

# Oracle® Banking Retail Lending Servicing Cloud Services Data Migration User Guide



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# Contents

1	Overview of Data Migration Utility	
2	Data Migration Process	
3	File Upload	
3.1	View File	4
4	Initiate Migration	
5	Migration Dashboard	
6	Monitor Migration	
7	Migration Maintenance	
8	Sample Entity File formats	
	Index	

# Preface

- [Purpose](#)
- [Before You Begin](#)
- [Module Pre-requisite](#)
- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Conventions](#)
- [Screenshot Disclaimer](#)
- [Acronyms and Abbreviations](#)
- [Basic Actions](#)
- [Symbols and Icons](#)
- [Prerequisite](#)
- [Module Post-requisite](#)

## Purpose

This guide is designed to help user to get acquainted with the product configurations and account operations of Global Retail Lending application. This guide provides answers to specific features and procedures that the user needs to be aware to perform the tasks successfully

## Before You Begin

Kindly refer to the **Getting Started User Guide** for information on common functionalities like login, navigation, and general settings before proceeding with this guide.

## Module Pre-requisite

Specify **User Id** and **Password**, and login to the **Home** screen.

## Audience

This guide is intended for the following User/User Roles:

**Table Audience**

Role	Function
Back Office Data Entry Clerk	Input functions for maintenance related to the interface
Back Office Managers/Officers	Authorization functions

## Documentation Accessibility

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## Related Resources

This is the start of your topic.

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

## Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes

## Acronyms and Abbreviations

The list of the acronyms and abbreviations that are used in this guide are as follows:

**Table Acronyms and Abbreviations**

Abbreviation	Description
OBRH	Oracle Banking Routing Hub
OBRLS	Oracle Banking Retail Loans Servicing
BRD	Business Requirement Document
TDD	Technical design document
PII	Personal Identification Information
MIS Details	Management Information System Details
KYC	Know Your Customer
ISD Code	International Subscriber Dialing code
Email Id	Electronic mail address
TIN	Tax Identification Number
SSN	Social Security Number
CIF	Customer Information File
FCUBS	FLEXCUBE Universal Banking
E-Sign	Electronic Signature
PEP	Politically Exposed Person
FIDM	Financial Institution Data Match
AML	Anti-Money Laundering
FATCH	Foreign Account Tax Compliance Act
SDN	Specially Designated Nationals
CIBIL Score	Credit Information Bureau (India) Limited score
TIN	Tax Identification Number
FATCA	Foreign Account Tax Compliance Act
DOB	Date of Birth
OFAC	Office of Foreign Assets Control

## Basic Actions

The basic actions performed in the screens are as follows:

**Table Basic Actions**

Actions	Description
<b>New</b>	Click <b>New</b> to add a new record. The system initiates a new record and enables the user to specify the required data. The fields marked with required are mandatory.
<b>Save</b>	Click <b>Save</b> to save the details entered or selected in the screen.
<b>Unlock</b>	Click <b>Unlock</b> to update the details of an existing record. The system displays an existing record in editable mode. <ul style="list-style-type: none"> <li>This button is displayed only for the records that are already created.</li> </ul>
<b>Authorize</b>	Click <b>Authorize</b> to authorize the record created. A maker of the screen is not allowed to authorize the same. Only a checker can authorize a record. <ul style="list-style-type: none"> <li>This button is displayed only for the already created records. For more information on the process, refer Authorization Process.</li> </ul>

Table (Cont.) Basic Actions

Actions	Description
<b>Approve</b>	Click <b>Approve</b> to approve the action on selected record. <ul style="list-style-type: none"> <li>This button is displayed once you click <b>Authorize</b>.</li> </ul>
<b>Reject</b>	Click <b>Reject</b> to reject the action on the selected record. <ul style="list-style-type: none"> <li>This button is displayed once you click <b>Authorize</b>.</li> </ul>
<b>Audit</b>	Click <b>Audit</b> to view the maker details, checker details of the record. <ul style="list-style-type: none"> <li>This button is displayed only for the records that are already created.</li> </ul>
<b>Close</b>	Click <b>Close</b> to close a record. This action is available only when a record is created.
<b>Confirm</b>	Click <b>Confirm</b> to confirm the action performed.
<b>Cancel</b>	Click <b>Cancel</b> to cancel the action performed.
<b>Compare</b>	Click <b>Compare</b> to view the comparison of the field values of previous record and the current record. <ul style="list-style-type: none"> <li>This button is displayed in the widget once you click <b>Authorize</b>.</li> </ul>
<b>View</b>	Click <b>View</b> to view the details in a particular modification stage. <ul style="list-style-type: none"> <li>This button is displayed in the widget once you click <b>Authorize</b>.</li> </ul>
<b>View Difference only</b>	Click <b>View Difference only</b> to view a comparison through the field element values of old record and the current record, which has undergone changes. <ul style="list-style-type: none"> <li>This button is displayed once you click <b>Compare</b>.</li> </ul>
<b>Expand All</b>	Click <b>Expand All</b> to expand and view all the details in the sections. <ul style="list-style-type: none"> <li>This button is displayed once you click <b>Compare</b>.</li> </ul>
<b>Collapse All</b>	Click <b>Collapse All</b> to hide the details in the sections. <ul style="list-style-type: none"> <li>This button is displayed once you click <b>Compare</b>.</li> </ul>
<b>OK</b>	Click <b>OK</b> to confirm the details in the screen.

Table (Cont.) Basic Actions

Actions	Description
<b>Auto Authorization</b>	<p>The auto authorization can be configured for the branch servicing screens by creating a Rule based on life cycle code. The steps to create the Auto authorization as follows:</p> <ol style="list-style-type: none"> <li>1. Create the fact value as <b>LIFECYCLECODE</b>.</li> <li>2. Create Rule to enable Auto authorization for any servicing screen and add the expression in Rule for that screen's lifecycle code.</li> <li>3. While creating a Rule the product processor should be given as LOAN and fact should be selected as <b>LIFECYCLECODE</b>.</li> </ol> <p>For example:</p> <ol style="list-style-type: none"> <li>1. IF ( LIFECYCLECODE == LNRDCH ) output Section1 LEVEL:0 Create or modify a Rule Group with Name ApprovalRuleGroup and map the Rule(s) created in the step (2).</li> </ol> <div data-bbox="768 779 1464 1354" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Note</b></p> <ul style="list-style-type: none"> <li>• You can define one single Rule for all the screens and add the expression for the life cycle code or you can define individual Rule for each screen and map to the Rule group.</li> <li>• For more information, refer to the Oracle Banking Common Core User Guide to create Fact, Rule and Rule Group. Multi-Level Authorization Initiation Multi-level authorization can be configured for the branch servicing screens by creating a Rule based on life cycle code.</li> <li>• You can define one single Rule for all the screens and add the expression for the life cycle code or you can define individual Rule for each screen and map to the Rule group. Note: For more information, refer to the Oracle Banking Common Core User Guide to create Fact, Rule and Rule Group</li> </ul> </div>

**Table (Cont.) Basic Actions**

Actions	Description
<p><b>Multi-Level Authorization</b></p>	<p>The multi-level authorization can be configured for the branch servicing screens by creating a Rule based on life cycle code. The steps to create the Multi-level authorization as follows:</p> <ol style="list-style-type: none"> <li>1. Create the fact value as <b>LIFECYCLECODE</b>.</li> <li>2. Create Rule to enable Multi-level authorization for any servicing screen and add the expression in the Rule for that screen's lifecycle code.</li> <li>3. While creating a Rule the product processor should be given as <b>LOAN</b> and fact should be selected as <b>LIFECYCLECODE</b>.</li> </ol> <p>For Example: IF ( LIFECYCLECODE == LNRDCH ) output Section1 LEVEL:1~LSR_FA_LNRDCH_AUTH, LEVEL:2~LSR_FA_LNRDCH_AUTH</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Note</b></p> <ul style="list-style-type: none"> <li>If customer wants to use separate Functional Activity Code for each Level then Rule output need to be define like LVELE:1~&lt;FUNCTIONAL_ACTIVITY_CODE1&gt;, LVELE:2~&lt;FUNCTIONAL_ACTIVITY_CODE2&gt; . Create or modify a Rule Group with name ApprovalRuleGroup and map the rule(s) created in the step (2).</li> <li>You can define one single rule for all the screens and add the expression for the life cycle code or you can define individual rule for each screen and map to the rule group.</li> <li>The maker checker validation will be provided if the same maker tries to authorize the single or multi-level approval transaction.</li> </ul> </div>

## Symbols and Icons

The list of symbols and icons available on the screens are as follows:

**Table Symbols and Icons - Common**

Symbol/Icon	Function
 	<p>Minimize</p>

Table (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	Maximize
	Close
	Perform Search
	Open a list
	Date Range
	Add a new record
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view
	Refresh
	Click this icon to add a new row.
	Click this icon to delete a row, which is already added.
	Calendar
	Alerts
	Unlock Option

Table (Cont.) Symbols and Icons - Common

Symbol/Icon	Function
	View Option
	Reopen Option

Table Symbols and Icons - Widget

Symbol/Icon	Function
	Open status
	Unauthorized status
	Rejected status
	Closed status
	Authorized status
	Modification Number

## Prerequisite

Specify **User ID** and **Password**, and login to **Home** screen.

## Module Post-requisite

After finishing all the requirements, log out from the **Home** screen.

# 1

## Overview of Data Migration Utility

Oracle Banking Data Migration Utility is a software tool or set of tools designed to facilitate the transfer of data from one system or storage format to another. This process is often necessary when organizations upgrade their software, adopt new technologies, or consolidate data from multiple sources.

The purpose of the data migration utility is described as below:

**Table 1-1 Purpose of Data Migration Utility**

Purpose	Description
System Upgrades	When transitioning to a new software system or upgrading an existing one, data migration utilities help transfer data seamlessly, ensuring that valuable information is not lost or corrupted in the process.
Platform Changes	Moving data between different platforms, such as from on-premises servers to cloud-based solutions, requires a data migration utility to handle the transfer efficiently.
Database Changes	Organizations may switch databases for various reasons. A data migration utility can aid in moving data between different database management systems.
Data Consolidation	In cases where data is scattered across multiple sources, a migration utility can be used to consolidate information into a centralized location.

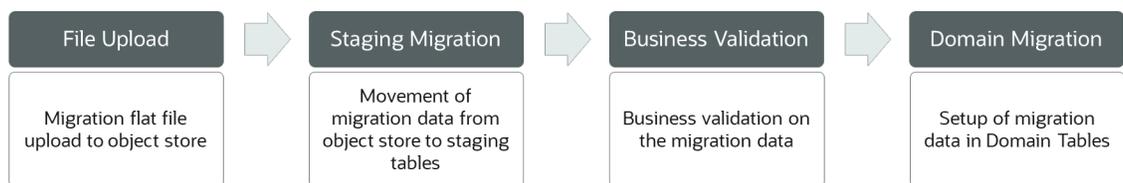
# 2

## Data Migration Process

Data Migration is the process of migrating account information from external systems to the Oracle Banking Retail Lending Cloud Service. The migration process is broken down into sub-processes as detailed below:

Data Migration → Process

**Figure 2-1 Data Migration - Process**



The sub-processes can be further classified into stages wherein each stage completes the migration process in a structured manner

Stage 1:

The service will refer to spring batch tables present in *PLATO\_BATCH* schema and domain migration schema. This stage is about the basic data upload into the staging area

Stage 2:

The next stage is about validating the uploaded data and performing certain validations in terms of data content before the said data can be deemed fit to be considered for insertion in the retail lending *CORE SCHEMA*

Stage 3:

The last and final stage is about data updates in the retail lending *DOMAIN SCHEMA* for the successful data as validated in stage 2

**Note**

The current migration strategy for OBRLS is to migrate only the active loans and only the unpaid installments. The outstanding amount as of migration date is taken as the sanctioned amount for the new loan. Historical data for statement entries is taken as it is for the inquiries in OBRLS.

# 3

## File Upload

The file upload process facilitates users in submitting flat files containing pre-filled data to initiate the migration process. Flat files are specific to entities. This streamlined approach ensures a seamless and accurate transfer of information during the data migration.

### To initiate file upload:

1. On the **Home** screen, click **Loan Services**. Under **Loan Services**, click **Data Migration**.
2. Under **Data Migration**, click **File Upload**.

The **File Upload** screen is displayed.

**Figure 3-1 File Upload**



The **File Upload** screen allows users to:

- **Upload File** - To upload a new file.
- **View File** - To view previously uploaded files.

### Upload File

3. Select the operation type as **Upload File** from the drop-down values.
4. Select **Migration Event** as **OBRL\_Migration**.
5. Select **Entity Name** from the drop-down values. The available options and their applicability with respect to the respective data being mandatory or conditional are detailed below :

**Table 3-1 Entity Name & their applicability**

Entity Details	Mandatory/Optional
Disbursement Instructions	Optional
Disbursement Settlement Details	Optional
Bundle Details	Optional

**Table 3-1 (Cont.) Entity Name & their applicability**

Entity Details	Mandatory/Optional
Insurance Details	Optional
AccountMaster	Mandatory
Account Component	Mandatory
Interest Spreads	Mandatory
Bill Details	Optional
Bill Transaction Details	Optional
Additional Preference Details	Optional
InterestPreferences	Mandatory
CommonSettlementDetails	Mandatory
CollateralDetails	Optional
AccountDisbursement	Mandatory
AccountPartyRelationship	Mandatory
Preferences	Mandatory
Stagedefinition	Mandatory
LendingBalanceBasisDetails	Mandatory
AccountAddress	Optional
PaymentInstruction	Mandatory
AccountFeesPreference	Optional
StatementMaster	Optional
Statement Entries	Optional
Schedule Fees	Optional
Amendment Counter	Optional

- Disbursement Instructions**  
 This entity is about the disbursements that has happened on the account in question. It also provides information for scheduled disbursements, if any.
- Disbursement Settlement Details**  
 This entity is an extension of the previous one on disbursement wherein it provides the settlement data, as applicable to the said account.
- Bundle Details**  
 A product may have a bundle associated to it. The account may or may not be extended the bundle benefits, depending on the bundle definition and the customer involved. This entity provides a comprehensive information on the bundle associated to the account in terms of its contents and applicability.
- Insurance Details**  
 Insurance is one of the many components applicable to a loan product. If applicable, this entity provides details on the type of insurance and related aspects.
- AccountMaster**  
 This entity provides a complete repository of the loan account in terms of the branch, product segment and product that it falls under, alongside further details in the form of currency and associated party.
- Account Component**  
 An account will have multiple components derived from the Product. This data represents the applicability of the respective component to the account and related details in terms of interest basis, accrual applicability, waiver – to name a few.

- **Interest Spreads**  
A Product can have multiple spreads, an account may or may not inherit all the applicable spreads depending on the applicable circumstances, the said entity provides details regarding all the relevant spreads for the account.
- **Bill Details**  
As the name suggests, this entity provides comprehensive information on the bills generated for the customer with the due dates and amounts.
- **Bill Transaction Details**  
This entity is an extension of the Bill details data wherein it provides further information on the bills getting satisfied on the customer making a payment against the same.
- **InterestPreferences**  
Interest preferences are details with respect to the applicability of interest rates and index to the account considering the type of index, rate application and refresh frequency along with the final rate.
- **CommonSettlementDetails**  
Details regarding the settlement and liquidation mode for transactions like disbursement and repayment are provided under this entity.
- **CollateralDetails**  
Details regarding the collateral applicable to the account during disbursement are stored in this entity. The collateral details are in the form of collateral particulars and the amount that is considered for the loan account in question.
- **AccountDisbursement**  
This entity provides details about the disbursement taken place on the account along with additional details on the transaction date and amount considering other components that may be involved during disbursement.
- **AccountPartyRelationship**  
This entity, as the name suggests provides details about the party's relationship with the account from a borrowing perspective – type of relationship, primary or secondary .
- **Preferences**  
The retail lending product enables defining quite a few basic as well as advanced customer facing preferences that are in the form of events in a loan life cycle. This entity provides data regarding the said preferences since onboarding so as to validate the same in the future life cycle in retail lending.
- **Stagedefinition**  
A loan account can have multiple repayment stages starting with equated periodic instalment, moratorium and interest only stages. Each stage can have its own features and interest distribution treatment, as applicable. This entity provides details regarding all such repayment stages, as applicable to the account.
- **LendingBalanceBasisDetails**  
This entity holds the details of the past schedules of interest in terms of basis balance used and also the amount, since it is not going to be calculated in OBRLS. OBRLS also expects at present the due dates for all the future schedules to be present in this table. Schedules which are entirely in the future need not have the amounts populated here as OBRLS calculates them. For schedules within which migration date falls work on a hybrid mode – amount till the migration date is expected to be populated in the amount\_due column and the rest of it would be calculated in OBRLS and the sum of the two would become the total interest amount due for the schedule. This table can also hold the data for the past unpaid fees, which OBRLS applies as-it-is.
- **AccountAddress**  
As the name suggests, this entity provides the address of the account

- **PaymentInstruction**  
Payment instructions are about the pre-configured auto-payment instructions applicable for an account for a certain date range. The auto payment instructions are effected based on the payment instructions.
- **AccountFeesPreference**  
This entity provides details regarding fee components associated to the loan account. Details are in the form of the component details and frequency of fees to be levied for the said account.
- **StatementMaster**  
This entity provides the master details of the statements generated for the account considering the statement frequencies defined at the Product level.
- **Statement Entries**  
This entity is an extension of the Statement master wherein it provides the detailed data extracts of the statement for the account for the same to be stored and made available, as required, based on customer request. It can also hold the historical data, for inquiry purposes.
- **Schedule Fees**  
This entity provides details about the periodic fees associated with the loan account along with the periodicity of the same
- **Amendment Counter**  
The counters as applicable in the existing system need to be populated in this entity, since they are used for validations during future amendments being done in OBRLS.
- [View File](#)  
The **View File** is to view previously uploaded migration flat files.

## 3.1 View File

The **View File** is to view previously uploaded migration flat files.

**To view previously uploaded migration flat files:**

1. Select operation type as **View Files** from the drop-down values.
2. Select **Migration Event** as **OBRL\_MIGRATION**.
3. Select **Entity** as **Entities** as described above.

# 4

## Initiate Migration

**Initiate Migration** allows the data migration process by moving data from object store to staging tables.

**To initiate migration:**

1. On the homepage, click **Loan Services**. Under **Loan Services**, click **Data Migration**.
2. Under **Data Migration**, click **Initiate Migration** .

The successfully uploaded files will be available for the user to initiate the migration activity. The user can select the said files and initiate migration using the 'Start Migration' option.

# 5

## Migration Dashboard

**Migration Dashboard** facilitates stage-wise monitoring of the migration process.

The user can fetch the respective files using the Migration name/ID. The dashboard provides complete information regarding the file details, number of attempts, current migration stage, migration status and counts in terms of success and failures.

# 6

## Monitor Migration

The user is provided additional details on the click of Migration Name/ID wherein it is possible to monitor the stage-wise data. This section on Monitor Migration provides additional information related to the data in question for the respective stage.

The user interface will enable the 'Next Stage' button after the processing in the respective stage is complete. The user can thus manually invoke the status-wise processing in a sequential manner and monitor its progress in a structured manner

# 7

## Migration Maintenance

The maintenance user interface is for future use. The purpose of this maintenance is to modify certain pre-shipped data like:

`DATE_FORMAT` – Date format of the values in any date field

`DELIMITER` – Separator for file contents

`IGNORE_MISSING_COLUMNS` – Configuration to either ignore data for some fields or to validate the same

The above is sample data, this section will be further elaborated when the user interface is made available

# 8

## Sample Entity File formats

The below table describes the sample file formats for the entity files:

**Table 8-1 Entity - File Formats**

Entity Details	File Format
<b>Account Component</b>	For more information on file format of Account Component, refer to the below link: <a href="#">Account Component</a>
<b>AccountDisbursement</b>	For more information on file format of AccountDisbursement, refer to the below link: <a href="#">AccountDisbursement</a>
<b>AccountFeesPreference</b>	For more information on file format of AccountFeesPreference, refer to the below link: <a href="#">AccountFeesPreference</a>
<b>AccountMaster</b>	For more information on file format of AccountMaster, refer to the below link: <a href="#">AccountMaster</a>
<b>AccountPartyRelationship</b>	For more information on file format of AccountPartyRelationship, refer to the below link: <a href="#">AccountPartyRelationship</a>
<b>BasisBalance</b>	For more information on file format of BasisBalance, refer to the below link: <a href="#">BasisBalance</a>
<b>CommonSettlementDetails</b>	For more information on file format of CommonSettlementDetails, refer to the below link: <a href="#">CommonSettlementDetails</a>
<b>InterestPreferences</b>	For more information on file format of InterestPreferences, refer to the below link: <a href="#">InterestPreferences</a>
<b>InterestSpreads</b>	For more information on file format of InterestSpreads, refer to the below link: <a href="#">InterestSpreads</a>
<b>PaymentInstruction</b>	For more information on file format of PaymentInstruction, refer to the below link: <a href="#">PaymentInstruction</a>
<b>Preference</b>	For more information on file format of Preference, refer to the below link: <a href="#">Preference</a>
<b>StageDefinition</b>	For more information on file format of StageDefinition, refer to the below link: <a href="#">StageDefinition</a>

# Index

## I

---

Initiate Migration, [1](#)

## M

---

Migration Dashboard, [1](#)

Migration Maintenance, [1](#)

Monitor Migration, [1](#)

## V

---

View File, [4](#)