Oracle® Financial Services Data Foundation Cloud Service for Banking Object Migration User Guide





Oracle Financial Services Data Foundation Cloud Service for Banking Object Migration User Guide, Release 25C G32951-03

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Get Help in the Applications

Use help icons to access help in the application.

Note that not all pages have help icons. You can also access the <u>Oracle Help Center</u> to find guides and videos.

1.1 Additional Resources

- Community: Use <u>Oracle Cloud Customer Connect</u> to get information from experts at Oracle, the partner community, and other users.
- Training: Take courses on Oracle Cloud from Oracle University.

1.2 Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the <u>Oracle Accessibility Program</u>. Videos included in this guide are provided as a media alternative for text-based topics, and are also available in this guide.

1.3 Get Support

You can get support at My Oracle Support.

For accessible support, visit Oracle Accessibility Learning and Support.

1.4 Get Training

Increase your knowledge of Oracle Cloud by taking courses at Oracle University.

1.5 Join Our Community

Use <u>Cloud Customer Connect</u> to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, and watch events.

1.6 Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to My Oracle Support.

Thanks for helping us improve our user assistance!



1.7 Before You Begin

See the following Documents:

See <u>What's New</u>

Object Migration

Object Migration is the process of defining, exporting and importing objects across environments (prod and non-prod)/instances. This feature also facilitates to migrate within the same setup or different setups.

Objects refer to the various metadata definitions defined for various domains. You may want to migrate objects for several reasons such as manage global deployments on multiple environments or to create multiple environments so that you can separate the development, testing, and production processes.

For example, you can use the object migration feature to define PMF process object such as balance computation on your testing environment. After successful testing, you can use this feature to export the object to production/non-production environment.

2.1 Migrating Object Types

You can create object export and import definitions for the following object types using Object Export/Import feature.

The Migration object types supported by DFCS are:

- Ingest Connectors
- Extract Connectors
- GL Reconcilation Rule

(i) Note

- When a rule is defined with adjustments, import the associated GL Reconcilation Adjustments first, before importing the rule.
- Export/Import of GL Rule implicitly includes TYPE & Entity Configurations.
- GL Reconcilation Adjustments
- PMF Pipelines

(i) Note

- PMF migration for custom connectors should be done only after the underlying connector has already been migrated.
- Migrate Catalog Extension and Custom DQ Rules/Groups, before migrating the PMF pipelines in which they are referred.
- Change Request





(i) Note

You can export only published Change Requests.

Custom DQ Rules/Groups

Note

- During custom DQ Group Export:
 - All the custom DQ rules mapped to a specific group will be exported implicitly.
 - All the custom DO rules mapped to a specific group should belong to a published CR, else Export for such groups will fail.
- During custom DO Group Import:
 - All the custom DQ Rules mapped to a specific group will be imported implicitly.
 - Custom DQ groups and rules will be overwritten in the target if they are already present and their basic properties are in sync with those of the source and are not in Approved/Submitted state in the target.
 - Custom DQ filter will be overwritten in the target, if it is already exists with the same name, for the same entity and is not utilized by any custom DQ rule.
 - Filter import will be skipped, if a filter is already present in the target for the given entity and is mapped to any custom DO rule.

2.2 Prerequisites

Refer to the following prerequisites to be completed before proceeding with the export or import of migration definitions.

Generic

- Upgrade the source and target setups to the same versions. While upgrading, ensure that the both the setups have the same version (including the last significant digit).
- Assign users to new user groups required for Object Migration. For more information about the user groups, refer to User Groups for Using Object Migration Feature.
- Ensure that all objects referenced by the migrated objects are present in the target environment.
- Complete the setup for the following entries in the Admin menu:
 - Compile Fiscal Period
 - Parameter UI

Change Requests - Catalog Extension and Custom DQ Rules/Groups

Entity and Business term structure /properties should be same as source if extensions are manually created in target (Not via Migration) and tries to bring extensions from source.



- Migration from multiple sources for an Extension/custom DQ Extension is not supported as there will be conflicts while migrating in target.
- The Custom objects such as Custom entities and attributes, referred in a Custom DQ should be present in the target.
- The basic properties (for example: base attribute, base entity and rule type) of Custom DQ rules and groups should be same in source and target if they are created outside object migration.

2.3 User Groups for Using Object Migration Feature

The user must be mapped to the following groups, to perform object migration (export/import) in Data Foundation Cloud Service.

- DFBOBJEXPGRP- Data Foundation Object Migration Export Administrator
- DFBOBJIMPGRP- Data Foundation Object Migration Import Administrator

2.4 Accessing Object Export and Import Features

Using the Object Export and Import features, you can create export and import metadata object definitions.

Refer to the following steps, to access Object Migration feature from the Data Foundation Cloud Service (DFCS).

- 1. Login to Data Foundation Cloud Service (DFCS) with valid credentials.
- Click My Profile > Object Migration.
 - Click Object Migration Import, to import the migration object definitions.
 - Click Object Migration Export, to export the migration object definitions.

2.5 Object Import Definitions

Object import definitions a collection of objects that can be imported across environments (prod and non-prod)/instances and also within the same setup or different setups.

Note

 The Catalog extension Import Migration order should be same as that of order of publish in source.

You can view the list of object import definitions that are already created in the **Object Import Summary**. You can also view the following details about each object definition.

- Name The unique name assigned to the collection when the import definition was created.
- Object Migration Status The import status of a specific object definition.
 - Success Indicates that the import is completed successfully.
 - Failed Indicates that the import was not successful. You can restart the migration of the specific object definition.



- Saved Indicates that the object definition is created successfully and is yet to be imported.
- In Progress -Indicates that the import is in progress. Once the import is complete, the status will change to Success/Failed.
- Last Modified By The ID of the user who recently modified it.
 On mouse-over, the Last modified time and date are displayed.

To filter the list and view specific object definition, use one of the following search options.

- To search for a specific import object definition, type the first few letters of the import
 definition that you want to search in the Search box and click Search. The search results
 display the names that consist of your search string in the list of available definitions.
- Enter the number of records to be viewed in a single page, in the **Records** box, at the bottom of the page. You can increase or decrease the number of entries that are displayed using the up and down arrows.
- You can navigate between pages in the View bar, use the navigation buttons present at the bottom of the page.

2.5.1 Creating Object Import Definitions

You can create Import definitions and add Import objects using the Object Migration (export) feature.

- Click Add in the Object Import Summary Page to view the Migration Definition page.
- 2. Enter the following details, in the **Migration Definition** page.
 - ID The unique name for the new import object definition.
 The migration name should not exceed 30 characters and only underscore (_) is allowed.
 - Dump File Select the .DMP file to be uploaded for creating the Import definition.

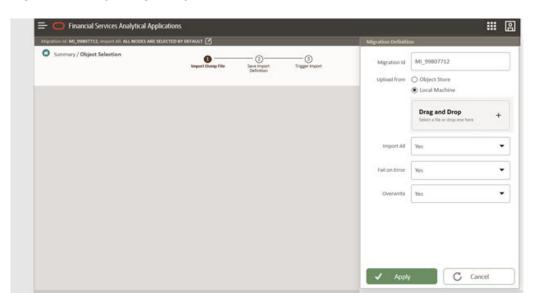


Figure 2-1 Importing Dump File

You can select the dump file using one of the following options:



- Select the option **Object Store**, to select the dump file (.DMP file) from the list of dump files available in the same environment.
- Select the option Local Machine and click Drag and Drop, to add a .DMP file, from the local directory. You can only add dump file that are downloaded using Download Dump file option.

Note

- While creating an Import definition for the first time, always get the Dump file from the Local machine. Once created, this dump file will be stored in the Object store and can be reused for other Import definitions.
- Uploading a dmp file either created or edited locally will generate an error.
- You can rename the .DMP file, if required.
- Import All Select an option to import the nodes that are associated with the selected object type. You can edit this option if required, in the Object Selection page.
 - Yes Imports all the nodes that are included in the dump file.
 - No Imports only those nodes that you can select in the Object Selection page.
- Fail on Error Select an option to proceed with the definition creation in case of an error. You can edit this option if required, in the Object Selection page.
 - Yes Stops the creation process, if error is generated.
 - No Creates the import definition even when error is generated. The node with the error is not included in the object creation.
- Overwrite Select an option to overwrite the existing definition. You can edit this
 option if required, in the Object Selection page.
 - Yes Replaces the existing Import definition.
 - No Creates a new Import definition.

(i) Note

This parameter has no effect when you import Catalog extensions and DQ Rules/ Groups.

3. Click **Apply** to save the details.

The Import definition is created and **Object Selection** Page is displayed. You can add objects to this import definition.

- Click Add to include objects to the definition.
- 5. Select the required **Object Type** from the Object Types drop-down list.

Objects that are defined in the environment with respect to the selected object type are are listed. For example, if Schedule is selected as the Object Type, all the Objects defined with respect to Schedule, in the environment are only listed.

You can also enter the first few letters of the object name in the Search Field, to narrow down the search.

Click the check box adjacent to each object, to include the objects associated with a specific object type, to the import definition.



- Repeat steps 4, 5 and 6, to include objects associated with various object types.
- 8. After adding all the required objects, click **Save**.

The import definition is saved successfully and a confirmation message is displayed. The new definition is listed in the Object Import Summary Page and the status is set to **Saved**.

9. If you want to Save and import the Definition, click Import.

2.5.2 Editing Import Definitions

You can edit the import definitions that are not imported and their status is Saved or Failed.

If the definitions is already imported and the status is set to **Success**, you cannot edit that definition.

To edit an import definition, follow these steps.

 In the Object Import Summary page, hover-over the definition and click Menu, and select Edit.

The **Object Selection** page is displayed.

- Edit the following details, if required, and click Save to changes.
 - Select the required Object Type from the Object Types drop-down list.
 - Select the objects to be added to/deleted from the definition.
- After adding/deleting all the required objects, click Save.

The import definition is saved successfully and a confirmation message is displayed. The new definition is listed in the Object Import Summary page and the status is set to **Saved**.

- 4. Click **Save** to update the changes.
- 5. If you want to Save and import the Definition, click Import.

2.5.3 Importing Object Definitions

After creating the object definitions, you can export them for migrating between environments, using Object Migration (Import) feature.

You can import object definitions in **Edited** state from the object Summary page. Refer to the following steps to import Object definitions.



Issue/Action with Comments can be exported.

- 1. In the Object Summary page, hover-over the definition and click **Menu**.
- 2. Select **Import** from the drop-down menu.

After you import, the following Import status types are displayed:

- Success Indicates that the definition is imported successfully.
- Failed Indicates that the definition was not imported. Right-click and select Import, to restart the import process.
- In Progress -Indicates that the import is in progress. Once the import is completed, the status will change to Success/Failed.



In case the migration fails, refer to Troubleshooting Object Migration - DFCS.

(i) Note

- If a Change Request import fails, then it is recommended not to use the action created for it in the target (if any), otherwise subsequent re-import requests might fail.
- Approve the Change Request and publish, after it is imported successfully.
- After the import of segment extension
 - Creates an Issue with same name as Export Name (Issue name "Issue Exportname") captured with current start and target date with 30 days ahead.
 - Creates an Action with same name as Export Name (Action name-"Action – Exportname") captured with current start and target date with 30 days ahead.
 - Select all Dimensions exported. And action will be in submitted status.
 - After Import, Issue and action owner has to be reassigned accordingly for Approval process.

2.5.4 Re-importing Object Definitions

This feature is enabled only for definitions that are successfully imported.

You can re-import object definitions which are in **Successful** state from the Object Summary page. Refer to the following steps to re-import Object definitions.

Note

Issue/Action with Comments can be exported.

- 1. In the Object Summary page, hover-over the definition and click **Menu**.
- 2. Select **Re-import** from the drop-down menu.

After you re-import, the following Import status types are displayed:

- Success Indicates that the definition is imported successfully.
- Failed Indicates that the definition was not imported. Right-click and select Import, to restart the import process.
- **In Progress** -Indicates that the import is in progress. Once the import is completed, the status will change to Success/Failed.

2.5.5 Viewing Import Object Details

Using the **View** option, you can view the list of objects and the dependancies added to an Object definition. You can also view the object details.

1. Mouseover the migration definition and click **Menu**.



- Select View. The object types, list of objects and the dependent objects added to the export definition are listed in the left pane.
- Double-click an object to view the object attribute details.

2.5.6 Viewing Object Import Log Details

View log facilitates you to view the log information of the object definition with the migration status.



The View Log page for a definition with migration status **Saved** will be empty.

To view the log details of definition with migration status **Success** or **Failed**, follow these steps.

- In the Object Import Summary window, mouseover the migration definition and click Menu.
- Select View Log from the drop-down menu, to access the View Log page.

The migration status with following details is displayed.

- Object Migration ID The migration ID associated with the import object.
- **Object Type** The object type of the import object.
- **Object Code** The object code associated with the import object.
- **Creation Date** The date of creation of the import object.
- **Created By** The User Id of the User who created the import object.
- **Status** The import status of the specific object.
 - Success Indicates that the specific object was imported successfully.
 - **Failed** Indicates that the specific object was not imported.
- Import Status Message The complete import status message.



(i) Note

Import status message currently not supported for GL reconcilation.

Click **OK** to close the page, after viewing the log details.

2.5.7 Deleting Import Definition

You can delete only definitions that are set to Saved or Failed status.

To delete an import definition, follow these steps.

- In the Object Import Summary page, mouseover the definition to be deleted and click Delete .
- Click **Yes** to confirm and proceed with the deletion.

Object Export Definitions

Object Export Definition is a collection of objects that can be exported across environments (prod and non-prod)/instances and also within the same setup or different setups.



(i) Note

You can export only published Change Requests.

You can view the list of object export definitions that are already created in the **Object Export Summary**. You can also view the following details about each object definition.

- Name The unique name assigned to the collection when the export definition was created.
- Object Migration Status The export status of a specific object definition.
 - **Success** Indicates that the export is completed successfully.
 - Failed Indicates that the export was not successful. You can restart the migration of the specific object definition.
 - Saved Indicates that the object definition is created successfully and is yet to be exported.
 - In Progress -Indicates that the export is in progress. Once the export is complete, the status will change to Success/Failed.
- Last Modified By The ID of the user who recently modified it. On mouse-over, the Last modified time and date are displayed.

To filter the list and view specific object definition, use one of the following search options.

- To search for a specific export object definition, type the first few letters of the export definition that you want to search in the Search box and click Search. The search results display the names that consist of your search string in the list of available definitions.
- Enter the number of records to be viewed in a single page, in the **Records** box, at the bottom of the page. You can increase or decrease the number of entries that are displayed using the up and down arrows.
- You can navigate between pages in the View bar, use the navigation buttons present at the bottom of the page.

3.1 Creating Export Definitions

You can create export definitions and add export objects using the Object Migration (export) feature.

- Click **Add** in the **Object Export Summary** Page to view the **Migration Definition** page.
- Enter the following details, in the **Migration Definition** page.
 - Migration Name: The unique name for the new export object definition.



The migration name should not exceed 30 characters and only underscore (_) is allowed.

- File Name: The system auto-creates the file name of the business objects that can be used to export the definition in the format: Migration Name_BO_Time Stamp (MMDDYYY HHMMSS)
- 3. Click **Apply** to save the details.

The export definition is created and **Object Selection** Page is displayed. You can add objects to this export definition.

- 4. Click **Add** to include Migration objects to the definition.
- 5. Select the required **Object Type** from the Object Types drop-down list.

Objects that are defined in the environment with respect to the selected object type are are listed. For example, if PMF_Process is selected as the Object Type, all the Objects defined with respect to PMF_Process, in the environment are only listed.

You can also enter the first few letters of the object name in the **Search** Field, to narrow down the search.

- 6. Click the check box adjacent to each object, to include the objects associated with a specific object type, to the export definition.
- 7. Repeat steps 5 and 6, to include objects associated with various object types.
- 8. After adding all the required objects, click Save.

The export definition is saved successfully and a confirmation message is displayed. The new definition is listed in the Object Export Summary Page and the status is set to **Saved**.

9. If you want to Save and Export the Definition, click Export.

3.2 Editing Export Object Definitions

You can edit the Export object definitions that are not exported and their status is **Saved** or **Failed**.

If the definitions is already exported and the status is set to **Success**, you cannot edit that definition.

To edit an Export object definition, follow these steps.

 In the Object Export Summary Page, mouseover the definition and click Menu, and select Edit.

The **Object Selection** page is displayed.

- Modify the following details, if required, and click Save to changes.
 - Select the required Object Type from the Object Types drop-down list.
 - Select the objects to be added to/deleted from the definition.
- 3. After adding/deleting all the required objects, click **Save**.

The export definition is saved successfully and a confirmation message is displayed. The new definition is listed in the Object Export Summary Page and the status is set to **Saved**.

4. If you want to Save and Export the Definition, click **Export**.



3.3 Exporting Object Definition

After creating the object definitions, you can export them for migrating between environments, using Object Migration (Export) feature.

You can export object definitions in **Saved** or **Failed** state from the object Summary page.Refer to the following steps, to export definitions.

- 1. In the Object Summary Page, highlight the migration definition and click Menu.
- 2. Select **Export** from the menu.

After you export, the following Export status types are displayed:

- Success Indicates that the definition is exported successfully.
- Failed Indicates that the definition was not exported. Right-click and select Export, to reintiate the export process.
- In Progress -Indicates that the export is in progress. Once the export is completed, the status will change to Success/Failed.

3.4 Re-exporting Object Definition

This feature is enabled only for definitions that are successfully exported.

You can re-export object definitions which are in **Successful** state from the Object Summary page. Refer to the following steps, to export definitions.

- 1. In the Object Summary Page, mouse-over the migration definition and click **Menu**.
- Select Re-export from the menu.

After you export, the following Export status types are displayed:

- Success Indicates that the definition is exported successfully.
- Failed Indicates that the definition was not exported. Right-click and select Export, to reintiate the export process.
- In Progress -Indicates that the export is in progress. Once the export is completed, the status will change to Success/Failed.

In case the migration fails, refer to <u>Troubleshooting Object Migration - DFCS</u>.

3.5 Viewing Export Object Details

Using the **View** option, you can view the list of objects and the dependancies added to an Object definition. You can also view the object details.

- 1. Highlight the Export definition and click Menu.
- 2. Select **View**. The object types, list of objects and the dependent objects added to the export definition are listed in the left pane.
- 3. Double-click an object to view the object attribute details.



3.6 View Object Definition Export Log Details

View log facilitates you to view the export log information of the object definition with the migration status.

Note

The View Log page for an object definition with status Saved will be empty.

To view the log details of object with migration status **Success** or **Failed**, follow these steps.

- 1. In the Object Export Summary page, mouseover the object definition and click Menu.
- Select View Log from the drop-down menu, to access the View Log page.

The migration status of the objects with following details is displayed.

- Object Migration ID The migration ID associated with the definition.
- Object Type The object type of the definition.
- Object Code The object code associated with the definition.
- Creation Date The date of creation of the definition.
- Created By The User Id of the User who created the definition.
- Status The migration status of the definition.
 - Success Indicates that the export migration was completed successfully.
 - Failed Indicates that the export migration did not complete.
 - Export Status Message The complete export status message.

(i) Note

Export status message currently not supported for GL reconcilation.

3. Click **OK** to close the page, after viewing the log details.

3.7 Downloading Dump File

You can download the export dump file for exported definitions to a local directory, using Download Dump file option.

The downloaded export dump file can be used to upload objects to a different environment.

Note

This option is enabled, only if the definition is exported successfully and the **Migration Status** is set to **Success**.

To download a export dump file, refer to the following procedure.

1. Mouseover a migrated object and select Menu.



2. Select **Download Dump File** from the drop-down menu, to download the associated dump file and store it to the local directory.

3.8 Deleting Export Object Definition

You can delete only definitions that are set to Saved or Failed status.

To delete a export object definition, follow these steps.

- In the Object Export Summary page, mouseover the definition to be deleted and click Delete.
- 2. Click **Yes** to confirm and proceed with the deletion.

Troubleshooting Object Migration - DFCS

Refer to the following troubleshooting.

Custom DQ Import Failed

In case, the migration of Custom DQ definitions doesn't complete, verify the following points. Ensure to complete these requirements before proceeding with the custom DQ migration.

- The referenced object not present in target.
- Basic definition of custom DQ objects already present in the target are not in sync with that
 in source. Following basic properties for custom DQ objects should be in sync between
 source and target:
 - Entity, Attribute Name and DQ Type for Custom DQ Rule.
 - Base entity /Base group for Custom DQ Group
- Custom DQ Objects already present in target are in Approved/Submitted state in target.

Connector Import Failed

When the connector import is not successful, ensure to verify the following details and complete the prerequisites.

- The attributes in the entity used in the migrated connector (for both Extract and Insert connector), must be the same in source and target environments.
- When a connector with the same name is already available in the target environment, the imported connector will overwrite based on the set overwrite option.
- OOTB Extract connector is the only valid OOTB metadata during the import.
- When a connector is migrated, all the underlying metadata of EDD and Parameters are also migrated.

Catalog Extension Import Failed

- The Catalog extension import might fail due to the following validation checks, during import migration. Correct the error and retry the import.
 - The referenced object not present in target
 - The object is already present in the target, while creating a Object using Object migration import feature.
 - The grain/BT/Dimension being imported is already used by another action in the target.
 - The action Name is already present in target
 - The issue associated to the action being imported is closed in the target.

Persistent Errors - Catalog Extensions

You cannot proceed with the catalog extension import, if you encounter one of the following scenarios:



- Even if one of the objects are present in the target environment, for the imported change request, then the import will fail. It won't partially import the objects which are not present in the target.
- During Fact Extension Migration, if in the source, the BT used in fact extension is referencing to a different dimension entity than the target.
- During Create Dimension Migration, if another custom dimension exist in the target with different logical name but it has the same BT as Business key of the dimension being migrated.

Possible Reasons for "Issues And Action Details Is Not Found" Error During Catalog Extension /Custom DQ Import

- If the target date of the issue associated to the action being imported is expired in the target.
 - **Solution**: Manually update the target date of such an issue with the current/future date in the target environment and try importing again.
- If the issue associated to the action being imported is closed in the target.

CR Re-import Requests Are Failing Repeatedly for Catalog Extension/Custom DQ Import

If CR re-import requests are failing even after 4 to 6 hours of first import request of that CR and the following error is present in the log file: **CR can not be reprocessed as import request is still ongoing for it**, contact OFSAA customer support.

CR cannot be reprocessed as its objects are already used

If this error message is displayed in the logs during Catalog Extension/Custom DQ CR import, then created action is moved to **Submitted/Approved/Published** state.

Solution: Submit the action if it was returned and proceed with re-import.

Unable to Submit the Action because following Custom DQ Rules are not mapped to any DO Group in the current Action

If the custom DQ import fails and the above error message is displayed, the mapped Group for the erroneous rules might have moved to a different action in the source while editing.

Solution: Migrate the CR consisting the custom DQ Group belonging to the erroneous rules listed in the logs.

Aborting the Import as the Data Quality Rule is in Approved/Submitted state

If this error message is displayed in the logs during Custom DQ CR import, then the Custom DQ Rule/Group being migrated is already present in the target environment but can not be overwritten as it is in **Approved/Submitted** state.

Solution: Move the Custom DQ Rule/Group to **Returned** state in target if it is in **Submitted** state or publish it if it is in **Approved** state.

Basic Validation has failed for Custom DQ Rule/Group

If this error message is displayed in the logs during Custom DQ CR import then, another Custom DQ Rule/Group present with the same name but with different basic properties, is already present.

Solution:



- If Basic Validation has failed for Custom DQ Rule, create a new Custom DQ Rule and then
 map it to the appropriate group. Unmap the old rule with basic properties that are not
 matching between source and target and retry migration.
- If Basic Validation has failed for Custom DQ Group, create a new Custom DQ Group with a
 different name and map all the appropriate rules and try migrating this new group instead.

Custom Object Dependency check failed for Custom DQ Rule/Filter: <Rule/Filter Name>. <Referencing Dimension Name> is not an eligible Reference Dimension or <Joining Attribute Name> is not an eligible joining attribute for <Base Entity Name>

If this error message is displayed in the logs during Custom DQ CR import, then for a Dimension Referencing Comparison Custom DQ Rule or in one of the Custom DQ Filter's dimension referencing condition, either Referenced dimension is not related to base entity or joining attribute is not an eligible joining attribute in the base entity for the referenced Dimension.

Solution: A dimension is related to the base entity only when that dimension's business key attribute is present in the base entity or it is sharing definition with an existing attribute of base entity, and such attribute of base entity (which is a business key of a dimension or sharing its definition with a business key of a dimension) is known as Joining Attribute for the Referenced Dimension. Ensure the referencing dimension and joining attribute are as per the above definition.