9–4 Confirmation: Report Request Submitted



Request ID: Displays the Request ID that the concurrent manager assigns to the report request.

Data Source: Displays the source of the data that you have selected. Based on the data source type you select, the value displayed has one of the following formats:

- "Snapshot file from current instance" = Snapshot: <Snapshot Name>
- "Snapshot file from desktop" = //path/.../<filename.zip>

Report Name: Displays the report name as specified by you while submitting the report request.

General Navigation

Check Status: Clicking this button takes you to the View Request Details screen for this request.

OK: Clicking this button takes you to the Reports main screen.

9.5 View Request Details <Request ID>

Figure 9–5 View Request Details <Request ID>

Request ID: Displays the Request ID that the concurrent manager assigns to the report request.

Data Source: Displays the data source from which the report is to be created.

Report Name: Displays the name of the report as specified by the you while submitting the report request.

Submitted By: Displays the user name of the person who submitted the report request.

Submitted On: Displays submission date and time of the report request.

Completed On: Displays the completion date and time of the report request.

Phase: Displays the phase of the request.

Status: Displays the status of the request.

General Navigation

Refresh: Allows you to refresh the data displayed on this screen.

View Log: Clicking this button displays the log file generated by the concurrent manager. You can view the log file to monitor the progress of your report request. In case your request ends with an "Error" status, view the log file to analyze the cause of the error.

View Output: Clicking this button takes you to the Report Index screen where you can select a report for a specific setup object.The report output is generated only if the request has completed successfully (when Phase is "Completed" and Status is "Normal").

Return to Reports: Takes you to the Reports main screen.

9.6 iSetup Report <Report Name>

Figure 9–6 iSetup Report: Report Index

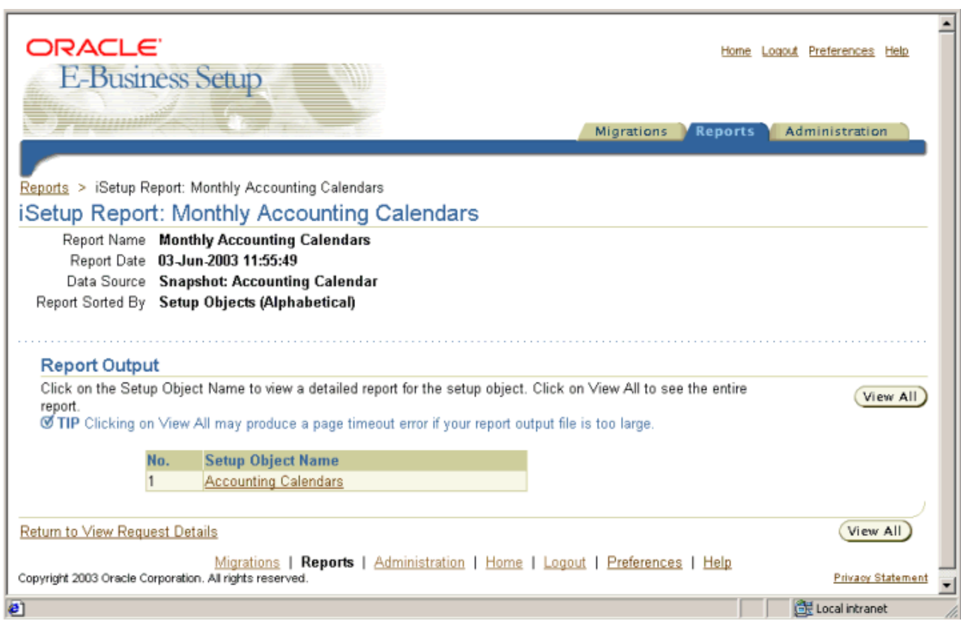


Figure 9–7 iSetup Report: <Report Name>

Report Name: Displays the report name specified by you while submitting the report request.

Report Date: Displays the date and time the report was created. These values are taken from system date and time, when your report request completed. Format for this field is “<DD-Mon.-YY> <hh:mm> <AM or PM>”

Data Source: Displays the data source specified by you while submitting the report request.

Setup Object Name: This link takes you to the individual report.

Report Sorted by: Displays the Sort Report Output By value, specified by you while submitting the report request.

General Navigation

Return to View Request Details: Takes you back to the View Request Details screen.

View All: Clicking this button takes you to a complete plain text report containing all the setup objects contained in the Snapshot file. The setup objects are listed in the order the report is sorted.

A

Contents of Snapshot or a Snapshot File

A.1 Overview

The Snapshot or Snapshot File are in a compressed file format (*.zip). They include the Driver File and Template File.

The Driver File specifies the APIs that need to run along with the corresponding Template File. The load program selects APIs from the Driver File in the required sequence. The Driver File sequence does not reflect the sequence in which the APIs are called during the load.

A.2 Driver File

The driver.xml File tells the load program which APIs need to be called and with which template File. The Template File provides the parameters required for each API.

Below is an example of contents of a driver file.

```
<?xml version="1.0" encoding="UTF-8" ?>
<driver>
 <api name="AP_APReportingEntity" insert_mode="INCLUSIVE_INSERT">
  <template>AP_APReportingEntity_0.xml</template>
 </api>
 <api name="AP_APSetup" insert_mode="INCLUSIVE_INSERT">
  <template>AP_APSetup_1.xml</template>
 </api>
 <api name="AP_AgingPeriods" insert_mode="INCLUSIVE_INSERT">
  <template>AP_AgingPeriods_2.xml</template>
 </api>
 <api name="AP_BankAcct" insert_mode="INCLUSIVE_INSERT">
  <template>AP_BankAcct_3.xml</template>
 </api>
```

```
 <api name="AP_DistributionSets" insert_mode="INCLUSIVE_INSERT">
  <template>AP_DistributionSets_4.xml</template>
 </api>
 <api name="AP_InvTolerance" insert_mode="INCLUSIVE_INSERT">
  <template>AP_InvTolerance_5.xml</template>
 </api>
 <api name="AP_InvoiceApproval" insert_mode="INCLUSIVE_INSERT">
  <template>AP_InvoiceApproval_6.xml</template>
 </api>
 <api name="AP_PayablesOption" insert_mode="INCLUSIVE_INSERT">
  <template>AP_PayablesOption_7.xml</template>
 </api>
 <api name="AP_PaymentFormats" insert_mode="INCLUSIVE_INSERT">
  <template>AP_PaymentFormats_8.xml</template>
 </api>
.
.
.
.
</driver>
```

A.3 Template File

The Template Files can be either ldt or xml files. The Template Files contain setup parameters as they are configured in the instance from where the extract has been taken.

Below is an example of contents of a template file.

```
<?xml version="1.0" encoding="UTF-8" ?>
 <PayablesOptionAM ID="BE" MIN_API_VERSION="115.7" MIN_API_PATCH="2695475 -
ISETUP: FINANCIALS CONSOLIDATED PATCH FOR 11.5.9">
 <SystemParametersVO ID="VIEW">
 <SystemParametersVO>
  <BaseCurrencyCode>GBP</BaseCurrencyCode>
  <RecalcPayScheduleFlag>N</RecalcPayScheduleFlag>
  <AutoCalculateInterestFlag>N</AutoCalculateInterestFlag>
  <InvoiceCurrencyCode>GBP</InvoiceCurrencyCode>
  <PaymentCurrencyCode>GBP</PaymentCurrencyCode>
  <CheckOverflowLookupCode>VOID EXCEPT LAST</CheckOverflowLookupCode>
  <PayDateBasisLookupCode>DUE</PayDateBasisLookupCode>
  <ApplyAdvancesDefault>Y</ApplyAdvancesDefault>
  <AddDaysSettlementDate />
  <CostOfMoney />
  <DaysBetweenCheckCycles />
```

```
<FederalIdentificationNum />
<CreateEmployeeVendorFlag>Y</CreateEmployeeVendorFlag>
<EmployeePayGroupLookupCode>Employee</EmployeePayGroupLookupCode>
<EmployeePaymentPriority>99</EmployeePaymentPriority>
<ConfirmDateAsInvNumFlag>Y</ConfirmDateAsInvNumFlag>
<UpdatePaySiteFlag>N</UpdatePaySiteFlag>
<MakeRateMandatoryFlag>Y</MakeRateMandatoryFlag>
<MultiCurrencyFlag>Y</MultiCurrencyFlag>
<GlDateFromReceiptFlag>I</GlDateFromReceiptFlag>
<DiscIsInvLessTaxFlag>Y</DiscIsInvLessTaxFlag>
<MatchOnTaxFlag />
<AccountingMethodOption>Accrual</AccountingMethodOption>
<ReplaceCheckFlag>N</ReplaceCheckFlag>
<OnlinePrintFlag>N</OnlinePrintFlag>
<EftUserNumber />
<MaxOutlay />
<VendorPayGroupLookupCode>Government</VendorPayGroupLookupCode>
<RequireTaxEntryFlag>N</RequireTaxEntryFlag>
<ApprovalsOption>BOTH</ApprovalsOption>
<PostDatedPaymentsFlag>N</PostDatedPaymentsFlag>
<SecondaryAccountingMethod />
<TakeVatBeforeDiscountFlag />
<InterestToleranceAmount />
<TermsDateBasis>Invoice</TermsDateBasis>
<AllowFuturePayFlag>N</AllowFuturePayFlag>
<AutoTaxCalcFlag>T</AutoTaxCalcFlag>
<AutomaticOffsetsFlag>N</AutomaticOffsetsFlag>
<LiabilityPostLookupCode />
<LiabilityPostOption />
<DiscountDistributionMethod />
<CombinedFilingFlag>N</CombinedFilingFlag>
<IncomeTaxRegion />
<IncomeTaxRegionFlag />
<HoldUnmatchedInvoicesFlag>N</HoldUnmatchedInvoicesFlag>
<AllowDistMatchFlag>Y</AllowDistMatchFlag>
<AllowFinalMatchFlag>Y</AllowFinalMatchFlag>
<AllowFlexOverrideFlag>Y</AllowFlexOverrideFlag>
<AllowPaidInvoiceAdjust>N</AllowPaidInvoiceAdjust>
<UssglTransactionCode />
<UssglTrxCodeContext />
<InvDocCategoryOverride>N</InvDocCategoryOverride>
<PayDocCategoryOverride>N</PayDocCategoryOverride>
<VendorAutoIntDefault />
<SummaryJournalsDefault>N</SummaryJournalsDefault>
<TransferDescFlexFlag>Y</TransferDescFlexFlag>
```

```
<AllowAwtFlag>Y</AllowAwtFlag>
<AllowAwtOverride>N</AllowAwtOverride>
<CreateAwtDistsType>PAYMENT</CreateAwtDistsType>
<CreateAwtInvoicesType>PAYMENT</CreateAwtInvoicesType>
<AwtIncludeDiscountAmt>Y</AwtIncludeDiscountAmt>
<AwtIncludeTaxAmt>N</AwtIncludeTaxAmt>
<ReconAccountingFlag>Y</ReconAccountingFlag>
<AutoCreateFreightFlag>N</AutoCreateFreightFlag>
<AllowSupplierBankOverride>N</AllowSupplierBankOverride>
<UseMultipleSupplierBanks>N</UseMultipleSupplierBanks>
<AutoTaxCalcOverride>Y</AutoTaxCalcOverride>
<AmountIncludesTaxFlag>Y</AmountIncludesTaxFlag>
<AmountIncludesTaxOverride>Y</AmountIncludesTaxOverride>
<UseBankChargeFlag>N</UseBankChargeFlag>
<BankChargeBearer />
<RoundingErrorPostOption />
<TaxFromPoFlag>Y</TaxFromPoFlag>
<TaxFromVendorSiteFlag>Y</TaxFromVendorSiteFlag>
<TaxFromVendorFlag />
<TaxFromAccountFlag>Y</TaxFromAccountFlag>
<TaxFromSystemFlag>Y</TaxFromSystemFlag>
<TaxFromInvHeaderFlag>Y</TaxFromInvHeaderFlag>
<TaxFromTemplateFlag>Y</TaxFromTemplateFlag>
<TaxHierPoShipment>1</TaxHierPoShipment>
<TaxHierVendor />
<TaxHierVendorSite>3</TaxHierVendorSite>
<TaxHierAccount>2</TaxHierAccount>
<TaxHierSystem>6</TaxHierSystem>
<TaxHierInvoice>5</TaxHierInvoice>
<TaxHierTemplate>4</TaxHierTemplate>
<EnforceTaxFromAccount />
<MrcBaseCurrencyCode />
<MrcSecondarySetOfBooksId />
<MatchOption />
<GainLossCalcLevel>PAYMENT LINE</GainLossCalcLevel>
<WhenToAccountPmt>ALWAYS</WhenToAccountPmt>
<WhenToAccountGainLoss />
<FutureDatedPmtAcctSource>BANK ACCOUNT</FutureDatedPmtAcctSource>
<FutureDatedPmtLiabRelief>ISSUE</FutureDatedPmtLiabRelief>
<GlTransferAllowOverride>Y</GlTransferAllowOverride>
<GlTransferProcessDays />
<GlTransferMode />
<GlTransferSubmitJournalImp>Y</GlTransferSubmitJournalImp>
<IncludeReportingSob />
<SetOfBooksName>Set Of Books Name</SetOfBooksName>
```

```
  <OrgName>Organization Name</OrgName>
  <BusinessGroupName>Business Group Name</BusinessGroupName>
  <DefaultAwtGroupName>CIT</DefaultAwtGroupName>
  <SecondarySetOfBooksName />
  <BankAccountName />
  <ExpenseReportType>Travel & Accommodation</ExpenseReportType>
  <TermsName />
  <EmployeeTermsName>Immediate</EmployeeTermsName>
  <PrepaymentTermsName>Immediate</PrepaymentTermsName>
.
.
.
  </SystemParametersVO>
.
.

.
.
  </SystemParametersVO>
  </SystemParametersVO>
  </PayablesOptionAM>
```

B

DBC File Information

B.1 Overview

DBC File is a file required on your current system to communicate with a remote database. The Migrator Central Instance should have DBC file for the source and target instance. Each of the source and target instance should have the DBC file for the migrator central instance.

B.2 DBC File

DBC File is a file required on your current system to communicate with a remote database. The Migrator Central Instance should have DBC file for the source and target instance. Each of the source and target instance should have the DBC file for the migrator central instance.

To create a DBC file you can use template DBC file

($FND_TOP/secure/template.dbc) to create the DBC for the source and target databases.

Alternatively, you can generate this file using the AdminAppServer tool. This is a java utility that you can run from the command line. The Oracle Applications System Administrator's Guide contains instructions to use this tool.

For details of the content of the dbc file, please refer to Oracle Applications System Administrator's Guide.

C

Selection Set for iSetup Migrator

C.1 Setup Object List

Below is the list of setup objects that users will be able to extract and Load with iSetup Migrator.

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
Accounts Payable: Suppliers	*Accounts Payable*	Suppliers
Accounts Receivable: Customers	*Accounts Receivable*	Customers
Accounts Receivable: Tax Codes and Rates	*Accounts Receivable*	Receivables Tax Codes and Rates
Discrete Manufacturing and Distribution Setups	*Advanced Planning Systems*	Sourcing Rules
		Assignment Sets
		Planning Parameters
		MSD Dimensions
		MSD Hierarchies
		MSD Hierarchy Levels
		MSD Levels
		Application Instances
		ATP Rules
	Bill Of Material	Exception Templates

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Bill Of Material Parameters
		BOM Calendars & Calendar Exception Templates
		Department Classes
		Simulation Sets
		Bill Of Material
		Alternate Designators
		Departments
		Resources
		Routings
		Department Resources
		Items
	Costing	Cost Types
		Cost Groups
		Cost Subelements Defaults
		Cost Sub Elements
		Activities and Activity Costs
		Expenditure Types for Cost Elements
		Cost Group Accounts
		Item Costs
	Engineering	Change Order Types
		Change Order Reasons
		Change Order Priorities
		ECO Autonumbering
		Change Type Processes
	Enterprise Asset Management	EAM Parameters
		Areas

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Attribute Assignments
		Item Activity Association
	Inventory	Item Attribute Controls
		Item Status Codes
		Item Categories
		Item Valid Categories
		Item Templates
		Item Locators
		Item Cross References
		Category Sets
		Default Category Sets
		Unit of Measure, Conversions, and Classes
		ABC Compiles
		ABC Classes
		ABC Assignment Groups And Item Assignments
		Inter-Location Transit Time
		Catalog Groups
		Transaction Reasons
		Physical Inventories
		Cycle Countings
		Cycle Count Items
		Picking Rules
		Planners
		Organization Access
		Subinventories
		Stock Locators

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Shipping Networks
		Shortage Parameters
		Inventory Parameters
		Movement Statistics Parameters
		Movement Statistics Validation Rules
		Cycle Count Classes
		Economic Zones
		Inventory FlexFields
		Inter-Company Relationships
		HR Locations Update
		Inventory Organizations
	Order Management	Order Import Sources
		Order Parameters
		Transaction Types
		Transaction Types Update
		Credit Check Rules
		Credit Usage Rule Set
		Credit Usage Rule Set Assignment
		Holds
		Credit Profiles
	Pricing	Price Lists
		Simple Price Modifiers
		Price Formulas
	Purchasing	Purchasing Options
		Receiving Options

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Approval Groups, Group Assignments and Rules
		Buyers
		Document Types
		Line Types
		Approved Supplier Lists
		Blanket Purchase Orders
		Quality Inspection Codes
		Approval Assignments
	Shipping	Shipping Parameters
		Global Shipping Parameters
		Pick Slip Grouping Rules
		Release Rules
		Release Sequence Rules
		Freight Cost Types
		Carriers,Methods,Carrier-ModeServ,Carrier-Org
		Shipping Document Sets
		Printers
		Shipping Execution Grants
		Shipping Execution Role Definition
	Work in Process	WIP Parameters
		WIP Parameters Update
		WIP Accounting Classes
		Shop Floor Statuses
		Schedule Groups
		Labor Rates

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Production Lines
		Tolerance Fences
	Quality	Collection Elements
		Specifications
		Collection Plans
Financials Common Setups	*Accounts Payable*	Special Calendars
		Payables Payment Terms
		Invoice Approvals
		Aging Periods
		Payment Formats
		Suppliers
		Tax Authority Suppliers
		Payables Tax Codes
		Withholding Tax
	Accounts Receivable	Statement Cycles
		Invoicing Rules
		Line Ordering Rules
		Invoice Grouping Rules
		Auto Cash Rule Sets
		Receivables Payment Terms
		Approval User Limits
		Collectors
		Customer Profile Classes
		Aging Buckets
		Receivables Territories
	Fixed Assets	Asset Keywords
		Asset Categories

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Asset Locations
		Asset System Controls
		Fiscal Years
		Asset Depreciation Calendars
		Asset Prorate Conventions
		Asset Book Controls
		Asset Quick Codes
	General Foundation	Descriptive Flexfields
		Key Flexfields
		Value Set Values
		Menus
		Request Groups
		Responsibilities
		Compile All Flexfields
		Printers
		Users
		Lookups
		Resources
		Sales Representatives
		Document Sequence Categories
		Document Sequences
	General Ledger	Chart Of Accounts
		Code Combination
		Statistical Units of Measure
		Accounting Calendars
		Currencies

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Conversion Rate Types
		Daily Rates
		Set of Books
		Period Rates
		Budgets
		Budget Organizations
		Journal Reversal Criteria
		Encumbrance Types
		Summary Templates
	Human Resources Organization Structure	Business Groups
		Enable Multiple Security Groups
		Locations
		Legal Entities
		Operating Units
		Organizations
		Convert to Multi-Org Concurrent Program
		All Profile Options
	Public Sector Financials	Budgetary Control Groups
		Transaction Codes
Financials Operating Unit Level Setups	*Operating Units*	Invoice Tolerances
		Payables Options
		Financials Options
		Reporting Entities
		Distribution Sets
		Expense Templates

Table C–1 Setup Object List

Selection Set Name	**Folder/Category Name**	**Setup Object Name**
		Receivables System Options
		Receivables Transaction Types
		Receivables Activities
		Receipt Classes and Methods
		Receipt Sources
		Auto Accounting
		Remit To Addresses
		Memo Lines
		Transaction Sources
		Receivables Tax Codes and Rates
		Tax Exemptions
		Cash Management System Parameters
		Banks and Bank Accounts
		Transaction Codes
		Operating Units
		Inventory Organizations
		All Profile Options
Financials Setup	*Accounts Payable*	Invoice Tolerances
		Special Calendars
		Payables Payment Terms
		Payables Options
		Financials Options
		Reporting Entities
		Invoice Approvals
		Aging Periods

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Payment Formats
		Suppliers
		Tax Authority Suppliers
		Payables Tax Codes
		Distribution Sets
		Withholding Tax
		Expense Templates
		Banks and Bank Accounts
	Accounts Receivable	Statement Cycles
		Invoicing Rules
		Line Ordering Rules
		Invoice Grouping Rules
		Auto Cash Rule Sets
		Receivables System Options
		Receivables Payment Terms
		Receivables Transaction Types
		Receivables Activities
		Receipt Classes and Methods
		Receipt Sources
		Auto AccountingApproval User Limits
		Collectors
		Remit To Addresses
		Customer Profile Classes
		Aging Buckets
		Receivables Territories

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Memo Lines
		Transaction Sources
		Receivables Tax Codes and Rates
		Tax Exemptions
		Customers
	Cash Management	Cash Management System Parameters
		Transaction Codes
	Fixed Assets	Asset Keywords
		Asset Categories
		Asset Locations
		Asset System Controls
		Fiscal Years
		Asset Depreciation Calendars
		Asset Prorate Conventions
		Asset Book Controls
		Asset Quick Codes
	General Foundation	Descriptive Flexfields
		Key Flexfields
		Value Set Values
		Menus
		Request Groups
		Responsibilities
		Compile All Flexfields
		All Profile Options
		Printers

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Users
		Lookups
		Resources
		Sales Representatives
		Document Sequence Categories
	General Ledger	Chart Of Accounts
		Code Combination
		Statistical Units of Measure
		Accounting Calendars
		Currencies
		Conversion Rate Types
		Daily Rates
		Set of Books
		Period Rates
		Budgets
		Budget Organizations
		Journal Reversal Criteria
		Encumbrance Types
		Summary Templates
	Human Resources Work Structures	Business Groups
		Enable Multiple Security Groups
		Locations
		Legal Entities
		Operating Units
		Job Groups

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Jobs
		Positions
		Position Structures
		Position Structure Versions
		Position Structure Elements (Hierarchies)
		Organizations
		Organization Structures
		Organization Structure Versions
		Organization Structure Elements (Hierarchies)
		Grades
		Employees
		Element Links
		Convert to Multi-Org Concurrent Program
		Inventory Organizations
	Public Sector Financials	Budgetary Control Groups
		Transaction Codes
General Ledger: Accounting Calendars	*General Ledger*	Accounting Calendars
General Ledger: Chart of Accounts	*General Ledger*	Chart of Accounts
General Ledger: Currencies	*General Ledger*	Currencies
General Ledger: Set of Books	*General Ledger*	Set of Books
Human Resources: Employees	*Human Resources*	Employees
HR Organization Structure Setups	*HR Organization Structure Setups*	Business Groups

Table C–1 Setup Object List

Selection Set Name	Folder/Category Name	Setup Object Name
		Locations
		Legal Entities
		Operating Units
		Job Groups
		Jobs
		Positions
		Position Structures
		Position Structure Versions
		Position Structure Elements (Hierarchies)
		Organizations
		Organization Structures
		Organization Structure Versions
		Organization Structure Elements (Hierarchies)
		Grades
		Employees
		Salary Bases
		Payrolls
		Element Links
Profile Options Setup	*Profile Options Setup*	All Profile Options

Glossary

C D E F I L R S T U

Central Instance

This is the database of the Oracle E-Business Suite instance where iSetup Migrator is running.

Data Source

The source of setup data that you want to load or report on. The Data Source can be a Snapshot or a Snapshot File stored on your desktop.

Data Host Name

Name of the server where the database is running on. This is also known as the Database Server name.

Database ID (SID)

Database ID that is used to connect to the database instance.

Database Mapping

The process of mapping logical database instances for use as source and target instances during Extract and Load. Mapping a database entails defining an Instance Name, a Database Host Name, a Database ID, an Oracle Applications Responsibility, and creating a DBC File.

DBC File

Before creating a database mapping, you must have a DBC (Database Connectivity) File created for the connection between the current database instance and the remote database instance that you want to map to.

Extract

The process of extracting setup data from a source instance, which will generate a Snapshot.

Extract Request

A request to the Concurrent Manager on the source instance to extract your specified setup data.

Filter

Used to restrict or refine the selection of specific data from a given setup object or a collection of setup objects during the extract process

Instance Name

Logical name you can give to the instance you want to create during Database Mapping. This Instance Name is used as the Source or Target Instance in the Migrator user interface.

iSetup Migrator

iSetup Migrator lets you transfer setup parameters between different instances of the Oracle E-Business Suite. The iSetup Migrator provides two main functions, the capability to Extract and the capability to Load setup data.

iSetup Reporter

iSetup Reporter gives you the capability to report on different setup objects.

Load

The process of loading setup data from a Snapshot or a Snapshot File into a target instance.

Load Request

A request to the Concurrent Manager on the target instance to load your specified setup data.

Responsibility

Oracle Applications Responsibility that is used to access the Concurrent Manager in the source or target instances for Extract and Load, respectively.

Restart

The process of restarting a failed Extract or Load request. The Extract or Load request could fail due to invalid objects in your system or an improperly configured environment. When the Extract or Load fails, you can fix the problem and restart the processes from the user interface. Restarting an Extract process will resubmit a new request with the same request parameters. The Load process can restart from where it failed.

Selection Set

A Selection Set is a collection of setup objects for which you want to extract data. You can also set filters on these objects as part of your selection set definition.

Selection Set Template

Pre-defined collections of setup objects. 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

Data that is generated by iSetup Migrator after you complete an extract. Once an extract is complete, the extracted setup data is saved as a Snapshot.

Source Instance

This is the database of the Oracle E-Business Suite instance that is source of setup parameters. You extract setup data from this database.

Target Instance

This is the database of the Oracle E-Business Suite that is the target for the setup parameters. You load extracted setup data into this database.

Target Value

While loading setup data into the target instance, you can specify a new target value (i.e. a new name or a new parent object) for the object you are loading. The changes made on the object will be cascaded down to its referenced objects.

Update Existing (During Load) Flag

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