Oracle Applications Cloud
Using Functional Setup Manager
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons 🎨 to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.

- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

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<th>Convention</th>
<th>Meaning</th>
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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
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Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Overview

Functional Setup Manager: Overview

Oracle Functional Setup Manager provides an integrated, end-to-end process for functional administrators to manage the implementation and maintenance of Oracle Applications Cloud.

Functional Setup Manager offers the following:

- Standardized application configuration and setup experience
- Feature opt-in for a best fit configuration
- Flexible processes for managing setup:
  - Setup by functional areas for an adopt-as-you-go approach
  - Implementation projects to manage setup
  - Upload file to enter setup data in bulk
- Guided task list for end-to-end setup requirements
- Export and import services for setup data migration between environments
- Comprehensive reporting on setup data

Who Uses the Functional Setup Manager: Points to Consider

Business users who are responsible for configuring feature opt-in and managing setup data are the primary users of Functional Setup Manager.

Security Access

The Application Implementation Consultant job role has full access to perform all Functional Setup Manager-related activities. Other users must include the Functional Setups User role in addition to other roles or privileges needed to perform specific setup activities.

For more detailed information about security requirements for Functional Setup Manager, refer to the Oracle Applications Cloud Security Reference for Common Features guide in the All Books for Oracle Cloud page of the Oracle Help Center (docs.oracle.com).

Related Topics

- Oracle Applications Cloud Security Reference for Common Features
Functional Setup Manager Components: How They Work Together

Offerings, functional areas, features, and setup tasks work together in your implementation.

Offerings
An offering represents a collection of business processes that are supported by Oracle Applications Cloud. Each subscription of Oracle Cloud provides license to use one or more offerings and they’re the starting point of all implementations. An offering consists of multiple functional areas and features.

Functional Areas
A functional area represents one or more business sub-processes and activities within its parent offering. It may represent a core operation of the offering or may represent an optional activity which may or may not be applicable to your business. When you start to implement an offering by enabling it, core functional areas are enabled automatically. You have a choice to opt into and enable an optional functional area or to opt out of it. A functional area may be divided into smaller functional areas creating a hierarchy to help you to decide what to opt into one step at a time. Some of the functional areas may be applicable to more than one offering. Once you set up a shared functional area, you do not have to set it up again when implementing another parent offering. However, Oracle recommends that during successive implementation of the other parents you verify if there are any offering-specific tasks that may still require your attention.

Features
Features are optional business practices or methods applicable to the functional areas. Like functional areas, you can decide to opt into or opt out of features depending on the requirements of your business processes. Features can be one of three different types:

- Yes or No: These features allow you either to opt into or to opt out of them and are represented by a single check box. You select them to opt into or deselect them to opt out.
- Single Choice: These features offer multiple choices but allow you to select only one option. Select the option applicable to your business processes.
- Multi-Choice: These features offer multiple choices but allow you to select more than one of the choices. Each choice is presented with a check box. Select all that apply to your business processes by checking the appropriate choices.

Setup Tasks
Setup tasks represent the work necessary to set up an offering and the business processes and activities that the offering represents to make them ready for transaction processing. Perform these tasks to enter setup data when you implement an offering.

Tasks representing setup requirements of the offerings and the functional areas are grouped into task lists and are organized in a hierarchy. For example, all setup tasks of an offering are grouped into a task list which includes subtask lists that represent setup of functional areas within the offering. This helps you gain visibility into setup data that are related to each other, helping you to manage setup.
Functional Setup Manager Work Areas: How They Work Together

Use the My Enterprise and Setup and Maintenance work areas to manage feature opt-in and setup of your subscribed offerings.

My Enterprise Work Area Group

The following work areas are part of the My Enterprise work group:

- Offerings
- New Features
- Enterprise
- Subscriptions

Offerings

This work area shows all available offerings. Review and opt into your subscribed offerings when you are ready to implement. Oracle Applications Cloud are available for use only after the relevant offerings and their related features are opted into by enabling them. This helps you to configure Oracle Applications Cloud according to what your enterprise requires and exclude any irrelevant features. Get started by reviewing the description of the offerings and the related documents, which helps you to determine what features to opt into and how to plan for implementation.

New Features

This work area highlights the new features that were introduced in the latest release version to give more visibility to what is new in Oracle Applications Cloud. After upgrade, review this page to get a quick view of the newly introduced features, and to decide whether to opt into any of them.

Enterprise

This work area lets you enter your enterprise-specific information related to your Oracle Applications Cloud.

Subscriptions

This work area shows your subscriptions for Oracle Applications Cloud.

Implementation Process: Explained

A functional implementation of Oracle Applications Cloud typically includes the following steps.

- Plan
- Configure
• Setup
• Deploy
• Maintain

Plan
Identify the offerings you want to implement. Evaluate what functional areas and features to opt into and prepare accordingly for their setup requirements.

For more detailed information, refer to the Planning an Implementation chapter in the Using Functional Setup Manager guide.

Configure
Opt into the offerings, functional areas, and features that best fit your business requirements by enabling them.

For more detailed information, refer to the Configuring Offerings chapter in the Using Functional Setup Manager guide.

Setup
Use setup tasks to enter setup data necessary for your enabled offerings and functional areas. Typically, you set up and verify your transaction processes in a test environment before starting to transact in a production environment.

For more detailed information, refer to the following chapters in the Using Functional Setup Manager guide:

• Managing Offering Setup
• Managing Setup Using Implementation Projects
• Managing Setup Using Alternative Processes

Deploy
Move your verified setup data from the test environment to a production environment and deploy to all users to start transaction processing.

For more detailed information, refer to the Exporting and Importing Setup Data chapter in the Using Functional Setup Manager guide.

Maintain
Update setup data or opt into configuration of the functional areas and features as necessary when your business requirements change over time.

Related Topics
• Oracle Applications Cloud Using Functional Setup Manager
2 Planning an Implementation

Planning Your Implementation: Explained

To plan for the implementation of your subscribed Oracle Applications Cloud, identify the offerings you need to implement. Functional Setup Manager provides documentation to help you to understand the functionality and the setup requirements of the offerings. Review those documents and then prepare the data you need to implement the relevant offerings.

Reviewing Your Subscription: Procedure

This procedure explains how to review your Oracle Cloud Applications subscription information. You need the Configure Oracle Fusion Applications Offering privilege (ASM_CONFIGURE_OFFERING_PRIV) to perform this procedure.

Review Your Subscription

To review your Oracle Cloud Applications subscription information, follow these steps.

1. Click Navigator > My Enterprise > Subscriptions work area.
2. In the Review Subscriptions page, select Subscribed in the Show menu to view your licensed subscriptions, or All to view all available subscriptions for Oracle cloud applications.

Entering Promotion Codes: Procedure

This procedure explains how to enter a promotion code to activate a functional area or feature of an offering. You need the Configure Oracle Fusion Applications Offering privilege (ASM_CONFIGURE_OFFERING_PRIV) to perform this procedure.

Enter Promotion Codes

If you are given a promotion code to activate a functional area or feature of an offering, then follow these steps to enter the promotion code.

1. Click Navigator > My Enterprise > Subscriptions work area.
2. In the Review Subscriptions page, click Enter Promotion Code.
3. Enter the promotion code you are given in the Enter Promotion Code dialog box and click Save and Close.

The promotion code you entered is now listed in the Review Subscriptions page.
Planning Your Implementation: Procedure

Use the Offerings page to learn about the opt-in configuration and the setup requirements of an offering. You need the Review Applications Offering privilege (ASM_REVIEW_APPLICATIONS_OFFERINGS_PRIV) to access and review setup information.

Review Setup Information

To access and review setup information, follow these steps:

1. Click **Navigator > My Enterprise > Offerings** work area.
2. In the Offerings page, explore the list and select the offering you want to implement. You can read the offering descriptions.
3. Click **Related Documents** to access the following information:
   - Associated Features Report: This report shows the list of functional areas and features associated with the offering.
   - Setup Task Lists and Tasks Report: This report shows the list of task lists and tasks that you should complete to successfully implement the offering.
   - Related Business Objects Report: This report shows all setup data needed to implement the offering. It provides a list of all business objects that are associated with the setup tasks belonging to the offering.
   - Related Enterprise Applications Report: This report shows the list of enterprise applications used by the functional pages and web services for the offering.

Related Topics

- Configuring Offerings
3 Configuring Offerings

Configuring Offerings: Explained

To configure an offering for implementation, you opt into its functional areas and features that are applicable to your business operations. You start your opt-in configuration by enabling the offering. The offering and its functional areas are shown in a hierarchy to help you decide, step-by-step, what to opt into. When an offering is enabled, all functional areas and features representing core functionality of the offering are also automatically enabled. You decide which of the optional functional areas and features to opt into by specifically enabling them.

After the initial implementation of the offering, if you must change the opt-in configuration to enable additional functional areas or features at a later time, use the same procedure to enable them as well.

In some cases, opt-in selection of a functional area or a feature may be locked once enabled due to the business operation it represents and its selection cannot be changed.

Configuring Offerings: Procedure

Video

Watch: This video tutorial shows you how to set up the offerings for initial use. The content of this video is also covered in text topics.

Step-by-Step Process

Enable offerings to modify functionality so that it matches the services you plan to implement. You can review the current functional areas and features within an offering and make changes. To perform these tasks, you need the Configure Oracle Fusion Applications Offering privilege (ASM_CONFIGURE_OFFERING_PRIV).

Enable Offerings

To enable offerings, follow these steps:

1. Click Navigator > My Enterprise > Offerings work area.
2. In the Offerings page, select the offering you want to implement.
3. Click the Opt In Features button.
4. In the Opt In page, review the functional hierarchy. Select the check box in the Enable column to opt into the offerings and functional areas as applicable to your business operation.
5. Click the Features icon in the Features column for the enabled offering or functional area and enable the applicable features.
6. In the Edit Features page,
   - To enable a Yes or No feature, select the check box in the Enable column.
To enable a Single Choice or a Multi-Choice feature, click the Features icon in the Enable column and make the required selection.

To enable a feature using an opt-in task because the Enable check box isn’t available for selection, click the icon in the Opt In Task column.

7. Click Done to return to the Opt In page.
8. Click Done to return to the Offerings page.

Repeat these steps for each offering you want to implement. You can use this procedure to change the opt-in configuration of any functional areas or features of an enabled offering.

Opting into New Features After Upgrade: Explained

New functional areas and features for an offering you implemented are often introduced in the later revisions of Oracle Applications Cloud. You can use the New Features work area to explore and learn about what has been introduced in the last upgrade of your applications and decide whether to opt into them.

You can review the new functional areas and features of all your enabled offerings or focus on only one of them. For each functional area or feature, you can view its opt-in status, check whether it requires setup, and access additional help topics to learn more details.

Opting into New Features After Upgrade: Procedure

Video

Watch: This video tutorial shows how to review and opt into new functional areas and features after Oracle Applications Cloud is upgraded to a newer revision. The content of this video is also covered in text topics.

Step-by-Step Process

Use the New Features page to review and opt into new functional areas and features.

You need the following privileges to opt into new functional areas and features:

- Review Applications Offering (ASM_REVIEW_APPLICATIONS_OFFERINGS_PRIV)
- Configure Oracle Fusion Applications Offering (ASM_CONFIGURE_OFFERING_PRIV)

Opt In

To opt into new functional areas and features, follow these steps.

1. Click Navigator > My Enterprise > New Features.
2. On the New Features page, select your enabled offering from the menu to review the new functional areas and features that became available in the latest revision of the offering.
3. For each new functional area or feature:
   - Use Learn More to find additional help topics.

   **Tip:** If the Learn More column isn't visible, go to the global header, click your user image or name, and select Show Help Icons.

   - Select the Enabled column to view opt-in status. You find a check mark if it is already enabled.
   - Consult the Requires Setup column to learn whether it requires setup and plan accordingly.

4. If you decide to opt into any functional area or feature, click the Go to Opt In icon. For a new functional area, open the Opt In page. For a new feature, open the Edit Features page.

   **Note:** You need the Configure Oracle Fusion Applications Offering privilege (ASM_CONFIGURE_OFFERING_PRIV) to perform this step.

5. Select the Enable check box, or in case of features with multiple choices, select the applicable choices.
   
   If the Enable check box isn’t available for selection, click the icon in the Opt In Task column to enable a feature using an opt-in task.

6. Click Done to return to the New Features page.

### Reviewing Opt In History: Explained

Since opt in configuration directly influences behavior of setup and transactional processes, a history of all such changes is maintained. You can review this information in the Opt In History Page.

If you experience an unexpected change in the behavior of the application, you can review the opt in history to determine:

- Who made the changes
- When the changes were made
- How the opt-in selections changed

### Reviewing Opt In History: Procedure

You can review change history of the opt in configuration using the Opt In History page. You need the Configure Oracle Fusion Applications Offering privilege (ASM_CONFIGURE_OFFERING_PRIV) to perform this procedure.

### Reviewing Opt In Change History

To review change history of the opt in configuration, follow these steps:

1. Click Navigator > My Enterprise > Offerings work area.
2. In the Offerings page, select the offering whose opt in history you want to review.
3. Click the Opt In Features button.
4. In the Opt In page, click the View All History button to open the Opt In History page to view changes made to all functional areas and features of an offering.
Review the change history. Changes made to the opt-in configuration are shown from most recent to least recent. The change history includes the following information:

- Name of the offering, functional area or feature whose opt in selection changed.
- Type, that is, whether it’s an offering, functional area or a feature.
- Old value, that is, what the opt in selection was before the change.
- New value, that is, what the opt in selection changed to.
- User ID of the user who made the change.
- Date and time of the change.

FAQ's for Configuring Offerings

Why can't I enable a feature?

A feature can be enabled only when its parent is also enabled. You must enable the parent before you enable the feature.

Why is the opt-in setting of an enabled functional area or feature read-only?

The opt-in setting of a functional area or feature is shown as read-only due to one of the following two reasons:

- If a functional area or feature represents a core functionality of the offering, it automatically inherits the enabled or disabled status of its parent.
- The opt-in setting of the functional area or feature may be locked once enabled due to the business operation it represents.

Why is a functional area or feature enabled when its parent is not yet enabled?

If a functional area or feature is shared by multiple offerings, and if you have enabled any one of those offerings, then that functional area or feature is shown as enabled for all of those offerings. However, you can manage setup data of the functional area only by using the offerings that are enabled.
Why is the Setup icon not displayed for a functional area or feature?

If the Setup icon is not displayed, then the functional area or feature does not require any setup before you can start to use the related transactions.

Why is the Setup icon disabled for a functional area or feature?

Unless a functional area or feature is enabled, you cannot manage its setup data. Therefore, the Setup icon is enabled only after you enable the functional area or feature.

Why does the icon in the Requires Setup column show read-only?

If you do not have permission to perform a setup task, then the Requires Setup column shows read-only to inform you that a functional area or feature requires setup before the related transactions can be performed. However, you cannot use the icon to go to the Setup page to manage setup data since you do not have permission. Contact the person with permission to set up the functional area or feature before you start processing the related transactions.

Why is the Opt-In button missing for a new feature of an offering I am using?

If a feature represents a core functionality of the offering that you previously enabled, then a new feature is automatically opted into after upgrade. Therefore, the Opt-In button is not displayed.

How can I find online help for the new features of the offerings I am using?

Select the Help icon from the Home page before you go to the New Features page. If any new feature provides online help, the Learn More column displays an icon. You can click the icon to view detailed information.
Managing Setup Using Offering Functional Areas

Managing Setup Using Offering Functional Areas: Explained

After you enable an offering and configure the opt-in selection of its functional areas and features, you can set up the offering by using its functional areas as a guide. This adopt-as-you-go approach to functional setup gives you the flexibility to set up different functional areas of the offering at different times.

For example, you can begin with setup of the functional areas you require immediately to start transactions. You can then set up other functional areas as you adopt additional offering functionality over time. This setup process is ideal for an enterprise looking for a simpler implementation approach that follows setup best practices.

Functional Areas

When using this method, you start by selecting one of the offerings you enabled. Based on your opt-in configuration, all its enabled functional areas, which include core and optional functional areas, are automatically displayed in a list to guide you through the setup tasks. The display order reflects the sequence in which the functional areas should be set up because setup data of the functional areas listed higher up in the list are usually prerequisite for those shown lower in the list. Any functional area for which setup is mandatory is marked with an asterisk.

Functional areas that are applicable to more than one of your enabled offerings are marked as shared to allow you to evaluate whether they were previously set up during the implementation of another offering. Even if a shared functional area was set up previously, you may still need to evaluate if it requires additional setup data for the offering you are presently implementing.

For some functional areas, Quick Setup may be available to implement its basic functionality quickly. A Quick Setup icon next to a functional area indicates if Quick Setup is available. You can use this task instead of the setup task list to set up those functional areas.

Setup Tasks

For each functional area, a sequenced list of tasks representing the setup best practices according to your opt-in configuration of the features is shown to guide you through optimal implementation requirements. Use the tasks to enter the setup data they represent. Like functional areas, the display order of the tasks always reflects the sequence in which they should be performed to address setup data dependencies.

Required Tasks

Only the required setup tasks are shown by default to minimize your setup effort and to make the offering ready for transactions sooner. However, you can also review the rest of the tasks in the list, which are typically optional or have predefined default values based on common use cases, and decide whether your implementation must change their default setup data.

Tasks with Scope

If any setup data is segmented by a specific attribute or scope, you may need to perform the task iteratively. If so, you must select a qualifying scope value prior to performing the task. You can pick a scope value that was previously selected, select a
new scope value, or create a new scope value and then select it. The selected value is a qualifying attribute of the setup data and therefore, different setup data can be entered for the different scope values.

⚠️ Note: You cannot perform a task if you do not have the proper security privileges.

Managing Setup Using Offering Functional Area: Procedure

Setting Up Offerings: Video

 Watches: This video tutorial shows you how to create business data to set up the specific offering components you need for your enterprise. The content of this video is also covered in text topics.

Setting Up Offerings with Scope: Video

 Watches: This video tutorial shows you how to create business data for a specific version of a business object with scope. The content of this video is also covered in text topics.

Step-by-Step Process

Use the Setup and Maintenance work area to directly implement an entire offering or the functional areas within an offering. You need the Functional Setups User role (ORA_ASM_FUNCTIONAL_SETUPS_USER_ABSTRACT) to set up an offering, and a role with task-specific privileges to enter and modify setup data. Refer to the Oracle Applications Cloud Security Reference for Common Features guide for more information about task-specific privileges.

Set Up an Offering

To set up an offering using its functional areas, follow these steps.

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select the offering you want to implement.
3. Review the list of functional areas. If a functional area is not listed, then it is not enabled. To enable the functional area, follow the steps in Configuring Offerings: Procedure.
4. If you are setting up this offering for the first time, select the functional areas one at a time in the order they are listed. If you are making changes to existing setup data, select the applicable functional area.
5. If Quick Setup is available for the functional area, then you can use Quick Setup to enter data instead of using the related setup tasks. Click the icon and proceed.
6. Enter setup data for a functional area by selecting its tasks in the order they are listed. Select a task to open the page where you enter setup data for that task. To modify existing setup data, just select the relevant task directly.
Note: If the functional area requires any mandatory setup, then only the tasks for entering the required setup data are shown by default. If all setup data is optional for the functional area, then all tasks are shown by default. To see the full list of required and optional tasks for the functional area, select All Tasks from the Show list.

7. If the task requires a scope, select a scope value before you proceed. If you previously selected a scope value, then that value is listed in the Scope column. Ensure it’s the correct value and if needed, select a different value. You can create a new value, select and add an existing value, or select one from the list of previously selected values. Click Apply and Go to Task when you finished your selection. Unless you change it, the selected scope value is used for all tasks that use the same scope.

8. Enter setup data. When you finish, close the page, which returns you to the setup task list.

9. Continue to select other tasks from the list as needed and enter setup data for them.

Related Topics
- Reviewing and Opting into New Features after Upgrade: Procedure
- Configuring Offerings: Procedure

Accessing Tasks to Update Existing Setup Data: Procedure

Use the Setup and Maintenance work area to update the existing setup data within an offering.

Updating Setup Data

To update the existing setup data, follow these steps.

1. Click Navigator > Setup and Maintenance.
2. In the Setup and Maintenance work area, select an offering.
3. Select the functional area, and from the list of tasks, select the setup task that you want to update. If you don’t find the task in the default list of required tasks, select All Tasks from the Show list to display all tasks.

Tip: If Quick Setup is available for the functional area, click the icon and proceed to update data instead of using the related setup tasks.

4. Do one of the following:
   - For tasks that require a scope, if you previously selected a scope value, the existing value appears in the Scope column. You may retain the same value or update a new scope value. If no value was set, ensure that you set a correct scope value and click Apply and Go to Task. The selected scope value is used for all tasks that use the same scope.
   - If the task doesn’t require a scope, click the task and proceed.

5. Update the setup data on the corresponding task page.
6. Save the changes and close the page to return to the task list.

Related Topics
- Reviewing and Opting into New Features after Upgrade: Procedure
FAQ's for Managing Setup Using Offering Functional Areas

Why can't I find the offering I want to set up in page header menu?

You cannot set up an offering that you have not enabled yet. First, follow the steps for configuring offerings and enable the offering you want to set up. If you do not have permission to configure offerings, then contact the person in your organization who configures the offerings and ask them to enable it. Once the offering is configured and enabled, return to the Setup page. You can find the offering in the page title menu and start its setup.

Why can't I find a functional area I want to set up for my offering in the list of the functional areas shown on the Setup page?

For a functional area to appear on the list, it must have been enabled as part of the feature opt-in configuration. If you have permission to configure offerings, then you can select Change Feature Opt In to open the offering Opt In page and enable the functional area. If you do not have permission to configure offerings, then contact the person in your organization who configures the offerings and ask them to enable the functional area. Once the functional area is enabled, return to the Setup page. The functional area is now listed in the Setup page.

How can I find a task when I do not know which functional area it is related to?

Enter the full or partial name of the task in the Search Tasks field then click the Search icon. The search results are shown in a window. All tasks that meet the search criteria, along with their related functional areas, are shown. Select the appropriate task name from the search results to go to the task in the Task table.
5 Managing Setup Using Implementation Projects

Managing Setup Using Implementation Projects: Explained

An implementation project is a list of setup tasks you use to implement your Oracle Applications Cloud. Using this method, you create an implementation project to generate a list of setup tasks, assign tasks to various users who are responsible for managing setup data, and monitor progress of the completion of the setup tasks.

This method is best suited to modify the default setup best practices, or manage setup as a project by assigning responsibility of managing setup data to a broad group of users while monitoring their progress.

Generating a Task List

When you create an implementation project, typically you generate its initial list of tasks by selecting one of your enabled offerings. If you plan to use more than one offering, create a separate implementation project for each one of them. In addition to selecting an offering, which automatically selects its core functional areas, you may also select none, some, or all of the optional functional areas of the offering that are also enabled.

Note: If you create an implementation project with more than one offering, you can’t use it to export and import setup data. The export and import process fails.

Using your selection of the offering and the functional areas as a template, a task list hierarchy is generated for the implementation project. The task list hierarchy includes the tasks that are associated at the time with your selected offering and functional areas, and their dependent features that are enabled.

Within the task list hierarchy, the tasks are organized according to prerequisite and dependency requirements of the setup data that they represent. Oracle recommends that you enter setup data in the same sequence as the tasks to avoid errors due to missing prerequisite data.

Modifying a Task List

You can modify the task list hierarchy of an implementation project if needed, by adding, removing, or reordering its tasks. If you modify the task list hierarchy, you must consider and maintain data dependency requirements. Otherwise your users encounter errors when using the implementation project either to enter setup data or to export and import setup data to a different environment.

Note: Once an implementation project is created, it no longer has any relationship with the offering and functional areas you used to create it. Therefore, after you create an implementation project, you can’t modify its task list hierarchy by changing the opt-in configuration of those offering functional areas, or by changing the task list associated with them.

Any modification you make to an implementation project’s task list is strictly applicable to that implementation project only and doesn’t affect any other projects with similar lists of tasks.

Modifications to the task list don’t affect setup data represented by the tasks in the list. Once setup data is entered you cannot identify its source, such as which implementation project or any other method was used to enter or update the data.
Likewise, if you remove a task from an implementation project, any setup data entered using the task continues to exist in the environment unless you explicitly delete the data using an appropriate user interface.

Assigning Setup Tasks
You can assign the tasks of an implementation project to the users who are responsible for managing setup data represented by those tasks. Typically, each setup task is assigned to a single individual. However, you can also assign multiple individuals to the same task if your implementation project requires such assignment. Each of the individuals has the flexibility to perform the task and manage setup data independently of the other users assigned to the same task.

If you specify due dates for completing the assigned tasks, it helps you monitor the progress of the task assignments and monitor the progress of the overall implementation project. If you assign multiple people to a task, you can assign the same due date to each person or you can assign a different due date to each assigned individual.

You can reassign tasks to a different user, or specify a new due date at any time.

Note: If you assign a task list to a user, then all the tasks included in the task list are assigned to that user.

Managing Setup Using Implementation Projects: Procedure

Video

Watch: This video tutorial shows you how to implement offerings and their components. The content of this video is also covered in text topics.

Step-by-Step Process
Before creating an implementation project, ensure that you configured the offerings and opted into their functional areas and features you plan to use. You need the Manage Implementation Project privilege (ASM_MANAGE_IMPLEMENTATION_PROJECT_PRIV) to create and manage implementation projects.

Create an Implementation Project
To create an implementation project, follow these steps:

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Manage Implementation Projects from the Tasks panel tab.
3. In the Manage Implementation Projects page, select Create from the Actions menu, or click the Create icon.
4. In the Create Implementation Project: Basic Information page, enter a meaningful name and a brief description to describe your project.
5. Optionally, assign the project to a user and specify a start date.
6. Click Next. All enabled offerings and functional areas are listed in the Create Implementation Project: Select Offerings to Implement page.
7. Select the offering and its functional areas you want to use to generate the task list for this project.
8. Click Save and Open Project when you complete your selection.
9. A page with the name you specified for your implementation project opens, displaying its task list. The default task list is generated based on your offering and functional area selection in the previous step. You can modify the task list if needed, and begin to assign the tasks to the appropriate users.

Modify an Implementation Project

The default task list generated for an implementation project is always organized in the proper sequence to address data dependency requirements of the setup data they represent. The best practice is to not modify the task list unless it is unavoidable for your business requirements.

You can add, remove or reorder tasks within an implementation project. Before you make any such modifications to your implementation projects, ensure that data dependency requirements aren’t compromised.

Add Tasks

To add setup tasks to an implementation project, follow these steps:

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Manage Implementation Projects from the Tasks panel tab.
3. In the Manage Implementation Projects page, open the implementation project you want to modify to view its task list hierarchy.
4. Select the task or task list you want to add the new task after, and click the Add icon.
5. In the Add Task Lists and Tasks page, search for the task or task list you want to add, select it, and click Apply. Your selection is added after the task or task list you selected in the previous step.
6. Repeat search select and apply to add additional tasks or task lists, as required. Click Done when you finished to return to your implementation project.

Reorder Tasks

To reorder setup tasks of an implementation project, follow these steps.

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Manage Implementation Projects from the Tasks panel tab.
3. In the Manage Implementation Projects page, open the implementation project you want to modify to view its task list hierarchy.
4. Select the task you want to move.
5. Click Actions > Reorder.

Follow the same steps to move a task list.

Remove Tasks

To remove setup tasks from an implementation project, follow these steps.

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Manage Implementation Projects from the Tasks panel tab.
3. In the Manage Implementation Projects page, open the implementation project you want to modify to view its task list hierarchy.
4. Select the task or task list you want to remove.
5. Click the Remove icon.

Note: When you remove a task, any setup data you entered using the task is not removed.

Related Topics
- Opting into New Features After Upgrade: Procedure
• Configuring Offerings: Procedure

Assigning Setup Tasks: Procedure

If users with various functional responsibilities within your organization are entering setup data related to their functional expertise, then assign the appropriate setup tasks to those users. Assign due dates to monitor their progress. If needed, you can also reassign tasks from one user to another.

Initial Assignment

To assign setup tasks to functional users for the first time, follow these steps:

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Manage Implementation Projects from the Tasks panel tab.
3. In the Manage Implementation Projects page, open the implementation projects whose tasks you want to assign to users.
4. Select one or more tasks or task lists from the task list hierarchy.
5. Click Assign Tasks to go to the Assign Tasks window.
6. Search and select one or more users to whom you want to assign your selected tasks or task lists and click Apply. Selected users are added to the Assigned Users table in the Assign Tasks window.
7. Repeat search, select and apply to add additional users if needed. Click Done when you finish adding to return to the Assign Tasks window.
8. To assign the same due date to all the assigned users, select the Assign same date check box.
9. To assign a different due date to each assigned user, click the Due Date column in the Assigned Users table and select a due date for each assigned user.
10. Add notes for your assigned users, if necessary. Click Save and Close to return to the implementation project.

Reassignment

To reassign setup tasks from one user to another, follow these steps:

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Manage Implementation Projects from the Tasks panel tab.
3. Click Overview.
4. In the Implementation Projects: Overview page, from the Assigned Users table, search and select the implementation project whose assignment you want to change.
5. Click the Assignment Details tab in the Implementation Project Details region.
6. Search and select the task whose assignment you want to change and click Reassign Tasks.
7. In the Reassign Tasks window, select the user to whom you want to reassign the task from the New User menu.
8. Select a new due date if necessary.
9. Click Save and Close.
10. Repeat the steps to reassign more tasks if necessary.

Entering Setup Data Using Assigned Tasks: Explained

If you are a user to whom setup tasks from an implementation project have been assigned, then a consolidated list of all of your assigned tasks is presented to you. Use each task from the list to enter setup data that the task represents. If you have a
long list of assigned tasks, you can filter the list by due date, task status, or implementation project name to find a task more easily. In addition, you can search for a specific task in the list by the task name.

Note: You must have the proper security privileges to perform a task.

Tasks with Scope
If any setup data is segmented by a specific attribute or scope, you may need to perform the task iteratively. If so, you must select a qualifying scope value prior to performing the task. You can pick a scope value that was previously selected, select a new scope value, or create a new scope value and then select it. The selected value is a qualifying attribute of the setup data and therefore, different setup data can be entered for the different scope values.

Predecessor Tasks
Some setup tasks may represent setup data that are a prerequisite for other setup data. These setup tasks are known as the predecessor tasks.

Your assigned task list will indicate if any of the tasks has dependency on a predecessor task and will provide the following information:

- Which tasks are the predecessors of a given task.
- What are the present statuses of the predecessor tasks.
- What statuses are recommended for each of the predecessor task before entering setup data.

Setting Task Status
By default the status of all assigned tasks are set to Not Started. When you start to enter data for a task, you can change the task status to In Progress and when you finish entering data you can change it to Completed. Although status of a task does not determine whether or not you can continue to enter setup data for the task or whether you can export and import the data, it helps the implementation manager monitor the progress of the assignments.

Adding Notes
You can add a file, URL, or free-format text as notes to your assigned tasks. These notes are accessible not only to you, but also to the implementation manager and other assignees if multiple users are assigned to the same task. This helps you communicate and collaborate with others assignees.

Entering Setup Data Using Assigned Tasks: Procedure

Video

Watch: This video tutorial shows you how to enter setup data using Assigned Implementation Tasks. The content of this video is also covered in text topics.
Step-by-Step Process

You can enter setup data using assigned tasks from the Assigned Implementation Tasks page.

Enter Setup Data Using Assigned Tasks

To enter setup data using assigned tasks, follow these steps:

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Assigned Implementation Tasks from the Tasks panel tab.
3. In the Assigned Implementation Tasks page, find the task for which you want to enter data. Use filters if necessary to help you find the task.
4. Check if the task has dependencies on predecessor tasks. If so, check the statuses and recommended statuses for the predecessor tasks.
5. Click Go to Task to go to the page for entering setup data for the task. You need task-specific privileges to perform this step. Refer to the Oracle Applications Cloud Security Reference for Common Features guide for more details on task-specific privilege requirements.
6. If the task requires a scope, then select a scope value. If you previously selected a scope value then that value is listed in the Scope column. Verify that the correct scope value is selected and if needed, select a different value by clicking it. You can Create a new value, Select and Add an existing value, or select one from the list of previously selected values. Click Apply and Go to Task when you finish your selection. The selected scope value is used for all tasks that use the same scope unless you change it.
7. Enter the setup data. When you finish, close the page to return to the setup task list.
8. Click the icon in the Status column to change status
9. Click the number in the Notes column to add a note if necessary.
10. Select other tasks from the list and repeat the steps to enter setup data for them.

Monitoring Implementation Progress: Explained

Several graphical reports are available for you to monitor and analyze the progress of the assigned tasks in your implementation project. You can drill down on the graphs on the Overview page to get all of the information you want to track the progress of your project.

Assignment by Status

This pie chart shows the statuses of the assigned tasks as percentages of the total number of tasks in the implementation project. The pie chart also shows the actual number of tasks with the specific status. The task statuses are predefined and used to indicate the progress. The available statuses are as follows:

- Not Started
- In Progress
- Completed
- Execution Frozen
- Submitted
- Completed with Errors
- Completed with Warnings
Assignment by Due Dates
This stacked column graph shows the number of assignments with due dates in various predefined time periods, broken down by different task statuses. Time periods are represented by columns while task statuses are represented by stacks within each column. The report compares due dates of the assigned tasks with the current date to determine which time period a task belongs to. The predefined due date periods are as follows:

- Past Due (one week or more)
- This Week
- Next Week
- In 3 Weeks
- In 4 Weeks
- After 4 Weeks
- None (no due date)

Task Status by Task List
This stacked column graph shows the total number of tasks for each of the task lists in an implementation project as columns. The total number includes tasks from all subsequent levels of the task list. Each column is further broken down by task statuses, which are represented by stacks within a column. Since the task lists are organized in a hierarchy in an implementation project, the graph displays only the top nodes of an implementation project at first. You can drill down on each graph to view the next level of details.

Top 5 Assigned Users with Incomplete Tasks by Due Dates
This stacked column graph shows the top five users who have the most number of incomplete tasks, such as tasks with a status anything other than Completed, as columns. Each column is further broken down by due date periods, which are represented by stacks within a column.

Top 5 Task Allocations
This stacked column graph shows the top five users with the most assignments and is filtered by due date periods. Each user’s allocation is further broken down by task statuses, which are represented by stacks within a column. The default filtering is set to This Week.

Monitoring Implementation Progress: Procedure
Use the Implementation Projects: Overview page to monitor the progress of an implementation project. You need the Review Implementation Project Overview privilege (ASM_REVIEW_IP_OVERVIEW_PAGE_PRIV) to perform this procedure.

Monitor Implementation Progress
To monitor the progress of an implementation project, follow these steps:

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Manage Implementation Projects from the Tasks panel tab.
3. In the Manage Implementation Projects page, click Overview.
4. In the Implementation Projects: Overview page, search and select the implementation project you want to monitor from list of projects.

5. In the Implementation Project Details region,
   - Click the Assignment Status tab to view the Assignment by Status and the Assignment by Due Date reports.
   - Click the Assignment Status by Task Lists tab to view the Assignment Status by Task List report.
   - Click the Resource Status tab to view the Top 5 Assigned Users with Incomplete Tasks by Due Dates and the Top 5 Task Allocations reports.

FAQ's for Managing Setup Using Implementation Projects

Why doesn't my implementation project show the tasks for a functional area or feature I recently enabled?

If you enabled a functional area or feature after creating the implementation project, then the implementation project won’t show the tasks related to the newly enabled functional area or feature. The task list for an implementation project is created based on the enabled status of the functional areas and features at the time you created the implementation project. Once the task list is generated, it does not change if the opt-in configuration changes at a later time.

Why do my implementation projects include some common tasks regardless of which offering I use to create it?

Every offering is self-contained, for example, its default setup task list contains all tasks, including the prerequisites, to complete its end-to-end implementation. If there are setup tasks that are needed by multiple offerings, then each of them include those tasks.

Does a common task duplicate setup data if I use it in multiple implementation projects?

No, a task used in multiple implementation projects doesn't create duplicate data. Setup data is not segmented by an implementation project or any other method you use to enter it. Each task points to the same setup data irrespective of the implementation project from which you perform it. Therefore, when you use a task from a different implementation project, you can also review the existing data and update it if necessary.

How can I see what types of setup data I enter using an implementation project?

An implementation project shows the hierarchy of setup tasks by default. You can toggle to view the business object hierarchy instead. Each business object represents a type of setup data. The sequence of the business objects in the
hierarchy indicates the order in which the setup data is exported and imported when the implementation project is used for export or import processes.

Why didn't the task show as completed when I returned to my assigned task list after entering data?

After entering setup data, when you return to the assigned task list, it does not necessarily mean that you have completed entering data. You may need to return to the task to enter additional information. Therefore, a task is never marked as completed automatically. When you know that you finished entering all data necessary for the task, you can set the task status to completed.

Why did a common task I already performed and set to completed not show as completed in every instance of the task across multiple implementation projects?

You must set the task status individually for each task in each implementation project. The setup data for a task might need a different set of data for a different implementation. The status of a task doesn't update based on its status in a previous implementation. For example, you implement Financial Control and Reporting and complete the currency setup. Later, when you implement Procurement, you want a few additional currencies for paying suppliers but not for financial reporting.

What happens if I change the task list of an implementation project after I start entering data?

You can modify an implementation project's task list at any time. Your changes become effective immediately. If you add a new task, it becomes immediately available for assignment, status reporting, and execution. If you remove any task, it does not remain a part of the task list any longer. However, any data entered using the task is not removed.

How can I view implementation-specific reports?

You can download and print a set of reports at each level of the implementation task list hierarchy. These reports show the relevant information for the task list and all dependent task lists and tasks. The available reports are the Setup Task Lists and Tasks report, the Related Business Objects report, and the Related Enterprise Applications report.
Managing Setup Using CSV File Packages

Exporting and Importing CSV File Packages: Explained

When you enter or update a large volume of setup data, using the setup task UI to manage them individually may not be the most efficient method.

To create or update setup data in bulk, use the export and import of CSV file packages. Use CSV file packages to manage setup data of a specific task or a group of tasks associated with a functional area or offering.

Exporting and Importing CSV File Packages: Procedure

Video

Watch: This video tutorial shows you how to export setup data using CSV. The content of this video is also covered in text topics.

Step-by-Step Process

To export and import CSV file packages, you must have the Application Implementation Consultant role. You also require additional roles as specified in the Additional Access for Exporting and Importing Setup Data: Explained topic, to export setup data related to the specific business objects.

You also need the following privileges:

- Submit Export Setup Data Process (ASM_SUBMIT_EXPORT_SETUP_DATA_PROCESS_PRIV)
- Submit Import Setup Data Process (ASM_SUBMIT_IMPORT_SETUP_DATA_PROCESS_PRIV)
- Task-specific privileges

Refer to the Oracle Applications Cloud Security Reference for Common Features guide for detailed information about task-specific privileges.

Exporting Setup Data to a CSV file

To export setup data to a CSV file, follow these steps:

1. Click Navigator > Setup and Maintenance.
2. On the Setup page, select the offering whose task requires setup data entry using CSV file.
3. Identify the setup data as appropriate:
   - For all tasks associated with the offering, click Actions > Export to CSV File.
   - For all tasks associated with a functional area, select the functional area and click Actions > Export to CSV File.
For specific tasks:

- Select the appropriate functional area and go to the Tasks table.
- Select Columns > View > Actions to make the applicable task actions visible.
- Select the task, and from the corresponding Actions menu, select Export to CSV File.

**Note:** The Export to CSV file option is disabled if the task doesn’t support export.

4. Select Create New. You can export all existing setup data represented by the task.
   - If Scope is supported for any of the selected setup tasks, you can select appropriate scope values to filter the setup data you want to export.
   - You can also download the template for managing setup data without exporting the existing setup data in the environment. To do so, select the Export only template files check box.
5. Click Submit to start the export process.
6. Select Export to CSV file for the offering, functional area, or task to see the latest process. Monitor the process until it completes.
7. Select the process once it completes to review the results. Verify that the process completed without any errors before you download the CSV file package.
8. You may find more than one CSV file if there are more than one business object associated with the task.

Modifying Setup Data in a CSV File

To enter or modify the setup data in the CSV file, follow these steps:

1. Extract files from the downloaded CSV file package to a local folder.
2. Open Microsoft Excel and click the Data tab.
3. In the Get External Data group, click From Text.
4. Navigate to and select the CSV file you downloaded.
5. Select Delimited as Data Type and click Next.
6. Select Comma as delimiter and click Next.
7. Select Text as column data format for all columns and click Finish. You can now edit the file.

**Tip:** If you require further information to understand how to fill up the CSV file, refer to the Help associated with the task.
8. Make the necessary changes and save the CSV into a .zip file. Ensure that the CSV file size doesn’t exceed 10MB. You can now import the file.

Importing Setup Data in a CSV File

To upload the new or modified setup data, follow these steps:

1. Select Import from CSV file from the Actions menu of an offering, a functional area, or a task as appropriate.
2. Select Create New.
3. Select the appropriate .zip file. The application validates that the file corresponds to the selected offering, functional area, or task before you can submit the process.
4. Click Submit.
5. Select Import from CSV file to see the latest processes. Monitor the process until it completes.
6. Select the process once it completes to review the results. If any error occurs, review the details listed in Status Details in the Business Objects section. Fix the issues and import again, if necessary.
7. After you import the setup data successfully, you can verify the loaded data by selecting the task from the Setup page.

## Automate the Export and Import of CSV File Packages

You can use the SOAP web services or the REST APIs if you want to perform the export and import of CSV file packages outside of the Setup and Maintenance work area.

Refer to the following documents for detailed information on working with the web services and the APIs:

- SOAP Web Services for Common Features in Oracle Applications Cloud
- REST API for Common Features in Oracle Applications Cloud

The roles and privileges that you require to export and import CSV file packages using Setup and Maintenance are required to initiate the export and import of CSV file packages using the APIs. Ensure that you have the following:

- Application Implementation Consultant role
- Submit Export Setup Data Process privilege
- Submit Import Setup Data Process privilege
- Task-specific privileges

Also refer to the topic Additional Access for Exporting and Importing Setup Data: Explained to determine if you need access to a few additional roles. For detailed information about task-specific privileges, refer to the guide Oracle Applications Cloud Security Reference for Common Features.

## Finding the Code of an Offering, Functional Area, or Task

To initiate the export or import process using an API, you must provide the code of the offering, functional area, or task. To find the relevant code, follow these steps:

1. Click Navigator > Setup and Maintenance.
2. In the Setup and Maintenance work area, click Manage Setup Content from the Tasks panel tab.
3. Follow these instructions to obtain the required code:

<table>
<thead>
<tr>
<th>To search for the code of an offering or a functional area</th>
<th>To search for the code of a task</th>
</tr>
</thead>
<tbody>
<tr>
<td>b. In the Search field, select Offerings or Functional Area depending upon the code you are searching for, and click Search.</td>
<td>b. In the Search field, select Tasks and click Search.</td>
</tr>
<tr>
<td>c. In the search results, click the name of the offering or the functional area.</td>
<td>c. In the search results, click the name of the task.</td>
</tr>
<tr>
<td>d. On the Enter Basic Information page, look for value that appears against <strong>Code</strong>.</td>
<td>d. On the Task page, look for value that appears against <strong>Code</strong>.</td>
</tr>
<tr>
<td>e. Copy the code and use it where necessary.</td>
<td>e. Copy the code and use it where necessary.</td>
</tr>
</tbody>
</table>
Modifying Setup Data in a CSV File

To enter or modify the setup data in the CSV file, follow these steps:

1. Extract files from the downloaded CSV file package to a local folder.
2. Open Microsoft Excel and click the Data tab.
3. In the Get External Data group, click From Text.
4. Navigate to and select the CSV file you downloaded.
5. Select Delimited as Data Type and click Next.
6. Select Comma as delimiter and click Next.
7. Select Text as column data format for all columns and click Finish. You can now edit the file.

💡 **Tip:** If you require further information to understand how to fill up the CSV file, refer to the Help associated with the task.

8. Make the necessary changes and save the CSV into a .zip file. Ensure that the CSV file size doesn’t exceed 10MB. You can now import the file.
## Exporting and Importing Setup Data

### Exporting and Importing Setup Data: Overview

Any implementation of Oracle Applications Cloud usually requires migrating setup data from one environment to another at various points in the subscription lifecycle. For example, a subscribed offering is typically set up in the test environment first, and is moved to the production environment only after proper testing and verification. Setup export and import processes help you migrate setup data from test to production.

Two distinct methods are available for migrating setup data:

- Export and import an entire offering or any of its functional areas. In this method, setup data of the business objects associated with the offering or the selected functional area is migrated.
- Export and import an implementation project. In this method, setup data of the business objects associated with the implementation project is migrated.

**Note:** You cannot combine the export and import processes of these different methods. When an offering or functional area is exported, that setup data can only be imported using the same offering or functional area. Similarly, when an implementation project is exported, that setup data can only be imported using implementation project-based import.

### Exporting and Importing Setup Data: Explained

This topic explains the following areas in brief to help you export and import setup data.

- Setup Business Objects
- Configuration Packages
- Scope to Filter Exported Setup Data
- Importing Feature Opt-In
- Setup Data Update Rules During Import
- Import Sequence of Setup Data
- Export and Import Process Results

### Setup Business Objects

Setup business objects are the logical representations of setup data. The export and import processes use these business objects and their associated web services to read and write the appropriate set of setup data from source to the target environments respectively.
Configuration Packages

A configuration package is the medium used to move setup data from one environment to another. When you export setup, a configuration package is created which includes the following:

- A list of setup tasks based on the offering, functional area or implementation project you used for the export process.
- The business objects associated with those tasks.
- Exported setup data of those business objects

After an export process runs successfully, you can download the configuration package as a .zip file. You can then move this configuration package to the environment where you plan to import the same setup, upload the file, and run the import.

Source

Export and Download

Configuration Package

Upload and Import

Target

Scope to Filter Exported Setup Data

When a business object is exported, all its setup data is exported by default. You may optionally select one or more Scope values to filter setup data of the business objects and limit the exported data. The resulting configuration package from that export process contains only the setup data that matches the Scope criteria you specified.

Importing Feature Opt-In

When you export an offering or a functional area, the configuration package includes the opt-in configuration of all their dependent functional areas and features as they were set in the source environment at the time of export. However, the import of the same configuration package does not automatically import the opt-in configurations to the target environment.

You may choose to import the opt-in configuration from the source to the target when you import the configuration package. The import process enables the dependent functional areas and features that were enabled in the source but are not enabled in the target. The opt-in configuration of any other dependents in the target remains unchanged.

\[\text{Note:}\] This option is not available when you use an implementation project to export and import setup data.
Setup Data Update Rules During Import

When you import a configuration package to the target environment, setup data in the target is modified as follows:

- If a record exists in the configuration package but doesn’t exist in the target, then import creates the record.
- If a record does not exist in the configuration package but exists in the target, then import does not modify the record in the target.

**Note:** Import does not delete the records in the target that do not exist in the configuration package. You must delete these records or make them obsolete manually, if necessary.

- If a record exists both in the configuration package and in the target, then:
  - If all attribute values are the same, import does not modify the record in the target.
  - If values of any attributes of the record are different, then import updates the record in the target with the values in the configuration package.

Import Sequence of Setup Data

Some setups are prerequisites for other setups and thus, have data dependencies. Therefore, the sequence in which setup data is imported from a configuration package is important to prevent any failure due to data dependency.

The sequence of the tasks within the offering, functional area or implementation project, which you used during export to create the configuration package, determines the sequence in which their related business objects, and consequently, the setup data are imported. The following business objects, on the other hand, are exceptions to the default task-based sequence rule. They are always exported and imported before any other business objects in the sequence specified in this table:

<table>
<thead>
<tr>
<th>Business Object Name</th>
<th>Business Object ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Taxonomy</td>
<td>FND_APP_TAXONOMY</td>
</tr>
<tr>
<td>Application Reference Data Set</td>
<td>FND_APP_REFERENCE_DATA_SET</td>
</tr>
<tr>
<td>Application Reference Data Set Assignment</td>
<td>FND_APP_REFERENCE_DATA_SET_ASSIGNMENT</td>
</tr>
<tr>
<td>Application Lookup</td>
<td>FND_APP_SET_ENABLED_LOOKUP</td>
</tr>
<tr>
<td>Data Security Policy</td>
<td>FND_APP_DATA_SECURITY_POLICY</td>
</tr>
<tr>
<td>Application Tree Structure</td>
<td>FND_APP_TREE_STRUCTURE</td>
</tr>
<tr>
<td>Application Tree Label</td>
<td>FND_APP_TREE_LABEL</td>
</tr>
<tr>
<td>Application Tree</td>
<td>FND_APP_TREE</td>
</tr>
<tr>
<td>Application Flex Value Set</td>
<td>FND_APP_FLEX_VALUE_SET</td>
</tr>
</tbody>
</table>
Export and Import Process Results

You can review and analyze results of setup export and import processes. The results show what setup data was exported or imported, and are listed in the order in which the business objects were processed. The results also include information about any errors encountered during the export or import process to help you analyze and resolve those errors. You can download the information about the process results in a file to review them offline.

Reviewing Setup Data: Explained

You can review setup data prior to or after the export or import process using the Setup Data Reports and Comparison Reports.

Setup Data Report

After an export process completes successfully, you can download the setup data reports to review and analyze the data that was exported. You can also save the reports for future reference.

A separate report is generated for each business object processed during export, which shows the data that was exported from that business object. If you specified Scope values to filter exported data, the report shows only the data that matches those Scope values.

Comparison Report

You can use the comparison report to review the differences between setup data in two different environments, such as test and production. For example, before running an import process on your production environment, you may want to compare the setup data in your exported configuration package with that in your production environment to avoid any unwanted override.

The comparison report shows you the following:

- Which data exists in the source only.
- Which data exists in the target only.
- Which data exists in both but is identical.
- Which data exists in both but has differences, and what the differences are.

You can then determine how the production data changes after the import by applying the rules as stated in the section Setup Data Update Rules during Import in Exporting and Importing Setup Data: Explained.
Migrating Setup Data From Test to Production: Best Practices

The following best practices help you optimize setup data migration between your test and production environments.

Prepare Environments for Migration

When exporting and importing, the Oracle Cloud Applications revision of both source and target environments must be the same. Ensure that your test and production environments are at the same revision level before your export and import.

Some setup data may not be supported for automatic migration through export and import. Review the Setup Task Lists and Tasks report from the Offerings page to identify the setup tasks that do not have associated setup services. Setup data of these tasks require you to migrate them manually to production using an alternative method.

Manage Setup Data in Gold Environment

If you use a Gold environment to manage your setup data, follow these steps.

1. Enter setup data in the Gold environment.
2. When ready to verify, export the setup data from the Gold environment and import into test.
3. Verify setup data in the test environment.
4. If the setup data requires update, repeat the previous steps with the updates.

Note: Always maintain setup data in the Gold environment, because this environment is used to record and manage your setup data. Never update data directly in the test environment. Otherwise, the Gold environment no longer remains the source of truth for your setup data.

5. After setup data passes verification, export from the Gold and import into the production environment.
6. In the next testing cycle, if the test environment requires refresh from the production environment, use P2T, that is, production to test refresh cloud service.
7. If the Gold environment requires refreshing setup data from the production environment, follow one of these steps as appropriate.
   - If you require that the Gold environment cannot have any transactional data due to security or regulation, then first rebuild it. Next, export Offerings from production and import into the Gold environment. This process brings setup data from production into the Gold environment without bringing any transactional data.
   - On the other hand, if you do not have any restriction on having transactional data existing in the Gold environment, you can use P2T, that is, production to test refresh and synchronize your Gold environment with your production environment.

Note: If you follow the best practices, you may never require to refresh the Gold environment with the setup data in the production environment.
Manage Setup Data in Test Environment

If you do not use a Gold environment, but use the test environment for both maintaining and verifying setup data, follow these steps.

1. Enter and verify setup data in the test environment.
2. After setup data passes verification, export from the test and import into the production environment.
3. If the test environment requires refreshing with setup data from the production environment, use P2T, that is, production to test refresh cloud service.
Additional Points to Consider

Here are some additional points to consider while exporting and importing setup data.

1. Ensure that all setup data is thoroughly tested and verified before you import into the production environment. Similarly, if export and import processes are not available for any setup data and you enter it manually into the production environment, ensure that you created and verified the same data in your gold and test environments first before entering it into the production environment.

2. Do not enter setup data manually into the production environment unless it does not support export and import processes. If you enter any setup data manually in your source environment, Gold or test as applicable, as well as in the production environment, and later use export and import processes to migrate the same data from your source environment to your production environment, the import process might fail.

3. When exporting setup data using an implementation project, export only one offering at a time. Refer to Setup Data Export and Import by Implementation Project: Explained for more details.

4. Use the scope value to limit the volume of exported setup data. Scope is particularly useful when you are migrating only the incremental changes to setup data after you completed the initial deployment of an offering to the production environment.

5. Source control the exported configuration package files to keep a history of setup changes that were applied to the production environment.

6. Consider running comparison of the setup data in the configuration package file with that in the production environment before starting the import process. This lets you review how import changes the production data and help you to avoid making unwanted changes in production. Refer to Setup Data Comparison Results: Explained for more details.

7. Do not ignore the tasks you must perform before and after import. You must migrate their data manually. Otherwise, setup data in production remains incomplete, causing errors during transaction processing.

8. If you are implementing multiple offerings at the same time and importing their setup data into production concurrently, then you must import those offerings in the same sequence as specified in the following section to avoid errors related to data dependencies.

Offering Import Sequence When Migrated Concurrently

This table lists the sequence in which you must import offerings when you implement multiple offerings at the same time and import their setup data into production concurrently:

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Family</th>
<th>Offering</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HCM</td>
<td>Workforce Deployment</td>
</tr>
<tr>
<td>2</td>
<td>HCM</td>
<td>Compensation Management</td>
</tr>
<tr>
<td>3</td>
<td>HCM</td>
<td>Workforce Development</td>
</tr>
<tr>
<td>4</td>
<td>Financials</td>
<td>Financials</td>
</tr>
<tr>
<td>5</td>
<td>Financials</td>
<td>Oracle Fusion Accounting Hub</td>
</tr>
<tr>
<td>6</td>
<td>HCM</td>
<td>Incentive Compensation</td>
</tr>
<tr>
<td>7</td>
<td>CRM</td>
<td>Customer Data Management</td>
</tr>
</tbody>
</table>
### Exporting and Importing Setup Data by Offering or Functional Area: Explained

In this method, you may choose to export and import setup data of an entire offering, or limit the processes to one of its functional areas. This method is a simplified export and import process, which does not require understanding complexities of data dependencies and setup tasks.
By Offering
You typically export and import an entire offering when you migrate setup data of the offering to the target environment for the first time. Setup data related to all enabled functional areas and features of the offering is exported and imported.

By Functional Area
When setup data specific to a functional area changes over time, you might decide to export and import only the affected functional area. This helps to limit export and import of setup data to a smaller range and therefore, migration processes take less time to complete than that of the entire offering.

If you select a specific functional area to export, only the setup data related to that functional area and its enabled features is exported and imported.

Note: You must ensure that all prerequisite setup data needed by the setup data of the exported functional area is available in the target environment before you start import. Otherwise, the import process might fail.

Same Levels of Export and Import
You must start the import process from the same offering or the functional area that was used to create the configuration package file you want to import. Otherwise, you receive an error message until you upload the correct configuration package file. All setup data in the configuration package file is imported irrespective of whether or not the corresponding functional areas or features are enabled in the target environment.

Setup Data Comparison
You can compare setup data of an offering or functional area in an exported configuration package file with that of the same offering or functional area in an environment. Setup data comparison is integrated with the import process as an option to compare and analyze which setup data is imported. Alternatively, you can also use setup data comparison independent of an import process. For example, to compare how the setup data of an environment has changed over a certain period, you can start the comparison outside of an import process.

Exporting Setup Data Using Offering or Functional Area:
Procedure

Video
Watch: This video tutorial shows you how to export offering setup data from your application instance for future importing into another environment. The content of this video is also covered in text topics.
Step-by-Step Process

This procedure shows you how to export setup data using offering or functional area. You need the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) to export setup data. You also need access to additional roles if you are exporting certain business objects. For more information about these additional roles, refer to Additional Access for Exporting and Importing Setup Data: Explained.

Export Setup Data Using Offering or Functional Area

To export setup data using offering or functional area, follow these steps.

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select the offering you want to export from the Offering menu.
3. To export setup data:
   a. For an entire offering, select and open the Actions menu in the page header, and then select Export.
   b. For a specific functional area, select and open the Actions menu corresponding to the functional area, and then select Export.
4. Select Create New to create a new export process.
5. Optionally, specify appropriate scope values to filter exported setup data. By default, all existing setup data is exported for each business object processed during export. However, if scope is supported by any of those business objects, you can select scope values to filter the exported setup data. To specify scope values for one or more of the business objects:
   a. Select the applicable business object from the Business Objects table and then click Add. If no related business object supports scope, then the table remains empty.
   b. Search and select the value you want to use as scope for the business object and click Apply.
   c. Repeat the previous step to add more scope values if needed. Click Done when finished.
6. Click Submit to start the export process.
7. Monitor the status of the export process until it completes by selecting Export from the Actions menu. Up to three most recent processes are listed, and are ordered from newest to oldest. Each process indicates its status at the time, and if it was completed already, then the time stamp when it was processed.
8. While the process is still in progress, you may select the status to view how much progress the process has made at the time. A message shows you how many business objects were already processed out of the total number of objects to be processed. Click View Progress to review the details on the business objects that were already processed. Click the Refresh button to get the most recent information. Refer to Export and Import Process Results: Explained for detailed description of the process results.
9. When the export process completes, select the status link to go to the Export Offering Data Results page.
   a. If the process completes successfully, the status is set to Ready to download.
      i. Click Download File to download the configuration package .zip file and save it at an appropriate location. Use this file to import setup data in the target environment.
      ii. In addition, review the list of post export tasks. If any tasks are listed, then those tasks are not migrated by export and import process. You must migrate that data manually in the target environment.
   b. On the other hand, if the process completes with errors, the status displays Ready for error review.
      i. The Business Objects table shows all business objects that had errors during processing. Refer to Export and Import Process Results: Explained for detailed description of the process results.


ii. Click Download Log File from the page header, which includes the error log of all business objects that experienced error. Alternatively, you can also click Actions > Download Log File corresponding to a specific business object to download error log specific to that business object.

iii. After correcting the cause of the errors, create a new export process.

Importing Setup Data Using Offering or Functional Area: Procedure

Importing Offering Setup: Video

Watch: This video tutorial shows you how to import offering setup data into your application instance. The content of this video is also covered in text topics.

Comparing Offering Setup Data During Import: Video

Watch: This video tutorial shows you how to compare offering setup data during import. The content of this video is also covered in text topics.

Step-by-Step Process

This procedure explains how to import setup data for an offering or functional area. You need the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) to import setup data. You also need access to additional roles if you are importing certain business objects. For more information about additional roles to import these business objects, refer to Additional Access for Exporting and Importing Setup Data: Explained.

Import Offering or Functional Area Setup

To import setup data for an offering or functional area, follow these steps.

1. Click Navigator > Setup and Maintenance work area to open the Setup page.
2. Select the offering you want to import from the Offering menu.
3. If the configuration package you want to import was created by exporting:
   - An offering, select Import from the Actions menu in the page header.
   - A functional area, select Import from the Actions menu corresponding to that functional area.
4. Select Create New to create a new import process.
5. Browse and select the configuration package file that contains the setup data you want to import. View the Configuration Package Details to verify that you selected the correct file.
   - If the offering or functional area selected during export does not match the offering or functional area you chose for the import process, an error message appears. Click the Update button to browse and select the correct file.
6. Expand the **Import** option.
   - Best Practice is to select the **Compare setup data prior to import** option. If you select this option, the import process automatically runs a comparison of the setup data in the configuration package file with that in the target environment before importing the setup data.

   **Note:** Comparing setup data prior to import requires additional time. You may skip this step by not selecting the **Compare setup data prior to import** option. However, if you skip this step, you cannot review how the setup data is similar or different in the source and target, and how the import process changes setup data in the target environment.

   - Optionally, select the **Import feature selection** option to import the opt-in configuration of the offering or functional area you are importing. This imports the enabled dependent functional areas and features of the offering or functional area.

7. Click **Submit** to start the import process.

8. If any setup data requires manual entry before the import can start, a warning message appears. This message shows you the tasks you must perform before submitting the process.
   - If you verified that the setup data for those tasks are already entered in the target environment, click **Submit**.
   - Otherwise, click **Cancel**. Create a new import process after you ensure that the setup data is entered in the target environment.

9. Monitor the import process by clicking **Actions > Import**. Up to three most recent processes are listed and ordered from newest to oldest. Each process indicates its status at the time and, if the process is completed, the time stamp when it was processed.

10. While the process is in progress, you can select the status to view how much progress the process made at the time. A message shows you how many business objects were already processed out of the total number of the objects to be processed. Click **View Progress** to review the details of the business objects that finished processing. Click the **Refresh** button to view the most recent information. Refer to Export and Import Process Results: Explained for detailed information about the process results.

11. If you selected the **Compare setup data prior to import** option, once the comparison completes, the status reads **Waiting for comparison review**. Select the status to go to the Import Offering Data Results page to review the comparison results. Refer to Comparing Setup Data Using Offering or Functional Area: Procedure for a detailed description of the comparison results.

12. Click **Continue to Import** from the Import Offering Data Results page to start the import process if you are satisfied with the comparison results.

13. Alternatively, if you did not select the **Compare setup data prior to import** option, the import process starts automatically.

14. Monitor the process as before, until it completes.

15. If any setup data requires manual data entry during import, the process pauses, and the status reads **Waiting for manual import**.
   - Select the status to go to the Import Offering Data Results page and review the details.
   - A list displays the business objects that require manual data entry before import.
   - For each of the listed business objects, click **Go to task**. This displays a list of related tasks. Select each task to enter the required data.
   - After you enter the setup data for all the listed business objects, click **Resume** from the Import Offering Data Results page to restart the import process.
   - Click **Confirm** in the confirmation message that appears to resume the import process.

16. Continue to monitor the process until it completes.
17. If the import process completes successfully:
   a. Review the results to verify successful completion.
   b. If any post import tasks are listed, ensure that their setup data is entered. Otherwise, the setup data remains incomplete, and you experience errors when processing transactions.

18. If the import process completes with errors:
   a. The Business Objects table displays all business objects which encountered errors while processing. Refer to Export and Import Process Results: Explained for a detailed description of the process results.
   b. Click the Download Log File from the page header level. This includes the error log of all business objects that encountered errors. Alternatively, click Actions > Download Log File corresponding to a specific business object to download the error log specific to that business object.
   c. Create a new import process after correcting the errors.

Comparing Setup Data Using Offering or Functional Area: Procedure

This topic explains how to compare setup data outside of the import process. To compare setup data during import, refer to Setup Data Import by Offering or Functional Area: Procedure.

You need the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) to compare setup data. You also need access to additional roles to compare certain business objects. For more information about access to additional roles, refer to Additional Access for Exporting and Importing Setup Data: Explained.

Compare Setup Data Using Offering or Functional Area

To compare setup data using offering or functional area, follow these steps.

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select the offering whose setup data you want to compare.
3. If the configuration package you intend to compare was created by exporting:
   o An offering, then select and open the Actions menu in the page header, and then select Compare Setup Data > Create New.
   o A functional area, then select and open the Actions menu corresponding to the functional area, and then select Compare Setup Data > Create New.
4. Upload the configuration package file whose data you want to compare with that in the environment. To upload the configuration package file, follow these steps.
   a. From the Configuration Package menu, select Upload new.
   b. Browse to find the configuration package file and open it.
   c. Optionally, expand Configuration Package Details to verify that you have selected the correct file. If it is not the correct file, then click Update to browse and select the correct file.
   d. Click Submit to upload the configuration package.
5. Once the configuration package is uploaded, the process for setup data comparison is ready to be submitted. Optionally, you can change the default name that the process assigns.
6. Click Submit to start the comparison process.
7. Monitor the status of the process by selecting **Action > Compare Setup Data**. Up to three most recent processes are listed and are ordered from the newest to oldest. Each process indicates its status at the time and, if the process has completed, then the time stamp when it was processed.

8. When the process completes, the status shows **Ready for comparison review**. Select the status to go to **Comparison Process Results** to review the details of the results. Refer to **Setup Data Comparison Results: Explained** for detailed descriptions of the comparison results.

### Exporting and Importing Setup Data Using Implementation Project: Explained

If you used an implementation project to enter setup data, then you can use your implementation project to export and import setup data. In this alternative method, the tasks in your implementation project and their sequence determine the list of setup business objects whose data is exported and imported, and in which order.

> **Note:** Even if you used an implementation project to enter setup data, you can still use an offering or a functional area to export and import the same setup data, to ensure that all data dependencies are migrated properly.

Select your implementation project, and create a configuration package to generate the ordered list of business objects for export and import.

### Exporting One Offering at a Time

The implementation project you use to create a configuration package must contain only one offering. The import process fails otherwise.

If you included multiple offerings in an implementation project to enter setup data, do not use it to create a configuration package for setup data export and import. Instead, create new implementation projects with only one offering in each, and use these to create separate configuration packages.

### Partial Data Migration

Although best practice is to select an offering and its functional areas to create an implementation project, you may have created an implementation project by selecting specific tasks and task lists instead. Such implementation projects are often created to update and maintain a small set of setup data after the initial migration of an offering to a target environment has completed.

When using such implementation projects to create configuration packages for setup data export and import, consider the following requirements carefully to ensure the success of the process:

- If any setup data in the configuration package has a dependency on any other setup data, then that prerequisite data must be available in your target environment before you start the import process using the configuration package. Otherwise, consider including the prerequisite task in the implementation project before you create the configuration package.
- The sequence of the task list and tasks, and therefore the business objects, in your implementation project must align with the setup data dependency requirements. The import process may fail if you do not ensure the correct order of the task lists and tasks in the implementation project.
Comparing Setup Data Before Import

When using an implementation project to migrate setup data, the comparison report is not integrated with the import process. However, best practice is still to compare the setup data in the exported configuration page with the data existing in the target environment before starting the import process.

Exporting Setup Data Using Implementation Project: Procedure

Video

Watch: This video tutorial shows you how to export setup data to configuration packages. The content of this video is also covered in text topics.

Step-by-Step Process

This procedure explains how to export setup data for an implementation project that you already completed setting up. You need the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) to export setup data. You also need access to additional roles if you are exporting certain business objects. For more information about access to the additional roles, refer to Additional Access for Exporting and Importing Setup Data: Explained.

Export Setup Data Using Implementation Project

To export setup data using an implementation project, follow these steps.

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Manage Configuration Packages from the Tasks panel tab.
3. In the Manage Configuration Packages page, select Create from the Actions menu, or click the Create icon from the Search Results table in the Manage Configuration Packages page to go to the Create Configuration Package: Enter Basic Information page.
4. In the Source Implementation Project,
   a. Select the implementation project you want to use for the setup data export from the Name menu.
   b. Leave the default selection for Export, Setup task list and setup data, unchanged.
5. In Configuration Package Details, you can use the default field values for Name, Code and Description, or assign unique values.
6. Click Next to go to the Create Configuration Packages: Select Objects for Export page.
7. The first table displays the list of business objects whose setup data is exported. The implementation project you selected as the source of this configuration package in the previous step determines the business object list.
   a. The Type column indicates the export and import behavior of the business object as follows:
      i. If export and import services are available for a business object then the type is business object service.
ii. If the type is specified as **Scope**, then the business object can be used to select a scope value to filter the exported data. However, the setup data of the business object itself is not exported.

iii. If the setup data of any business object must be migrated manually using alternative methods that are external to setup export and import processes, the type is **Manual data loading**.

   o All business objects whose type is **Business object service** have their **Export** column checked by default. You typically keep this selection unchanged.

   ![Note](image)

   *If a business object has identical setup data in both source and target environments, then you can optionally exclude it from export, and consequently, from import, to reduce processing time. However, if any excluded setup data is prerequisite to import any other setup data in this configuration package, then your import process fails. Therefore, you should use this option cautiously and only when you are certain that the target environment contains the prerequisite data before you start your import process.*

8. When you select a business object in the first table, if it supports scope to filter exported setup data, you can select appropriate scope values in the second table.

   o If the business object you selected has predefined scope values, then scope table lists all of them by default. You could decide to remove one or more of the listed scope values but you cannot add other values.

   o If the business object you selected supports scope but does not have predefined value, then you can add one or more scope values.

   i. Click the **Create** icon in the scope table.

   ii. Search and select each of the values you want to use as scope to export data for and click **Apply**.

   iii. Click **Done** when you finish selecting all desired scope values.

9. Click **Submit** to submit the setup data export process and confirm when the confirmation message appears.

10. Monitor the process from **Manage Configuration Package** until it completes.

   o

11. While the process is in progress, you may select the status to go to the Export and Import Process Results page to view how much progress the process has made at the time. Click the **Refresh** button to get the most recent information. Refer to Export and Import Process Results: Explained for detailed descriptions of the process results.

12. Once the export process completes successfully, click **Download** to download the configuration package. Use this .zip file to import setup data in the target environment. Optionally, select the status to go to the Export and Import Process Results page to view the result details.

13. If the export process completes with errors, then fix the errors according to the following instructions.

   a. Select the status to go to the Export and Import Process Result page to view the error details.

   b. Download the log file for the setup business objects with errors by clicking **Actions > Download > Log file**.

   c. Fix the errors as needed. To modify or enter any data to fix the error, click **Go to Task** to open the corresponding setup page.

14. Create a new export process after the errors are corrected.

**Importing Setup Data Using Implementation Project: Procedure**
Video

Watch: This video tutorial shows you how to import setup data from configuration packages. The content of this video is also covered in text topics.

Step-by-Step Process

This procedure explains how to import setup data for an implementation project. You need the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) to import setup data. You also need access to additional roles if you are importing certain business objects. For more information about additional role to import those business objects, refer to Additional Access for Exporting and Importing Setup Data: Explained.

Import Setup Data Using Implementation Project

To import setup data from a configuration package, follow these steps.

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, select Manage Configuration Packages from the Tasks panel tab.
3. In the Manage Configuration Packages page, click the Upload button from the Search Results table to go to the Upload Configuration Package page.
4. Click the Browse button to browse and select the configuration package you want to import.
5. Click the Get Details button and review the information in Configuration Package Details and Implementation Project Details to verify that you uploaded the correct configuration package for import. If you didn’t upload the correct configuration package file, click the Update button to upload the correct file and verify again.
6. Click Submit to start the upload process.
7. Your configuration package is listed in the Search Results table in the Manage Configuration Package page.
8. Select the configuration package from the Search Results table to view its process details in the Export and Import Processes table.
9. Monitor the upload process until it completes. Once the upload process completes successfully, your configuration package is ready for import.
10. Select the upload process from the Export and Import Processes table and click Import Setup Data.
11. In the Import Setup Data: Enter Basic Information page, click Submit to start the import process with the default settings.
12. You can also make the following modifications before submitting the import process:
   o On the Import Setup Data: Basic Information page, you can change the default process name and description, to help you identify the process later.
   o On the Import Setup Data: Basic Information page, the Pause process each time an error occurs option is selected by default, to indicate that the import process pauses each time it encounters an error. This gives you an opportunity to take corrective action. You can deselect this option so that the import process continues despite the errors. A summary of all the errors is displayed after the process finishes.

Note: If the import process doesn’t pause for each error, it doesn’t require your attention throughout the process. However, this also increases the possibility of additional business objects failing import due to dependencies.
The import process also pauses by default for each task that requires manual data loading. To override this pausing, follow these steps:

- Click **Next** to go to the Import Setup Data: Select Pause for External Import page.
- Select **Manual data loading** from the **Type** menu.
- The **Pause** column displays a check mark for the tasks that require manual data loading before the import can resume. If manual data loading can be performed before or after the import process, this column doesn’t display a check mark.
- Review the list of tasks and deselect the **Pause** column corresponding to the tasks for which you don’t want the import process to pause.

**Note:** Use this option only when you are certain that the setup data for these tasks already exists in the target environment. Import of setup data whose prerequisite is the data that requires manual data loading may fail if this prerequisite data doesn’t exist when the dependent data is imported.

The import process runs immediately when submitted. However, you can also schedule the import process to start at a certain time. To schedule a time, click **Next** to go to the Import Setup Data: Schedule and Notifications page. Select **Use a schedule** and specify a start time.

13. Monitor the import process until it completes. The process status changes according to the state of the process. Select the status to go to the Export and Import Process Results page, and take the appropriate action as follows.

- **In Progress:** While the process is still in progress, you may review how much progress the process made at the time. Click the **Refresh** button to get the most recent information.
- **Completed Successfully:** Review the process results to determine if any setup tasks must be performed manually after the import to properly complete migration of the setup data. If yes, perform those tasks.
- **Waiting for Manual Import:** If a setup task requires manual data entry before the import process can continue, the status reads **Waiting for Manual Import**. Click **Go to Task** for the corresponding business object to open the setup user interface. Alternatively, you can enter the setup data manually. After you enter the required setup data, click **Resume** from the Export and Import Process Results page, or from the Manage Configuration Packages page to restart the import process.
- **Waiting to review errors:** If you selected the **Pause process each time an error occurs** option when you created the import process, this status displays when the import process encounters an error while running. Click **Actions > Download log file** corresponding to the specific business object to review the error details. Take appropriate corrective action and click **Resume** from the Export and Import Process Results page, or from the Manage Configuration Package page.

Optional, you may skip the business object that generated the error, and continue from the next object. However, skip these business objects only if you are certain that the error was fixed in the environment, and that the import process doesn’t require reprocessing the business object.

- **Completed with errors:** When the process completes with errors, click **Actions > Download log file** corresponding to the business objects with errors, to review the error details.

14. Create a new import process after you correct the errors.
Video

Watch: This video tutorial shows you how to compare setup data using configuration packets. The content of this video is also covered in text topics.

Step-by-Step Process

This topic explains how to compare setup data using an implementation project. You need the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) to compare setup data. You also need access to additional roles if you are comparing certain business objects. For more information about additional roles for these business objects, refer to Additional Access for Exporting and Importing Setup Data: Explained.

Compare Setup Data Using Implementation Project

To compare setup data using an implementation project, follow these steps:

1. Click Navigator > Setup and Maintenance work area.
2. In the Setup page, run an export process at the target environment to prepare for setup data comparison. Create an implementation project in the target environment that matches exactly the same task lists and tasks as the implementation project you used at your source environment to create the configuration package file you want to import. Use this implementation project to run the export process at the target environment.
3. Once the export process completes, upload the configuration package file from your source environment into the target environment. Follow the same process as needed, to upload a configuration package for import. However, do not run the import process.
4. Once the upload process completes successfully, select Manage Export and Import Processes from the Tasks panel tab.
5. In the Manage Export and Import Processes page, click Compare.
6. In the Comparison Processes page, select the Create new icon to create a new comparison process.
   a. Select the configuration package you uploaded from your source environment as Source 1. If you have multiple versions of the same configuration package available, then select the correct process date to identify the correct version of the file.
   b. Select the configuration package you created by running the export process at the target environment to prepare for comparison, as Source 2. Like Source 1, if the configuration package you selected for Source 2 has multiple versions available in the target environment, select the correct process date to identify the correct version.
   c. Change the default process name, if required and click Submit.
7. Once the comparison process is submitted, the new process is listed in the Comparison Processes page.
8. The Status column displays the status of the process. Monitor the status until the process completes.
9. When the Status column reads Completed successfully, select the process name to go to the Configuration Package Comparison page to review the details of the results.
10. If the comparison process does not complete successfully, select the status to go to the Comparison Process Results page and review the error details.
Setup Data Comparison Results: Explained

Setup data comparison results are listed in three sections:

- Comparison Summary
- Comparison Details
- Failed Objects

Comparison Summary

This section provides an overview of the results from comparing the setup data, which includes:

- Total number of business objects compared.
- How many of them processed successfully.
- How many of them failed, if any.
- How many of them have records that exist only in the configuration package, that is, the source.
- How many of them have records that exist only in the target environment.
- How many of them have records that exist in both the configuration package and the target environment, but have some data mismatch.

Comparison Details

This section lists each of the business objects that were compared successfully between the source and target environments. For each business object, details of the records that have data mismatch between the source and target environments are displayed. By default, the list includes only the business objects that have data discrepancies. However, you can select **All** from the **Show** filter to also include the business objects that have identical setup data in both the source and target environments.

For each business object, a summary table displays the number of records it has in the following categories. The numbers which are not zero are displayed as links. Select the numbers to open a detailed report.

- **Only in Configuration 1** displays the records that exist only in the exported configuration package file, but not in the target environment. Therefore, when you import this configuration package, these records are created in the target environment.

- **In Both with Mismatch** displays the records that exist in both the source and target environments, but have different values in one or more of the attributes. Consequently, these records are updated in the target environment with their values in the configuration package when you import. The detailed report displays two rows for each record, with one row each representing the source and target environments.

- **Only in Configuration 2** displays the records that exist only in the target environment and not in the configuration package file. These records therefore, remain unchanged when the configuration package is imported in the target environment. You must use the manual process to remove these records from the target.

- **Identical in Both** displays the records that exist in both the source and target environments, and have identical values in all of their attributes. This column is displayed only when the **Show** filter is set to **All**. In addition, this category doesn’t provide any detailed reports on the records and therefore, the number in the summary table is always read-only.
Failed Objects
In case the comparison report failed to process any business objects due to errors, this section displays a list of those objects. For each object, you can use the Feature Details icon to view or save its error log file.

Downloading Reports
Optionally, click the Download button from the Comparison Details section to download and save the reports.

- The Comparison Report provides .zip files that contain comparison reports for each of the business objects that were processed. For each business object, a report each for Only in Configuration 1, In Both With Mismatch, and Only In Configuration 2, as applicable is provided.
- The Comparison Results report provides a summary of the comparison process and represents the table shown in the Comparison Details section of the user interface.
- The Comparison Process Results Summary provides a summary of the process results, which displays a list of all the processed business objects, and whether their processing completed successfully, or with errors.
- The Comparison Log File provides a detailed log of the entire comparison process.

Setup Data Reports: Explained
Setup data reports are generated automatically every time you run an export process by using an offering, functional area or implementation project.

You can also generate setup data reports for an offering or functional area without running an export process. However, this option is not available for implementation projects.

You can download and use these reports to verify the setup data as it exists in the environment. You can also save the reports as documents of the state of your setup data at the time of export, for future reference.

Generating Setup Data Reports: Procedure

Video

Watch: This video tutorial shows you how to generate setup data reports. The content of this video is also covered in text topics.

Step-by-Step Process
This procedure explains how to generate setup data reports. You can download and review a consolidated report of setup data for all exported business objects, or for a specific business object.
Generate Setup Data Reports

To download and review setup data reports, follow these steps.

1. If you ran an export process already and want to use the setup data reports that were generated as a result, then select the export process status to go to process results page once the process completes successfully.

2. To generate setup data reports for an offering or a functional area without running an export process, follow these steps.
   a. Click Actions > Setup Data Reports > Create New for an offering or a functional area as applicable.
   b. Accept the confirmation message.
   c. Continue to monitor the process until it completes successfully.
   d. Select the status to go to the Export and Import Process Results page.

3. Use Download Setup Data Reports:
   o At the page level to download a consolidated report of setup data from all exported business objects.
   o Or, at the individual business object level to download the report for that specific business object.

4. Save and open the .zip file to review the details. If you download the consolidated report, then the .zip file contains one .zip file for each of the exported business object.

Export and Import Process Results: Explained

Export and import process results help you monitor the progress of setup data export or import processes while they are running, and to review their results after the processes complete.

The results are shown in three sections:

- **Summary**
  - Business Objects
  - Post-Export or Post-Import Tasks.

**Summary**

This section shows a summary of the export or import process, which includes:

- The date and time of the export or import process, and its completion status.
- Total number of business objects processed.
- How many business objects were processed successfully.
- How many business objects completed processing with errors.
- How many business objects completed processing with warnings.
- How many setup objects require manual export or import.

**Business Objects**

This section lists the business objects whose setup data was exported and imported. The sequence of the results is the same sequence in which the business objects were processed.
If the process completes successfully, all business objects are listed. If the process completes with errors or warnings, the list includes only those business objects that encountered errors or warnings.

Review the status details for each business object, which shows you how many records were processed. If the status details of a business object indicate that the object was already processed and references another object in the message, then locate the referenced object to review its status details.

If the business object encountered errors, the status details also include detailed information about the errors, and refer to the product which supports the business object. When you log bugs on this business object, use the referenced product and attach the corresponding log file with the bug.

### Post-Export or Post-Import Tasks

Some of the setup data for a configuration cannot be automatically exported and imported since export or import services may not be available for them. You must manually export or import this setup data to ensure that all the relevant setup data is migrated. This section shows you which setup data you must manually export or import after the export or import process completes. Oracle recommends that you follow the same method you used to enter the setup data for each of these tasks.

> **Note:** When reviewing the results of export and import processes based on implementation projects, the Post-Export or Post-Import Tasks are available from the Export and Import Process Results page. Click the **Review Tasks for External Import** button from the Object Details table to access the Post-Export and Post-Import Tasks.

### Export and Import Process Reports

Each time you run an export or import setup data process, a **Process Results Summary**, a **Process Results** report, and a **Log File** generate automatically.

- **Process Results Summary** report is a text file that displays summary information and the status details of each setup business object processed by the export or import process.
- **Process Results** report is a text file that displays the status of an export or import process, and detailed information about encountered during the process. These reports show the same information as the export and import results seen directly in the application.
- **Log File** is a text file that displays detailed information for about each setup object processed by the export or import process.

You can download the export and import process results report from the **Actions** menu. Alternatively, you click the **Download** button from the Export and Import Process Results page, and select the report you want to download.

### Additional Access for Exporting and Importing Setup Data: Explained

You must have the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATIONCONSULTANT_JOB) to export or import setup data. However, you require additional roles to export and import certain business objects.

This table lists the business objects for which additional roles are required, and the role required for each business object.
<table>
<thead>
<tr>
<th>Business Object Name</th>
<th>Required Role Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Card Expense Type Mapping Rule</td>
<td>Corporate Card Administrator</td>
</tr>
<tr>
<td>Corporate Card Company Account</td>
<td>Corporate Card Administrator</td>
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<tr>
<td>Corporate Card Program</td>
<td>Corporate Card Administrator</td>
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<td>Corporate Card Transaction Download Parameter</td>
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<td>Corporate Card Usage Limit Rule</td>
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<td>Bank Statement Automatic Reconciliation Matching Rule Set</td>
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<tr>
<td>Bank Statement Automatic Reconciliation Matching Rule</td>
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<td>Bank Statement Transaction Creation Rule</td>
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<td>Bank Statement Parsing Rule</td>
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<td>Collections Dunning Configuration</td>
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<td>Collections Preference</td>
<td>Collections Manager</td>
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<tr>
<td>Collector</td>
<td>Collections Manager</td>
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<td>Required Role Name</td>
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<td>Expense Audit List Rule</td>
<td>Expense Manager</td>
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<tr>
<td>Expense Receipt Management Rule</td>
<td>Expense Manager</td>
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<td>Incentive Compensation Application Administrator</td>
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<td>Business Object Name</td>
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<td>Position Security Profile Area of Responsibility Scope</td>
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<tr>
<td>China Financial Information Option</td>
<td>Enterprise Financial Data Export Options Management for China</td>
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</tbody>
</table>
FAQs for Exporting and Importing Setup Data

How can I view and print any errors generated while importing or exporting offering setup data?

Follow the steps to open export or import process results as specified in the procedure topics for exporting and importing setup data. Download the log file for either the entire process, or for a specific business object.

Why is an import process stuck with User Action Required status?

An import process is set to User Action Required when the process paused because certain data must be imported. This occurs when the standard service to automate the setup data export and import for a business object which is marked as required for other data is not available. You must migrate or enter the data manually using another application or process external to the Setup and Maintenance work area. Review the process results to identify the business object and resume the process after you take appropriate action to externally import the required setup data.
How can I exclude a business object from exporting?

You can exclude a business object from exporting by deselecting the Export column while creating the configuration package. However, business objects that are exported might have data dependencies on the excluded business objects, which may cause the setup data import of those business objects to fail. Therefore, be cautious when deciding to exclude business objects from the export process.

Why does the configuration package show preselected scope values for some business objects?

For a business object, scope values are selected by default if you selected any scope value when you performed a task to enter setup data, or if it is one of the application core tasks, such as task for defining profile options, which have predefined parameters to filter setup data. You can remove any of these preselected values from the configuration package, if appropriate, for export purposes. Similarly, you can also add more scope values to the configuration package if applicable for your export process.

How can I cancel an export or import process that I submitted?

You can cancel an export or import process from the Manage Export and Import Processes page. Select Cancel Process from the Actions menu on the Manage Export and Import Processes page. Once you confirm to cancel the process, it completes processing the business object that already started, doesn’t process the remaining business objects. The process status is changed to Canceled, and you can’t resume the process.

Why can’t I modify a configuration package I recently created?

You can modify a configuration package only if its status displays Definition in progress. Once you submit the configuration package for export, or upload it for import, its status displays Locked. You can’t modify a configuration package whose status displays Locked.
8 Additional Functionality

Copying Setup Configuration: Explained

You can copy an interdependent setup data configuration to create a new set of interdependent setup data that is similar to the original with only a few differences. This process helps to create data faster, especially for setup requirements that are complex but similar.

For example, create a business unit structure and then copy its setup to create a new business unit structure whose setup data requirements are similar to the original business unit with only a few exceptions.

How Copy Configuration Works

Start the copy process by selecting an existing setup configuration, whose setup data is then copied to a staging area. Next, modify the setup data in the staging area according to the requirements of the new setup configuration you want to create. Since the purpose of copying setup is to create a new set of setup data quickly and easily, only those attributes that are minimally required to be set up are available for edit.

After you complete making modification to the staged setup data, submit an import process which creates the new setup configuration by copying setup data from the original and changing the data where applicable based on the modifications you made.

Once the import process completes, Oracle recommends that you review your new setup configuration to ensure it meets your requirements. You can also make additional changes to the data of the new setup if needed.

The following figure illustrates the steps in the copy configuration process.

Copying Setup Configuration: Procedure

This procedure explains how to copy an existing setup configuration and use it for other setup requirements that are similar.
You need the following privileges to copy a setup configuration:

- Submit Export Setup Data Process (ASM_SUBMIT_EXPORT_SETUP_DATA_PROCESS_PRIV)
- Submit Import Setup Data Process (ASM_SUBMIT_IMPORT_SETUP_DATA_PROCESS_PRIV)
- Task-specific privileges

Refer to the Oracle Applications Cloud Security Reference for Common Features guide for detailed information about task-specific privileges.

Copy Setup Configuration

To copy a setup configuration, follow these steps:

1. Click **Navigator > Setup and Maintenance** work area.
2. In the Setup page, select **Copy Configuration** from the Tasks panel tab.
3. To create Copy Configuration Request,
   a. In the Copy Configuration Requests region, select **Create** from the **Actions** menu. Alternatively, you can also click the **Create** icon.
   b. In the Create Configuration Request page, select the setup configuration you want to copy from **Copy Configuration** menu.
   c. Select the scope of your copy. For example, if you copy setup configuration of business units, then you must select one of the existing business units to copy its setup.
   d. You can change the default request name if necessary.
   e. Click **Submit**.
4. To edit the staged configuration,
   a. Monitor the **Status** column of the request in the **Copy Configuration Requests** table. Click **Ready to Edit** when the status updates.
   b. Enter or update the values for the displayed attributes, which represent the minimum set of setup data required for the new setup configuration to function.
   c. Click **Save and Close** when you complete making changes.
5. To import the staged configuration,
   a. Click **Ready to import** in the **Status** column in the **Copy Configuration Requests** table when the status updates.
   b. The same set of attributes shown in the previous step is displayed for your final review. You can compare the values of the source setup with the values of the new setup. Select **Edit** to make modifications if necessary.
6. To fix copy setup configuration errors,
   a. Click **Ready to fix errors** in the **Status** column in the **Copy Configuration Requests** table.

>Note: You cannot edit the values after the new setup is created.

- Click **Import**.
- The **Status** column of **Copy Configuration Requests** table now shows **Import in progress**. Click the link to monitor the import process. To get updated information click the **Refresh** icon.
b. Review the report and identify where the error occurred. The report lists all business objects in the order they were processed.

- If the error is due to data conflicts such as attempting to create an object that already exists, use **Edit Staged Configuration** to fix the error and resubmit the import process.
- Otherwise, report the issue to your help desk indicating the owning product as indicated in the error. Download and attach the process status details report when reporting the issue.

7. To review the copied setup configuration, click **Ready to review** in the Status column of the Copy Configuration Requests column. You can select the **Go to Task** icon for each setup task displayed to verify accuracy of the setup data.

**Searching For A Task: Points To Consider**

When you make small changes to existing setup data that typically affects one or two tasks, you may search for the task and enter or update the data it represents on a one-off basis.

Use this method of managing setup data cautiously, as it does not give you visibility to the setup data dependencies and recommended sequence of performing tasks. This may cause you to experience errors.

**Searching for a Task: Procedure**

This procedure explains how to search for a specific task to manage the data it represents. You cannot perform this procedure unless you have task-specific privileges. Refer to the Oracle Applications Cloud Security Reference for Common Features guide for detailed information about task-specific privileges.

**Search for a Task**

To search for a specific task, follow these steps:

1. Click **Navigator > Setup and Maintenance** work area.
2. In the Setup page, select **Search** from the Tasks panel tab.
3. In the Search page, enter a string that matches the complete or partial name of the task and click **Search**.

   The string is matched with the names of tasks, lists and business objects by default.
4. Click the **Tasks, Task Lists, Business Objects** link to change the matching criteria. Select the criteria from the available options and click **Done**.
5. From the search results,
   - If you matched with task, click the link in the **Name** column to go to the page for entering the setup data it represents.
   - If you matched with task list or business object name, click the link in the **Name** column to go to a list of tasks that are associated with the task list or business object. Follow the previous step to manage the setup data of each task in the list.
   - If you matched with functional area, click the link in the **Name** column to go to a list of the parent offerings of the functional area. Select the applicable offering to find the list of tasks in the task region. Follow the previous step to manage the setup data of each task in the list.
If you matched with offering name, click the link in the **Name** column to go to the offering. Follow the steps in Managing Offering Setup: Procedure to manage the setup data of the offering.

**Related Topics**

- Accessing Tasks to Update Existing Setup Data: Procedure

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### Registering a Third-Party Application: Procedure

In your application, if you want to reference and use data that’s available on a third-party website or application, you must first register that application. Once registered, you can configure how to dynamically link to it and keep the reference up-to-date so that you always have access to the latest content.

**Procedure**

To register an application:

1. Click **Navigator > Setup and Maintenance**.
2. In the Setup and Maintenance work area, click **Manage Setup Content** from the Tasks panel tab.
3. On the Manage Setup Content page, click **Manage Third-Party Applications**.
4. On the Manage Third-Party Applications page, click **Actions > Create**.
5. Enter the application details in the relevant fields. Ensure that the information you provide is complete and accurate. For example,
   - Begin the URL with `http://` or `https://`.
   - Provide correct access credentials for the selected security policy.

   *Note:* You can’t edit the **Application Name** and **Partner Name** once you save the details.

6. Click **Save and Close**.
feature

Business practices or methods applicable to the functional areas that enable the fine-tuning of business functionality.