Oracle® iSetup

User Guide

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Oracle iSetup User Guide, Release 11*i*

Part No. B10695-04

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Send Us Your Comments

Oracle iSetup User Guide, Release 11*i*

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Preface

Intended Audience

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

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

- The principles and customary practices of your business area.
- Oracle iSetup.
- The Oracle Applications graphical user interface.

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

See Related Documents on page viii for more Oracle Applications product information.

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Structure

1 Introduction

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

2 Configuring iSetup

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

3 iSetup Home

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

4 Instance Mapping

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

5 Migrations

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

6 Reports

This chapter helps you to generate standard or comparison reports. You can generate new reports or view existing reports.

A Selection Set Templates

Oracle iSetup provides you with a set of Selection Set templates. This chapter provides information on these selection sets.

Glossary

Related Documents

Other Information Sources

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

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

Online Documentation

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

- **PDF Documentation -** See the Online Documentation CD for current PDF documentation for your product with each release. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help -** You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply

to your system for updated implementation and end user documentation. No system downtime is required to apply online help.

- **Release Content Document -** See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on Oracle*MetaLink*.
- **About document -** Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on Oracle*MetaLink*.

Related Guides

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

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

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

Guides Related to This Product

Oracle XML Database Developer's Guide

This guide describes how to enable the XML DB feature. It also provides information about managing and configuring Oracle XML DB applications.

Oracle Cash Management User Guide

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

Oracle Assets User Guide

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

Oracle General Ledger User Guide

This guide explains how to plan and define your chart of accounts, accounting period types and accounting calendar, functional currency, and set of books. It also describes how to define journal entry sources and categories so you can create journal entries for your general ledger. If you use multiple currencies, use this manual when you

define additional rate types, and enter daily rates. This manual also includes complete information on implementing Budgetary Control.

Oracle Payables User Guide

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

Oracle Receivables User Guide

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

Oracle Purchasing User's Guide

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

Oracle Inventory User's Guide

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

Oracle Order Management User's Guide

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

Oracle Engineering User's Guide

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

Oracle Bills of Material User's Guide

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

Oracle Advanced Pricing User's Guide

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

Oracle Advance Planning Implementation and User's Guide

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

Oracle Work in Progress User's Guide

This guide describes how Oracle Work in Process provides a complete production management system. Specifically this guide describes how

discrete, repetitive, assemble–to–order, project, flow, and mixed manufacturing environments are supported.

Oracle Enterprise Asset Management User's Guide

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

Oracle Shipping Execution User's Guide

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

Oracle Quality User's Guide

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

Oracle Public Sector Financials (International) User's Guide

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

Oracle Applications User's Guide

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

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

Oracle HRMS Documentation Set

This set of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and organizations using Oracle HRMS windows. Specifically, the following manuals will help you set up employees and operating units:

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

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

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Upgrading Oracle Applications

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

"About" Document

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

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

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Applications and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you

may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

1

Introduction

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

This chapter covers the following topics:

- About Oracle iSetup
- Footprint
- Usage Scenarios

About Oracle iSetup

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

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

  Note: Transforming the attributes is an optional step.

Footprint

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

- Oracle Application Object Library (AOL)
- Oracle Financials
- Oracle Human Resources Management System
- Oracle Manufacturing

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

Usage Scenarios

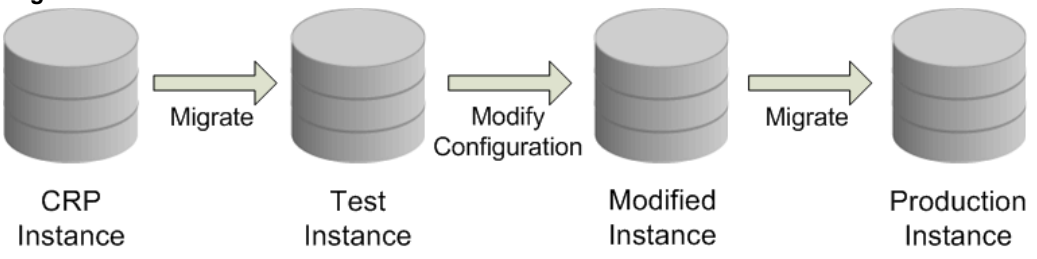
There are many scenarios where Oracle iSetup can be used. Following are some of these:

Migrate Data

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

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

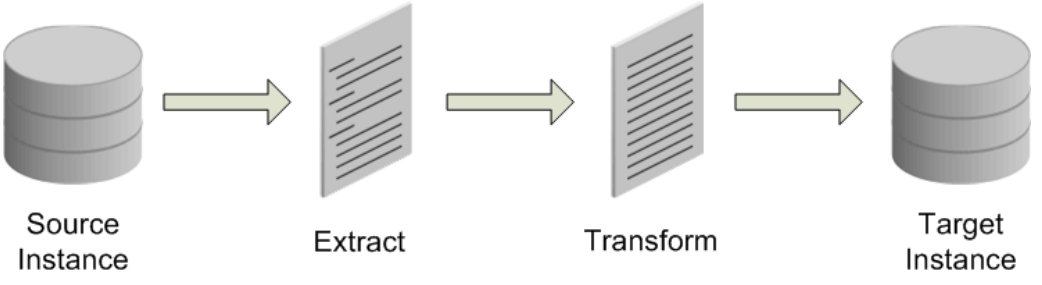
Migrate Data



Transform Data

The Test instance is configured. Using Oracle iSetup you have extracted the data. You want to transform select data and load to the target instance. Oracle iSetup helps you to transform the data and load it to the target instance.

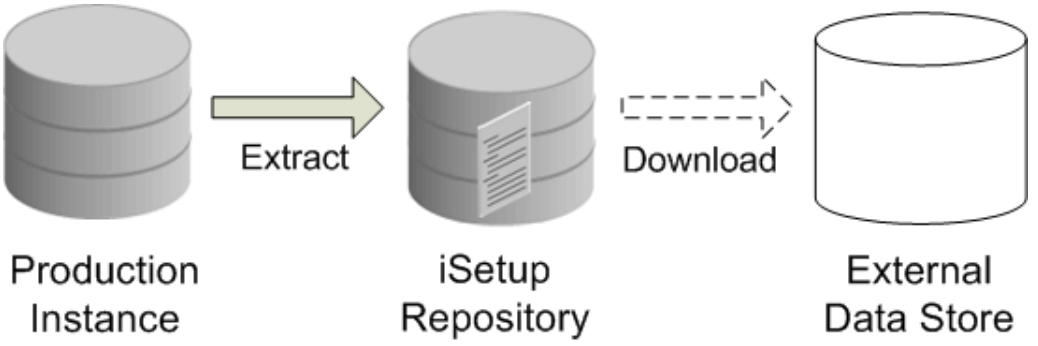
Transform Data



Save Configuration

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

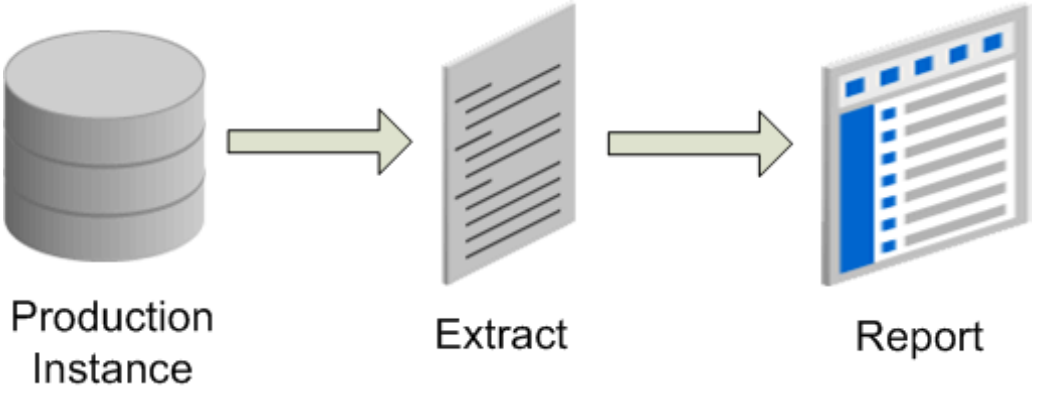
Save an Extract



Report on Current Configuration

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

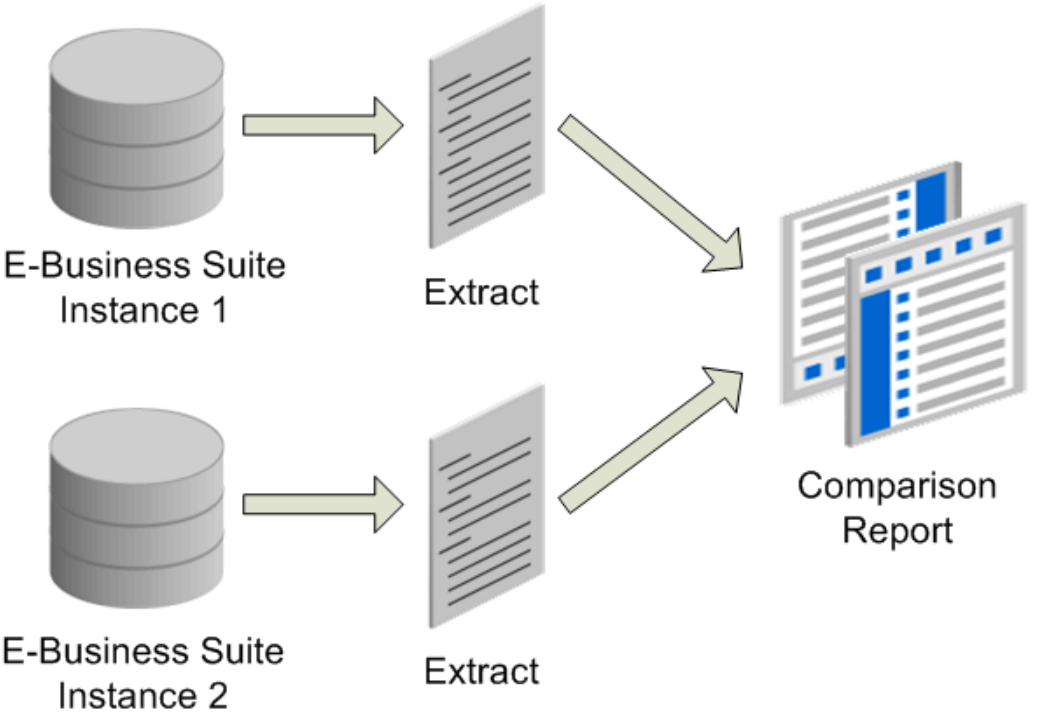
Generate Report



Comparison Reporting

Compare the differences in data between the production instance and the test instance.

Comparison Report



2

Configuring iSetup

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

This chapter covers the following topics:

- Prerequisites
- Instance Overview
- Using Oracle iSetup

Prerequisites

Following are the prerequisites for this release of Oracle iSetup:

- The Source, Central and the Target instances must be at the same patch set level. For more information, see Instance Overview, page 2-1.
- The Oracle database version should be 9.2.0.5.0 or later with the 11.i.10 release of the Oracle E-Business suite.
- The XML DB feature must be enabled. For more information on this feature, see Oracle9i XML Database Developer's Guide.

Instance Overview

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

Types of Instances

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

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

  Note:

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

Preparing an Instance

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

1. **Recompile Database Objects**

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

2. **Set Open Cursor Limit**

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

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

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

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

4. **AZ: VO Fetch Size**

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

5. **AZ: Commit Row Counts**

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

6. **AZ: CP Number Of Batches**

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

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

7. **AZ: Reporter Max Records**

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

8. **AZ: Number Of Records For Home Tab** This profile option specifies the number of most recent Extracts, Loads, and Reports to be displayed on the Home screen. It is recommended to set this value to 4.

Using Oracle iSetup

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

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

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

2. **Choose a Responsibility**

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

3. **Choose Function**

   Menu options for this responsibility are:

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

   Migrations: This menu provides links to Selection Sets, Extracts, Transforms, and Loads. Each of these links take you to their respective screens.

   Reports: This menu provides links to Standard Reports and Comparison Reports. Clicking on them takes you to the respective screens.

   Administration: Instance Mapping under this menu takes you to the Instance Mapping screen.

3

iSetup Home

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

This chapter covers the following topics:

- Home Page

Home Page

The home page in Oracle iSetup provides you information and lets you reach the required functionality with the least effort.

iSetup Home Page

Navigation

This screen displays the following:

Most Recent Objects

The Home Page lists the most recent Extracts, Loads and Reports.

- **Most Recent Extracts:** Lists the latest Extracts that you have created. Click Full List for a list of all existing Extracts.

- **Most Recent Loads:** Lists the latest Loads that you have created. Click Full List for a list of all existing Loads.
- **Most Recent Reports:** Lists the latest Reports that you have created. Click Standard Reports for a list of all existing Standard reports. Click Comparison Reports for a list of all existing Comparison reports.

  Note: The AZ: Number Of Records For Home Tab profile option specifies the number of records to be displayed for each of the Extracts, Loads, and Reports.

Shortcuts

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

- Instance Mapping
- Selection Sets
- Extracts
- Transforms
- Loads
- Standard Reports
- Comparison Reports

Search Panel

The Home Page provides a Search panel that you can use to search for specific objects of the following components:

- Selection Sets
- Extracts
- Transforms
- Loads
- Standard Reports
- Comparison Reports

Others

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

4

Instance Mapping

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

This chapter covers the following topics:

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

Overview

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

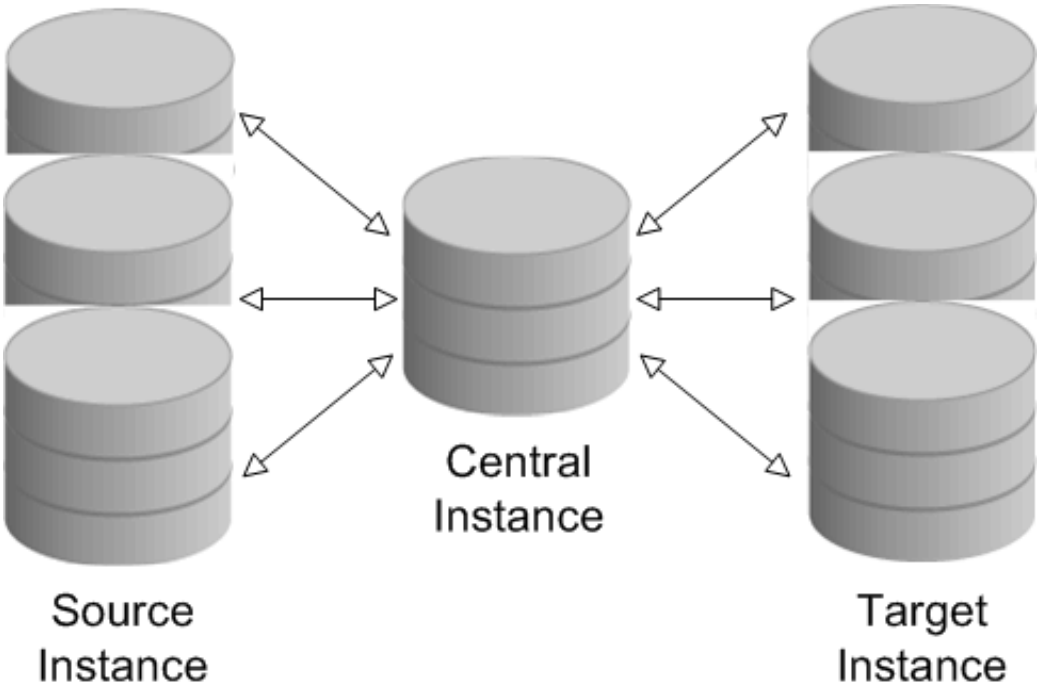
The Administration tab lets you create and maintain instance mappings. These instances appear as a list of values for the source and target instances in the Extracts and the Loads screens.

The DBC file is used to connect to the instance to process any Extract or Load request.

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

The instance mapping topology is shown in the following figure:

Instance Mapping Topology



Prerequisites

Following are the prerequisites for mapping an instance:

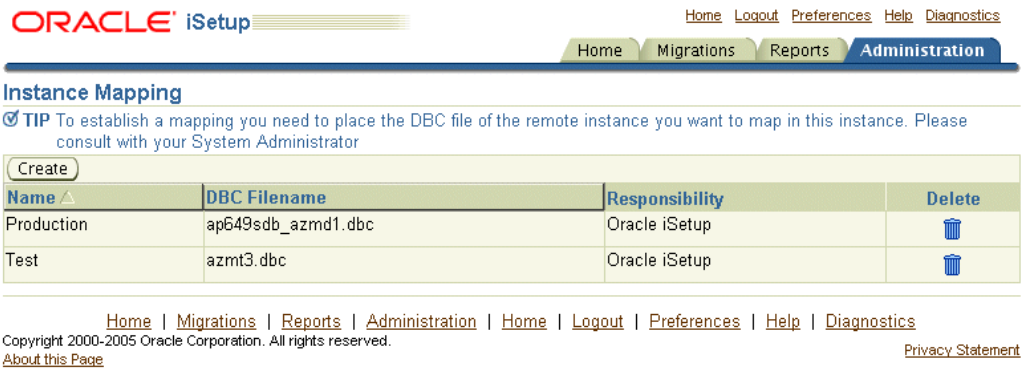
- The remote instance must have the Database Configuration (DBC) file for the central instance.
- The central instance must have a DBC file for each remote instance.
- The DBC file name is case-sensitive.
- Each instance to be mapped must have the same, valid user created as that logged into the central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

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

Instance Mapping

The Instance Mapping screen displays the instance mappings that are already present. If you have not created any instance mappings, the table would be empty.

Administration: Instance Mapping



The Instance Mapping table consists of the following columns:

- **Name** Displays the name you specified during instance mapping.
- **DBC Filename** Displays the database file name you have specified.
- **Responsibility** Displays the responsibility used to create the mapping. For all mappings, this must be 'Oracle iSetup responsibility'.

Note:

- At any time, a maximum of 10 records appear in the table.
- You can click on some of the column headers to sort the records.
- By default, the table is sorted on instance name.

To maintain Instance Mappings, you can perform the following actions from this screen:

Create: Click **Create** to create a new instance mapping. This takes you to the Create Instance Mapping screen, page 4-3.

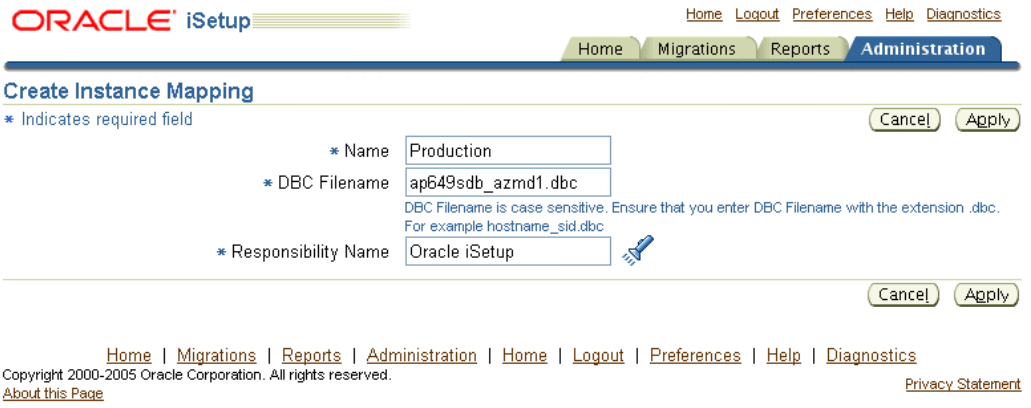
Deleting an Instance Mapping

Click the delete icon to delete an instance mapping. Confirm the delete in the Warning screen. Once a mapping has been deleted, it cannot be used as a source or a target instance for a new migration. Any load process that was not completed cannot be restarted if the target instance has been deleted. It is recommended that you do not delete an instance mapping till all the extract or load processes involving this instance mapping are completed.

Creating an Instance Mapping

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

Administration: Create Instance Mapping



Following are the steps to create a new instance mapping:

1. **Navigate to the Create Instance Screen**

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

2. **Enter Mapping Parameters**

   1. Enter a unique instance mapping name. It is used in the source and target instance drop-down boxes on the Extract and Load screens.
   2. Enter a DBC file name for mapping.

      The DBC filename is case sensitive.

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

3. **Select Responsibility**

   Select the Oracle iSetup responsibility from the list of values.

4. **Save New Instance mapping**

   Click **Apply** to save the new instance mapping. This takes you back to the Administration screen with a confirmation that the instance is mapped.

   Note:

   - The DBC file is generated as part of the Rapid Install of Oracle Applications
   - You can generate the DBC file using the Admin AppServer Tool. The Admin AppServer Tool is a Java utility that you can run from the command line. The Oracle Applications System Administrator's Guide describes how to use this tool.
   - For more information on the contents of the DBC file, see Oracle Applications System Administrator's Guide.

5

Migrations

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

This chapter covers the following topics:

- Overview
- Selection Sets
- Extracts
- Transforms
- Loads

Overview

Data migration is a four-step process:

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

Selection Sets

Selection Sets are the building blocks for the migration process. Oracle iSetup provides a set of templates that you use to create a selection set.

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

Selection Sets

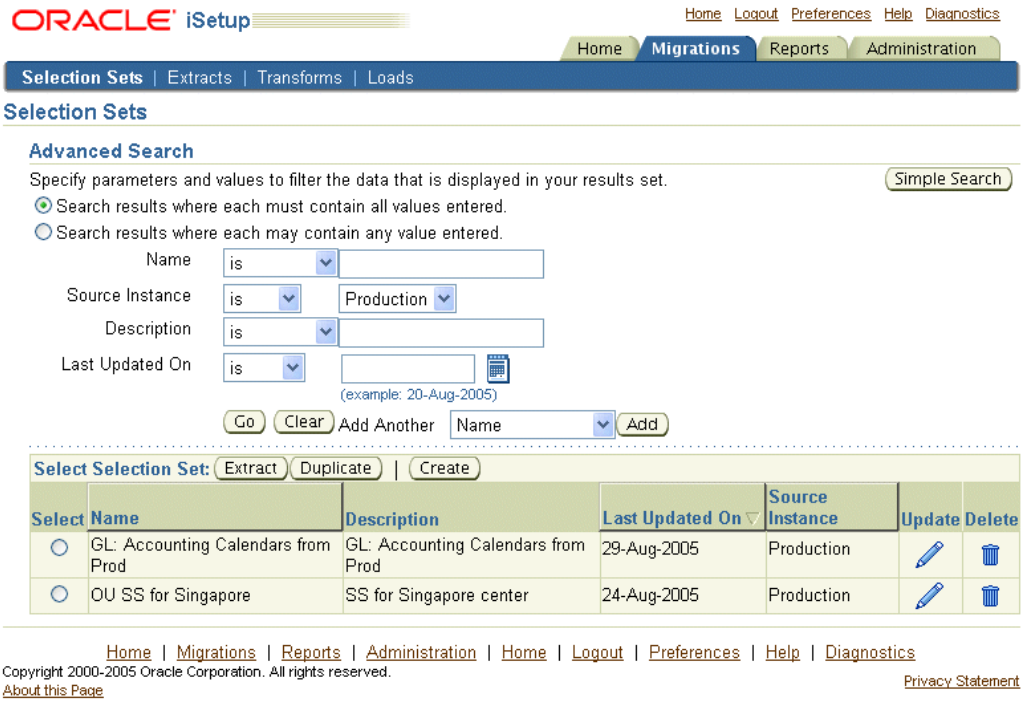
Search for a Selection Set

You can either do a Simple Search or an Advanced Search to find a selection set.

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

- Name
- Source Instance
- Description
- Last Updated On

Advanced Search on Selection Sets



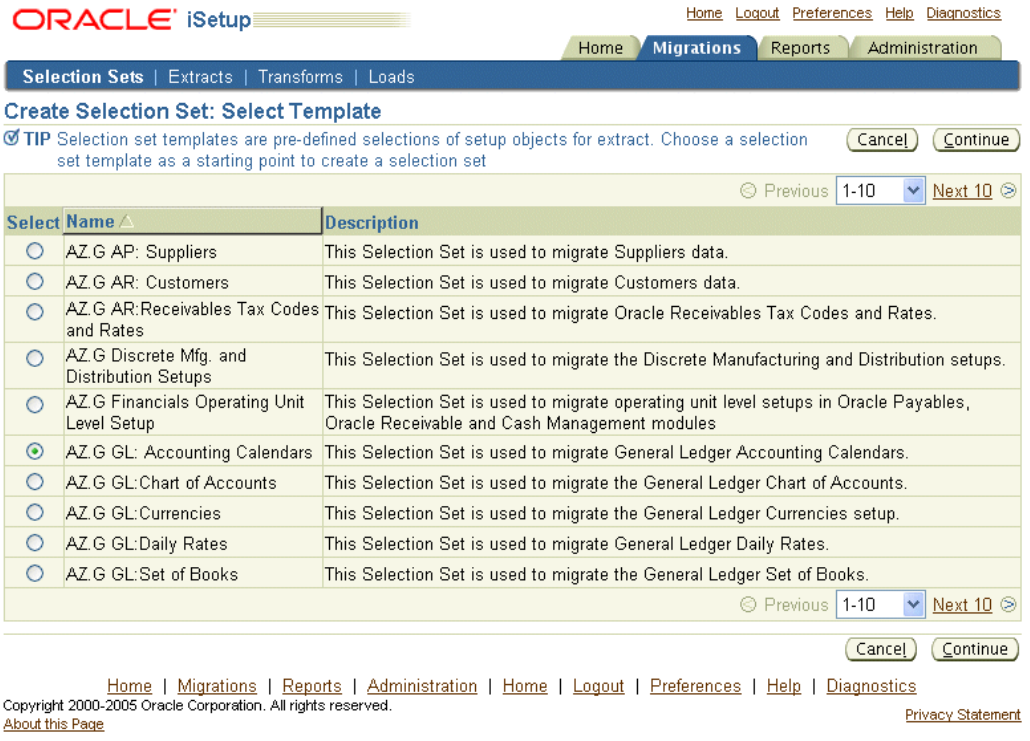
Creating a Selection Set

Click on Create in the Migrations: Selection Sets screen to create a selection set.

Following are the steps to create a selection set:

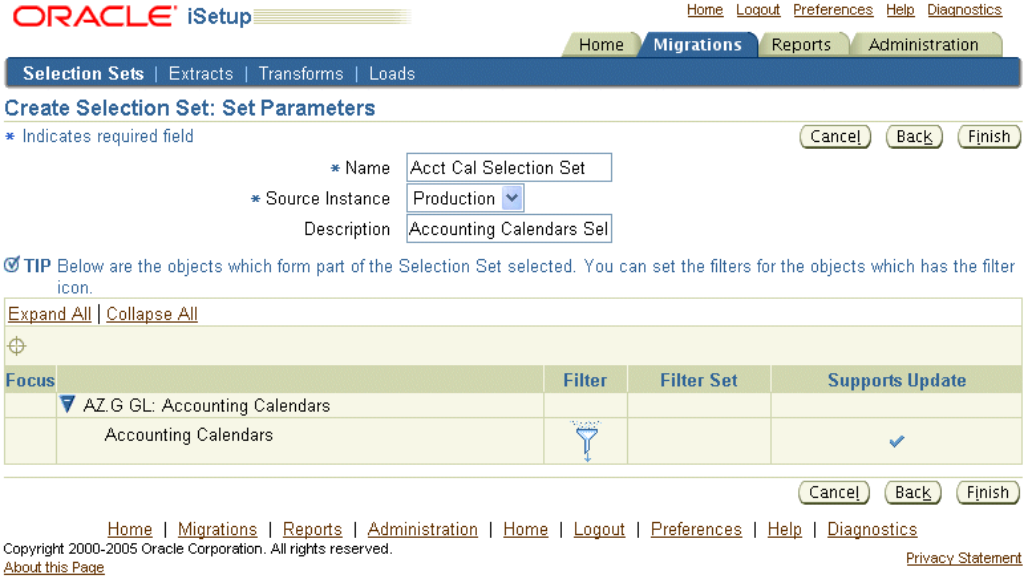
1. **Select a Template:** Select a template from the available list of selection set templates. Each template consists of a specific set of data objects. For more information on objects within each selection set, see Selection Sets, page A-1.

Create Selection Set: Select Template

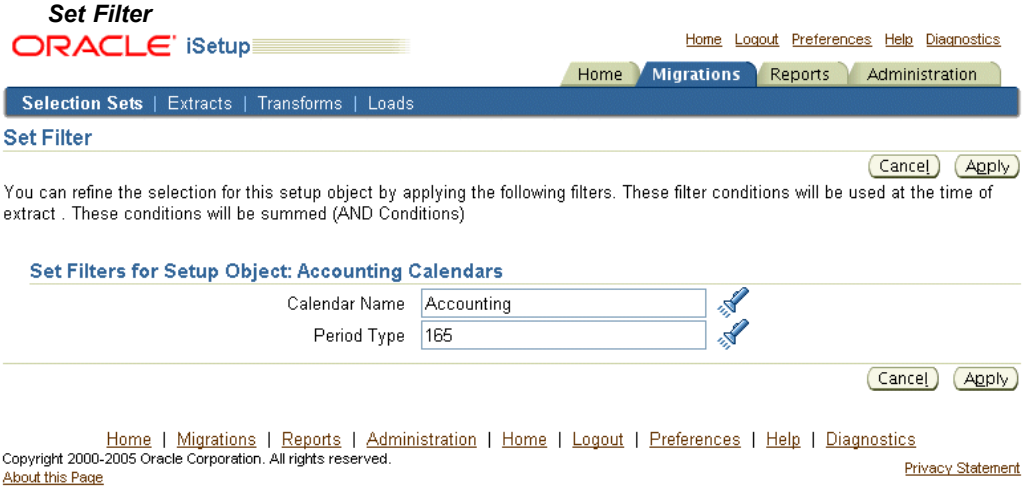


2. **Name:** Enter a unique name for the selection set. This is a required field.
3. **Source Instance:** Select the source instance. This helps you to set filters for the data objects during extraction. This is a required field.
4. **Description:** Provide informative description that could help in identifying the selection set.

Create Selection Set: Set Parameters



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



Following are the steps to set filters:

1. Click the Filter icon. All filterable attributes appear on the screen.
2. You can also search for values to set the filter on. To search, click the Search icon. In the new window, search and select the value you want to filter on. These values are retrieved from the selected source instance.

   You can filter on more than one condition and the result is a filter of all the conditions.
3. Click Apply. You are routed back to the Create Selection Set: Set Parameters screen.

6. Click Finish to set the filter.

   This takes you to the Selection Set screen with a confirmation that the selection set is created.

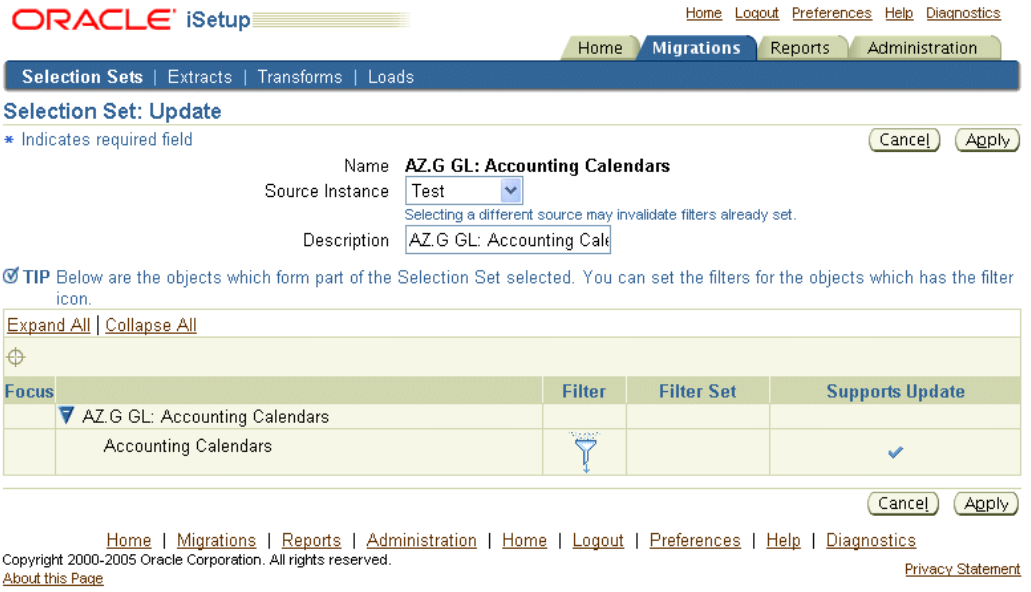
   Note:

   - The Supports Update flag indicates if the data object updates the target data during load.
   - Only instances mapped using the Administration > Instance Mapping page are available as source instance during creation of the selection set.
   - Some FND objects have predefined filters already set.

Updating a Selection Set

You can change the Source Instance, Description field, or the Filter Criteria for a selection set. However, changing the source instance may invalidate previous filter settings.

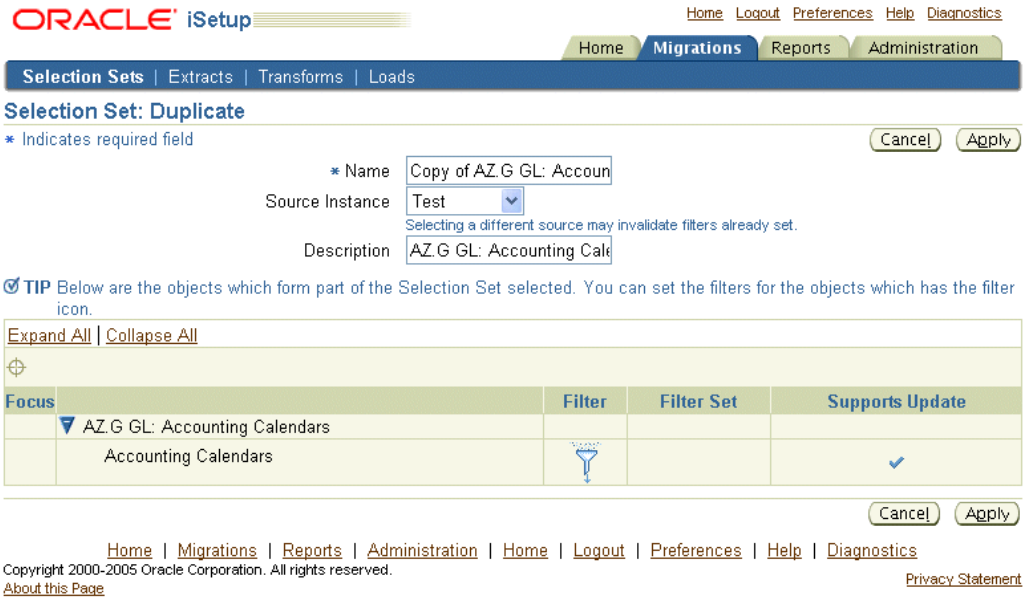
Selection Set: Update



Duplicating a Selection Set

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

Selection Set: Duplicate



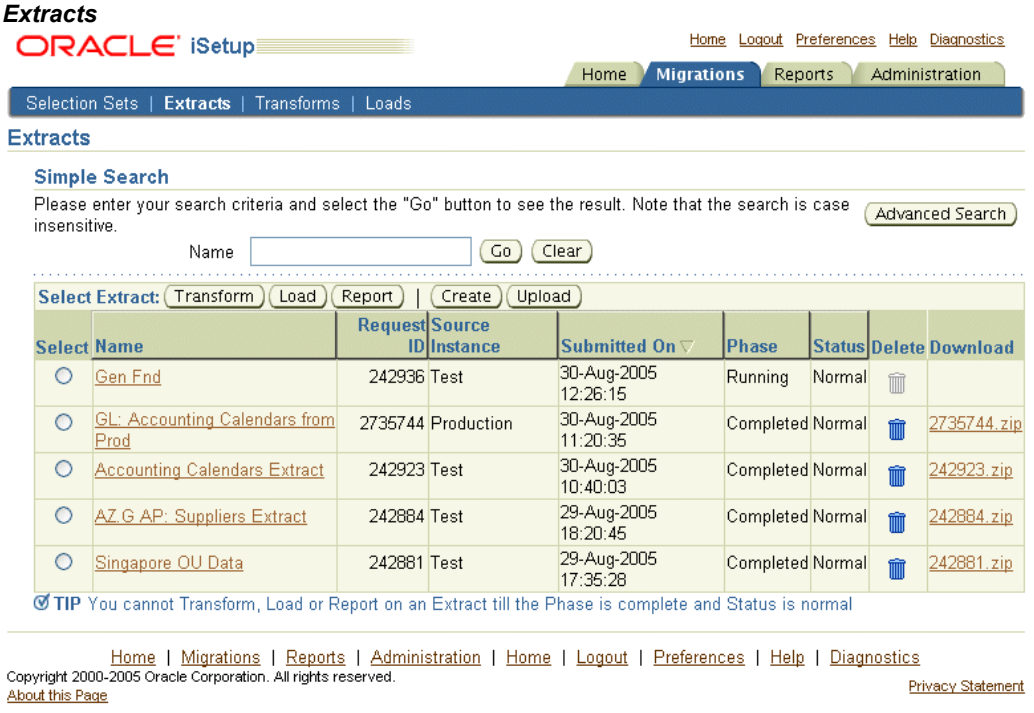
Deleting a Selection Set

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

Extracts

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

Extracts



Prerequisites

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

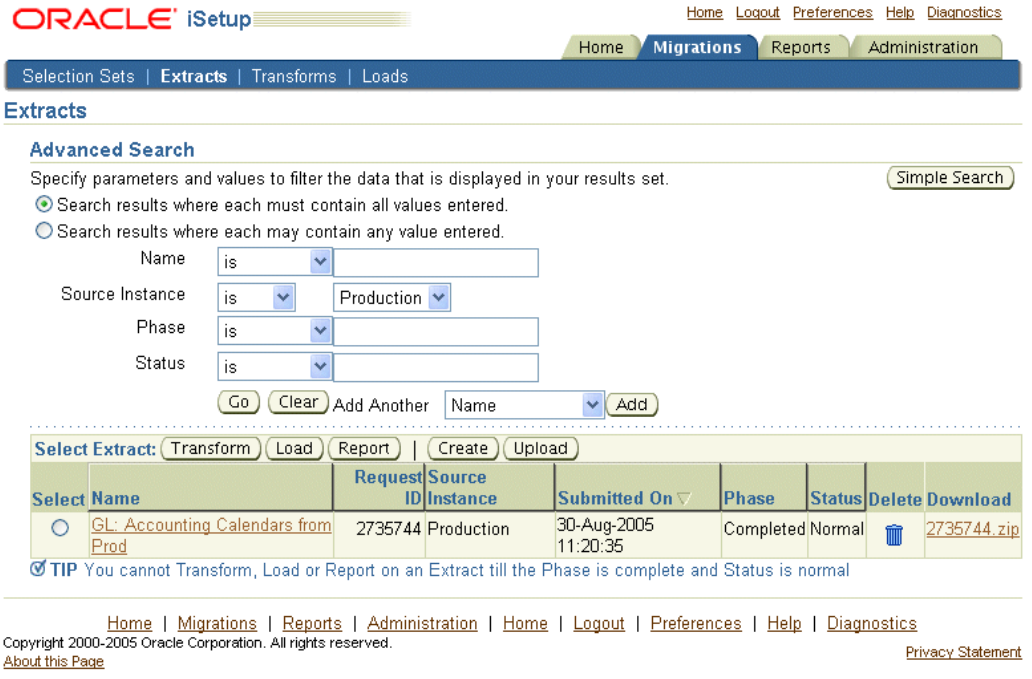
Search for an Extract

You can either do a Simple Search or an Advanced Search to find an Extract.

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

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

Advanced Search for Extracts

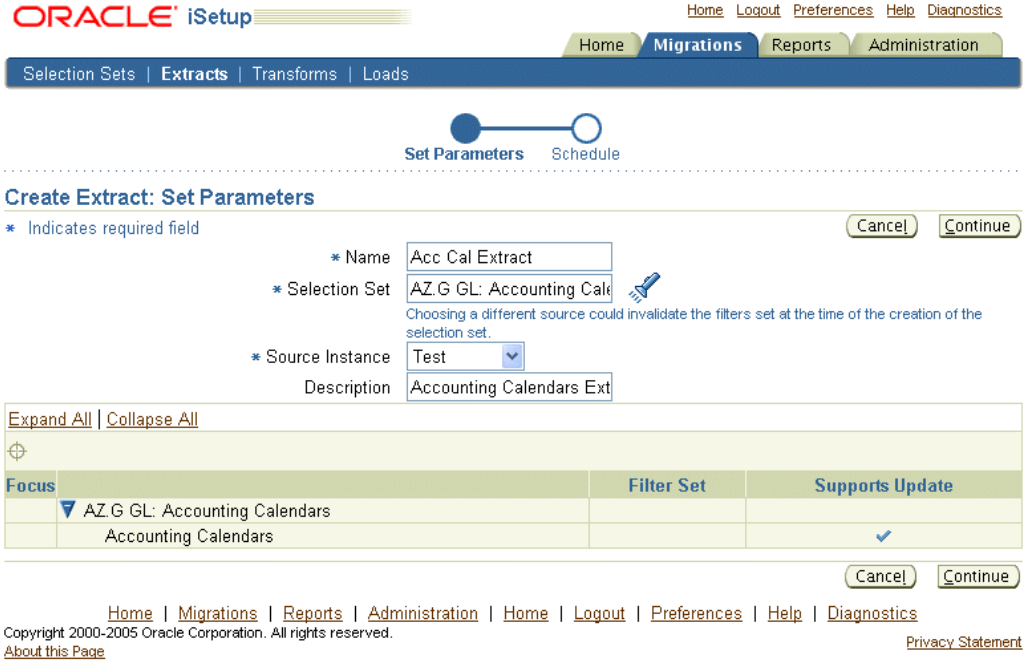


Creating an Extract

Click on Create in the Migrations: Extracts screen to create an Extract.

Alternatively, select a selection set form the Selection Sets screen and click Extract. This populates details of the selection set for the extract process.

Create Extract: Set Parameters



Following are the steps to create an extract:

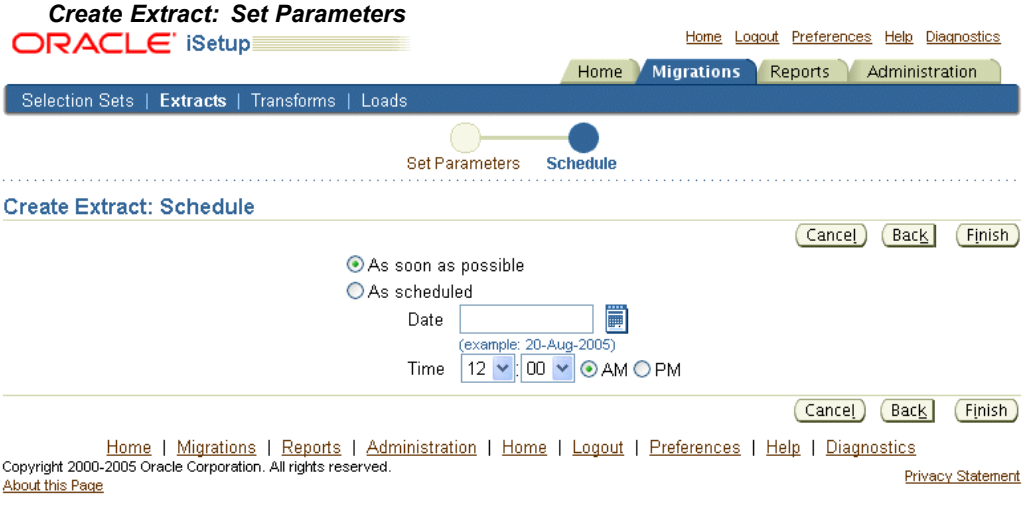
1. **Name:** Enter a unique name for the extract. This is a required field.
2. **Selection Set:** Select the required selection set for extraction. To do this, click the search icon. This is a required field.

   Note: When an extract creation is initiated from within a selection set, the Selection Set information is populated.

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

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

4. **Description:** Provide informative description that could help in identifying the Extract.
5. **Filter:** If the data object is filterable, you can set filters on its attributes.
6. **Schedule:** Create extract as soon as possible or schedule it for a later date and time.



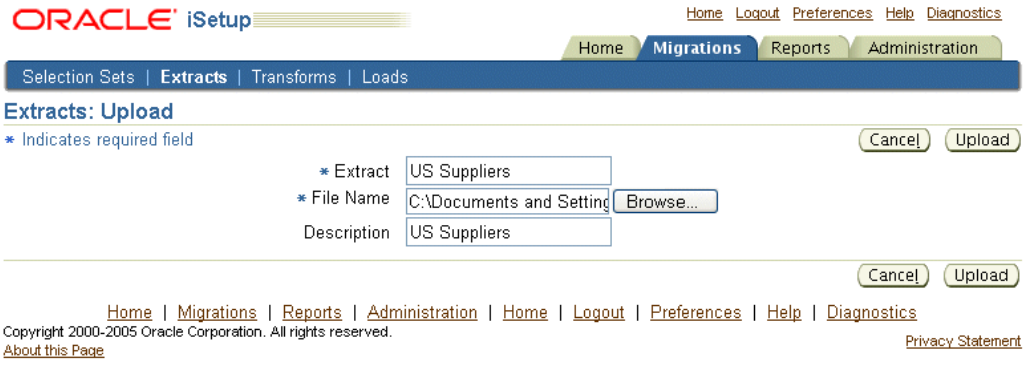
7. **Finish:** Click Finish to submit the extract creation process.

   This takes you to the Extract screen with a confirmation that the extract is in process.

Uploading an Extract

You can upload an extract. The extract could be one that was stored in an external repository or downloaded from another instance. It is recommended that this extract must be an output of the extract process on an instance that was at the same patch set level as the current central instance. Also, the database character set of both instances must match.

Extract: Upload



To upload an Extract:

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

Once the file is uploaded, it appears in the Migrations: Extracts screen and it can be used to transform or to load to the target instance.

Transforming an Extract

You can submit an Extract for transformation. For more information, see Transforms, page 5-10.

Loading an Extract

You can load an Extract to a target instance. For more information, see Loads, page 5-17.

Reporting from an Extract

You can generate a report on an extract. For more information, see Reports, page 6-1.

Deleting an Extract

You can delete an extract using the delete icon of the Extract record.

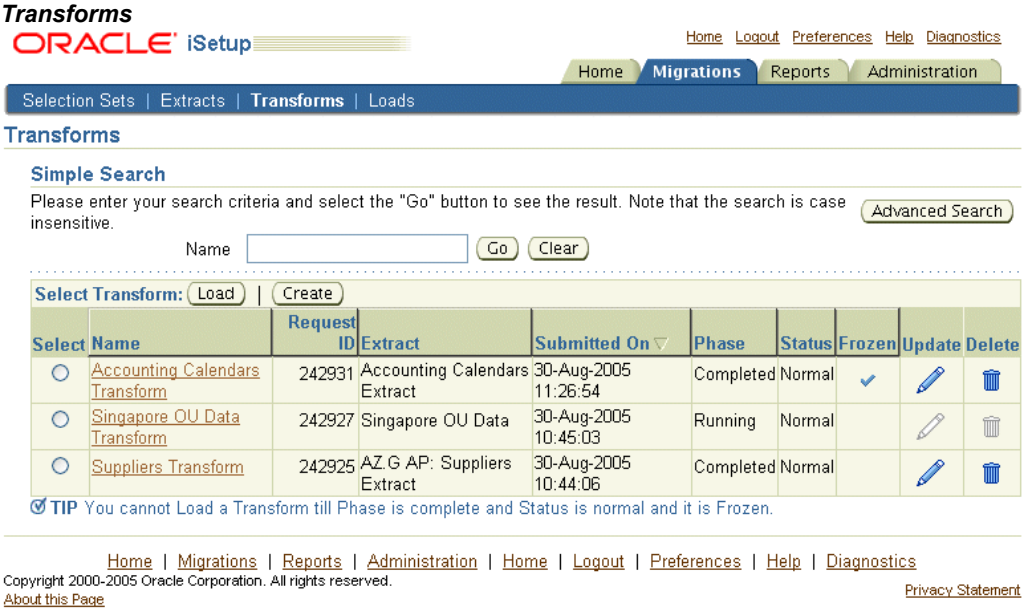
> **Note:** Loads and Transforms are dependant on respective Extract records. Deleting an Extract would result in failure in:
>
> - Restarting a Load dependant on that Extract.
> - Freezing the Transform dependant on that Extract.

Transforms

You can transform certain attributes of the data objects, that are within the Extract, to suite your business requirements.

> **Note:** All data objects do not support transforms.

Transforms



Transforming data is a three step process.

1. **Create:** Submit the Extract for transformation.
2. **Update:** Modify the attributes of the data objects.
3. **Freeze:** Freeze Transform to enable loading it to an instance. By freezing a Transform, you ensure that you do not change the transform during migration.

   Important: You must freeze a transform before it is loaded. Loading of a Transform can only be done once it is in Complete phase with the status as Normal.

Prerequisites

You have an extract with a Phase as Completed and Status as Normal.

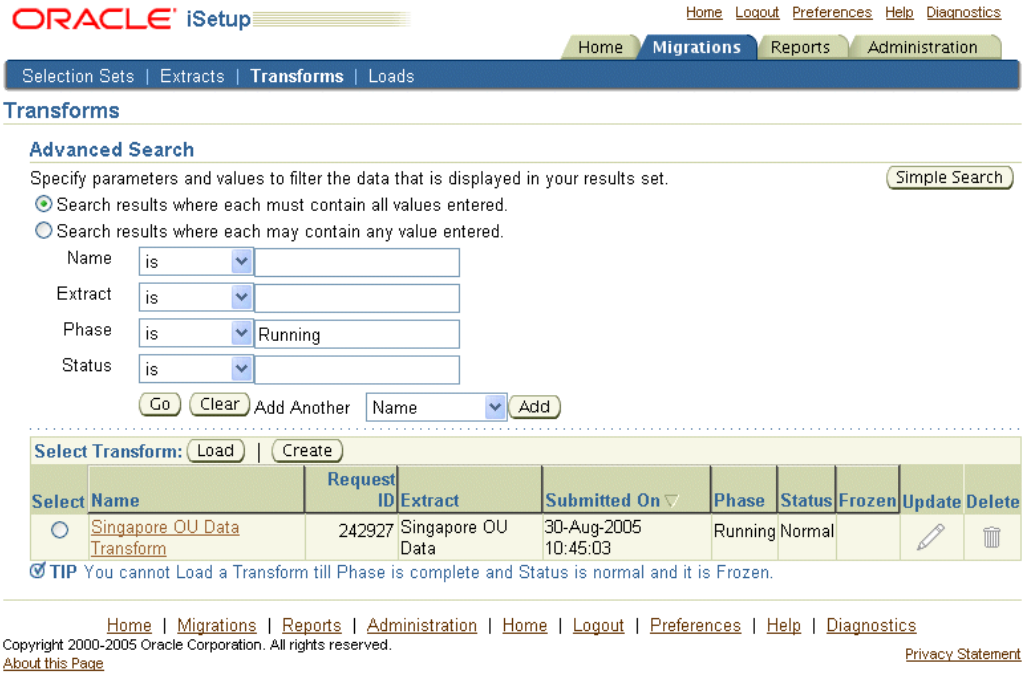
Search for a Transform

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

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

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

Advanced Search on Transforms



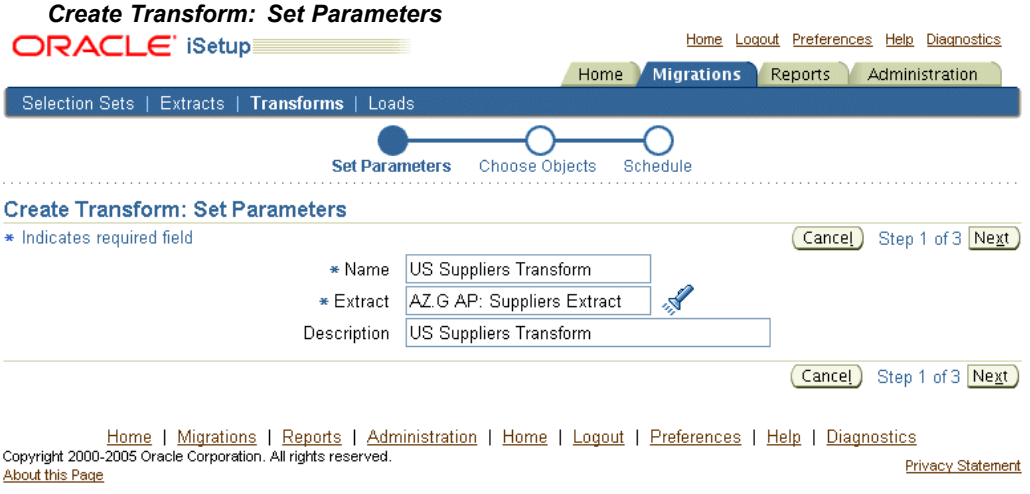
Creating, Updating, and Freezing a Transform

Click on Create in the Migrations: Transforms screen to create a Transform. You can also initiate this process from the Extracts screen by selecting an extract and clicking Transform or by clicking Transform on the Extracts>Details screen.

Following are the steps to Create, Update and Freeze a Transform:

1. **Creating a Transform**

Create Transform: Set Parameters



Following are the steps to create a Transform:

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

2. **Extract:** Select the required Extract. To do this, click the search icon. This is a required field.

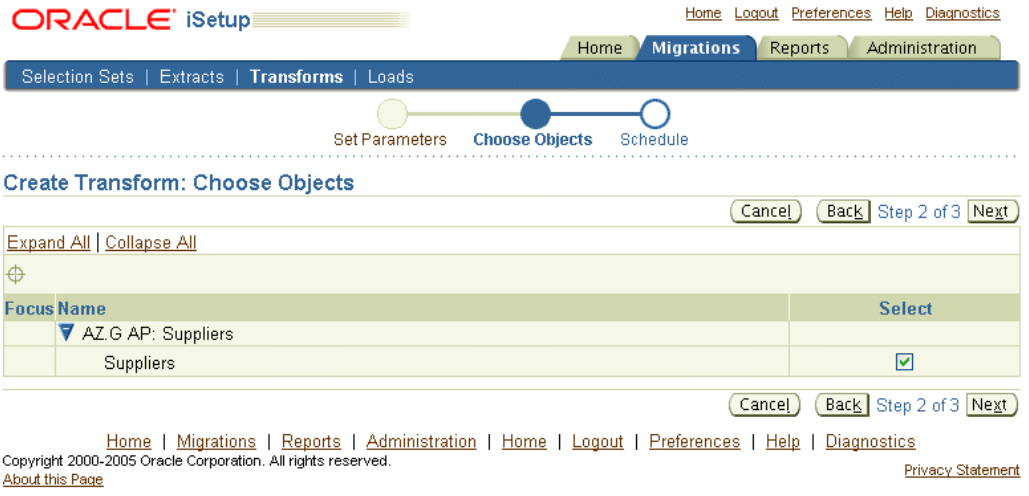
   If this process is initiated from an Migrations: Extract screen, details of the extract are populated.

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

4. Click Next. This takes you to the Create Transform: Choose Objects screen.

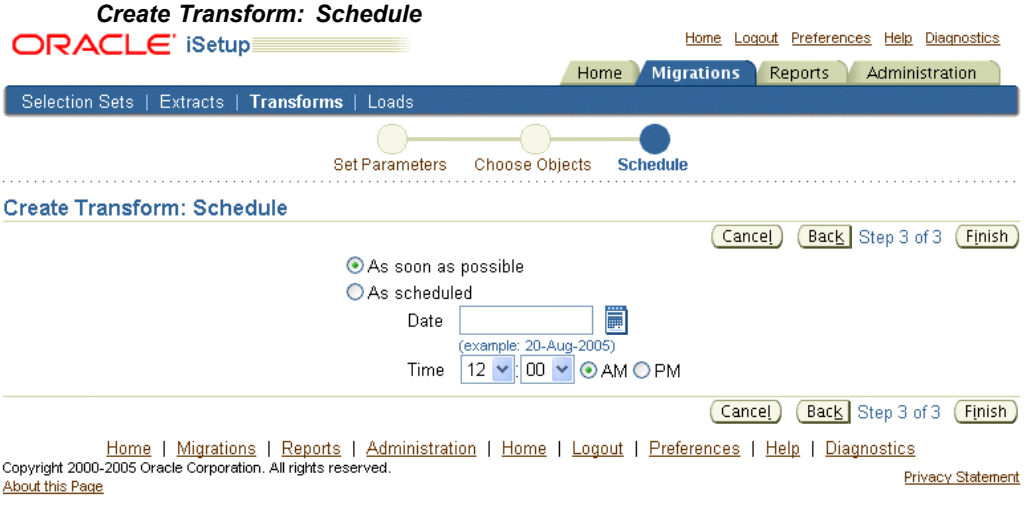
5. **Choose Objects:** Select the objects on which you want to perform transformation.

Create Transform: Choose Objects



6. **Schedule:** Schedule the Transform for a later date and time.

Create Transform: Schedule



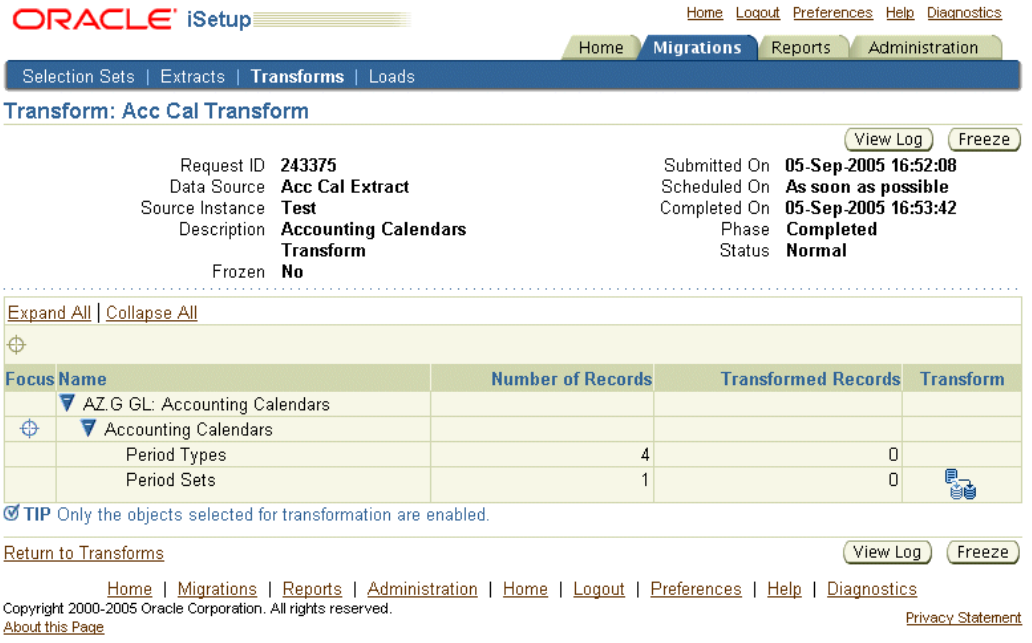
2. Updating a Transform

Once the Status of the transform is Complete and the Phase is Normal, the Update icon is enabled. Now, you can update the data within the Extract.

Following are the steps to Update the Transform:

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

Update a Transform

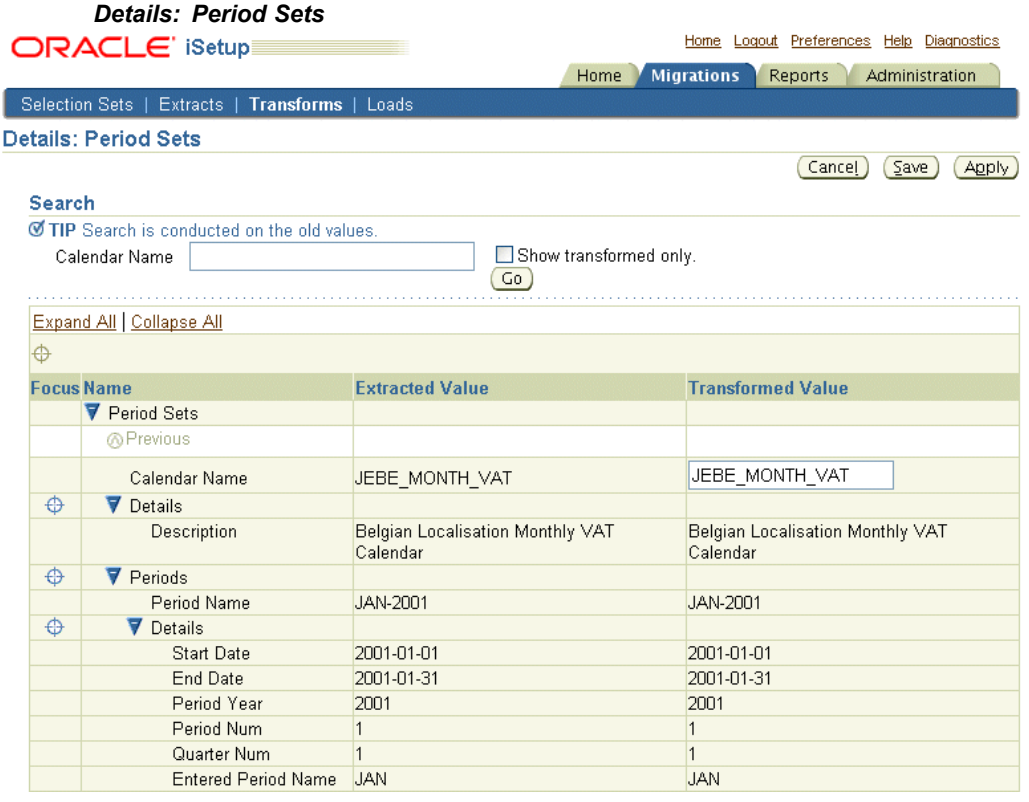


> **Note:** If the transform is frozen, you must unfreeze the transform to apply any changes. Also, you cannot unfreeze the transform if a load is in process with this Transform.

2. Click on the Transform icon of the data object that you want to transform. Only data objects marked for transform, during Create, are enabled. This takes you to a detail screen where you can search for the record to be transformed by using some attributes of the data object.

   Existing values of the attributes for that record appear.

Details: Period Sets

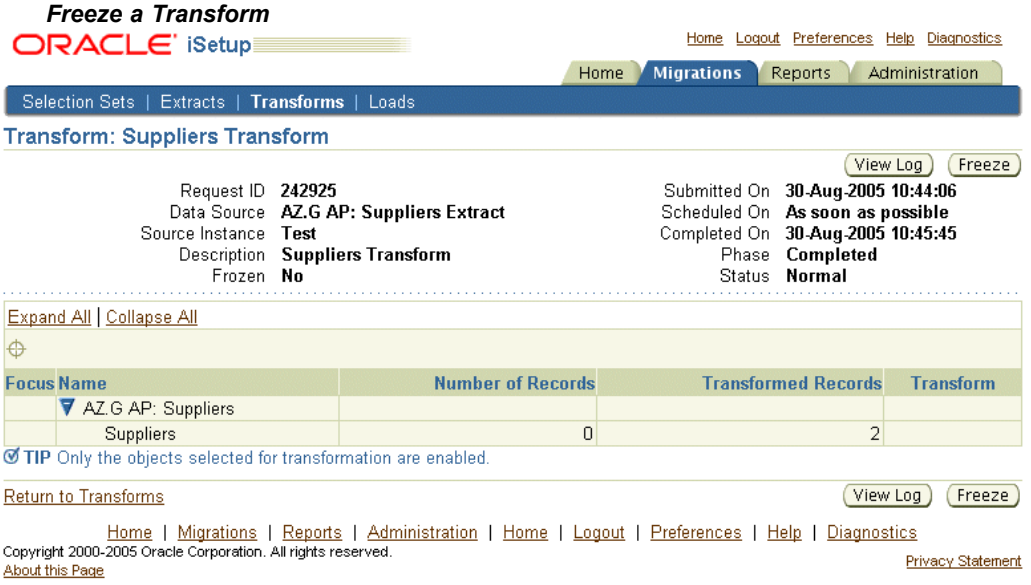


3. Enter the new values for attributes that allow transformation, against the existing values.
4. Save the changed data by clicking Apply.
5. You can save the transform by clicking Save and continue to transform other records. On Apply, the details screen displays the transformed data objects and the number of records that have been transformed in them.

3. **Freezing a Transform**

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

Freeze a Transform



Following are the steps to freeze a transform:

1. Click on Update icon of the Transform. This takes you to the Update screen of the transform.
2. Click Freeze.

Note:

- You can also unfreeze a frozen Transform from the Update screen. If a Transform is unfreezed and changes are made to it, you cannot restart the dependant Load that was submitted before the Transform was unfreezed.
- Only a transfer with status as complete and normal can be loaded.

Viewing a Transform

To view transformed records, click on the name of the transform in the Migrations: Transforms screen. This takes you to a view page.

Click on the view icon to see the transformed records.

Loading a Transform

You can load a Transform from either the Migrations>Transforms screen or the Transforms details screen of a particular transform.

Note: Only a Frozen transform can be loaded.

Deleting a Transform

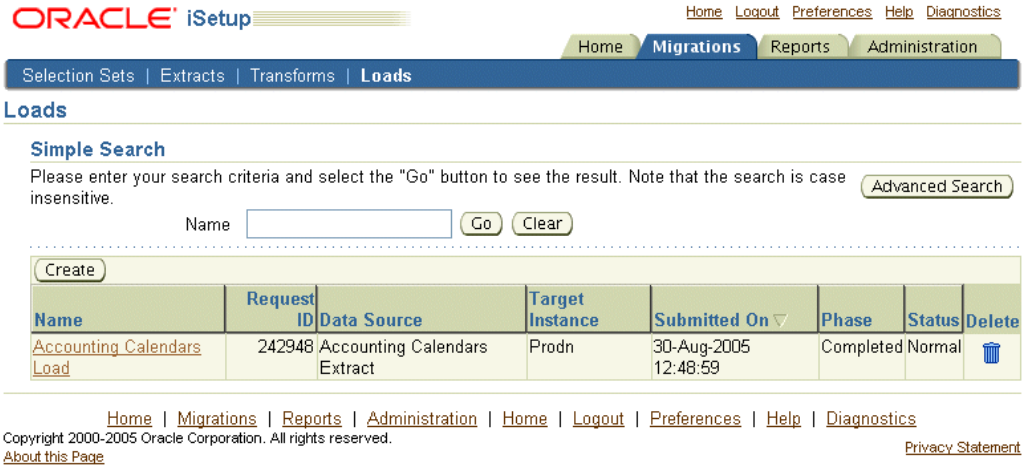
Click on the delete icon in the Transforms screen to delete a transform. This takes you to the Warning page where you must confirm the delete. Once you confirm the deletion, you return to the Transforms screen.

Note: If there are any dependant loads that are incomplete, you cannot restart them if you delete the transform.

Loads

You can load an Extract or a frozen Transform to the target instance.

Loads



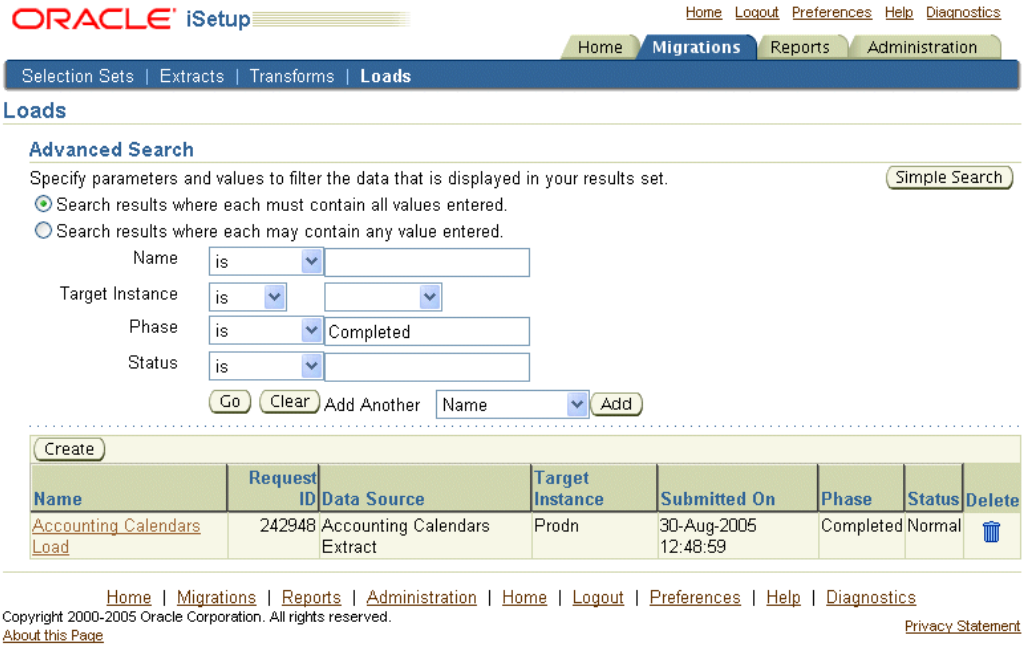
Search for a Load

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

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

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

Advanced Search for Loads

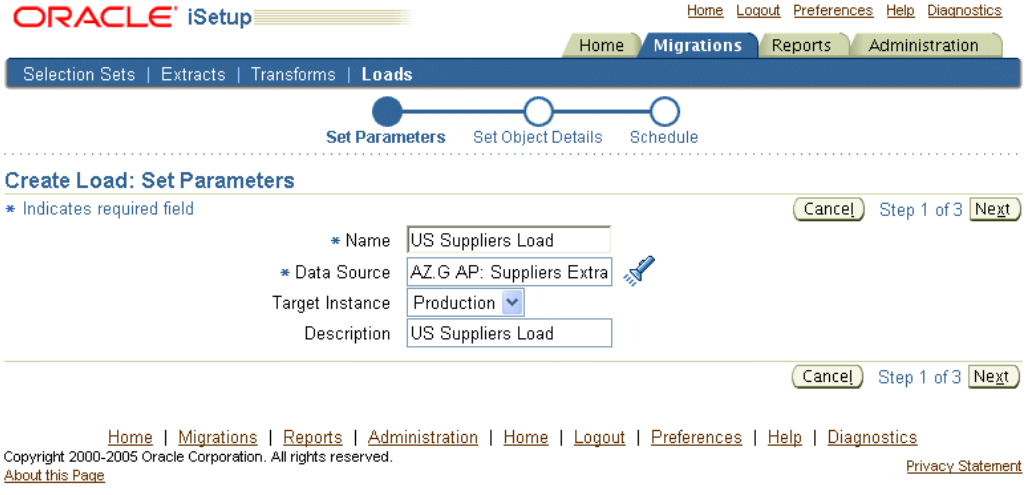


Creating a Load

Click on Create in the **Migrations: Loads** screen to create a load. You can also initiate this process by:

- Clicking Load from the Migrations > Extracts or the Migrations > Extracts Details page.
- Clicking Load from the Migrations > Loads or the Migrations > Loads Details page.

Create Load: Set Parameters



Following are the steps to create a Load:

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

2. **Data Source:** Select a data source (an Extract or Transform). To do this, click the search icon. This is a required field.

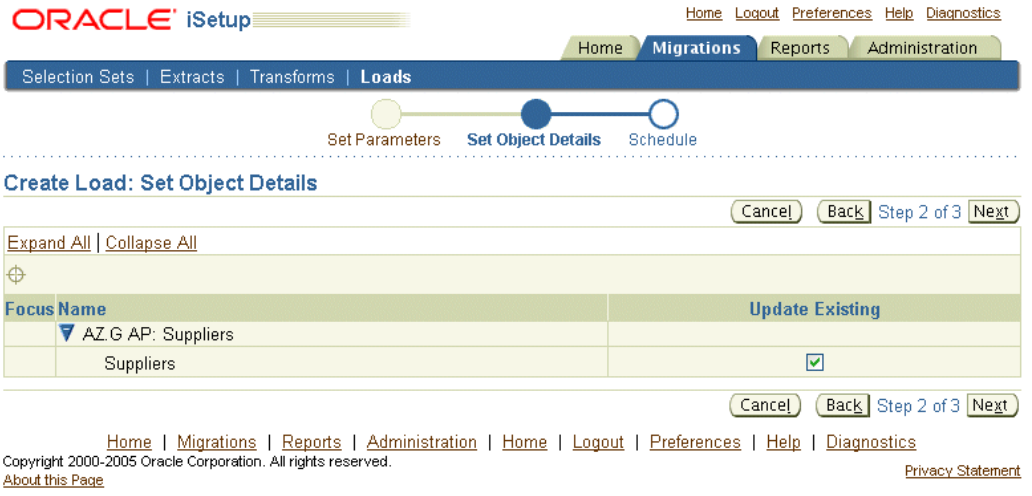
   When Create is initiated from the details screen of the Extract, Transform, Migrations: Extract, or Migrations: Transform, this information is populated automatically.

3. **Target Instance:** Select the Target Instance from the pick list.

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

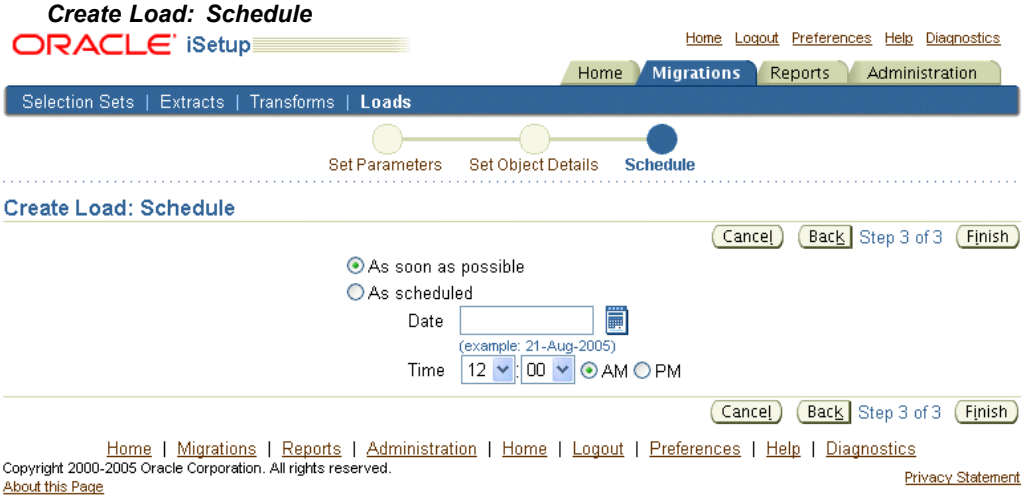
5. **Update Existing:** Select the data objects that you want to overwrite during Load. By default, this is checked for objects that support update.

Create Load: Set Object Details



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

Create Load: Schedule



Note:

- The load is only allowed on extracts that are in Completed phase with the status as Normal.

- A Transform has to be frozen and should be in Completed phase with the status as Normal to initiate a load process.
- Some of the data objects must be updated during load and the update flag would be checked for these data objects by default.
- Some data objects do not support updates.

Restarting a Load

If a load process results in an error, you can restart the load process once the current process ends.

Following are the steps to restart a load:

1. Click on the Load, which resulted in an error, to be restarted in the Migrations: Loads screen.

   This takes you to the details screen of the load.

2. Click Restart.

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

   Here you have two options:

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

3. Click Continue.

   This takes you to the Schedule screen where you can schedule the Load.

Deleting a Load

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

6

Reports

This chapter helps you to generate standard or comparison reports. You can generate new reports or view existing reports.

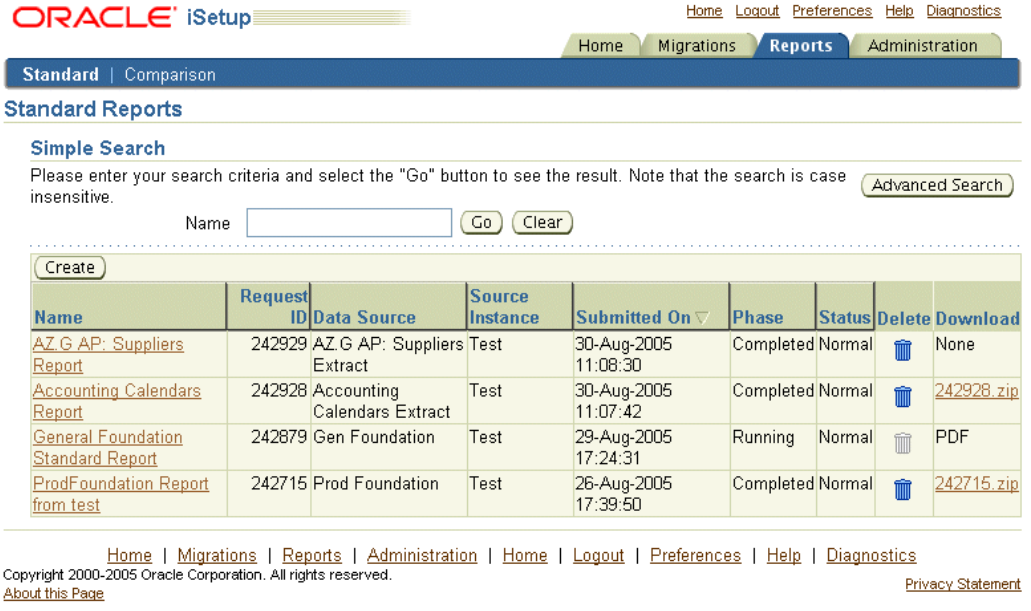
This chapter covers the following topics:

- Standard Reports
- Comparison Reports

Standard Reports

Standard reports are generated from a single Extract.

Standard Reports



Search for a Standard Report

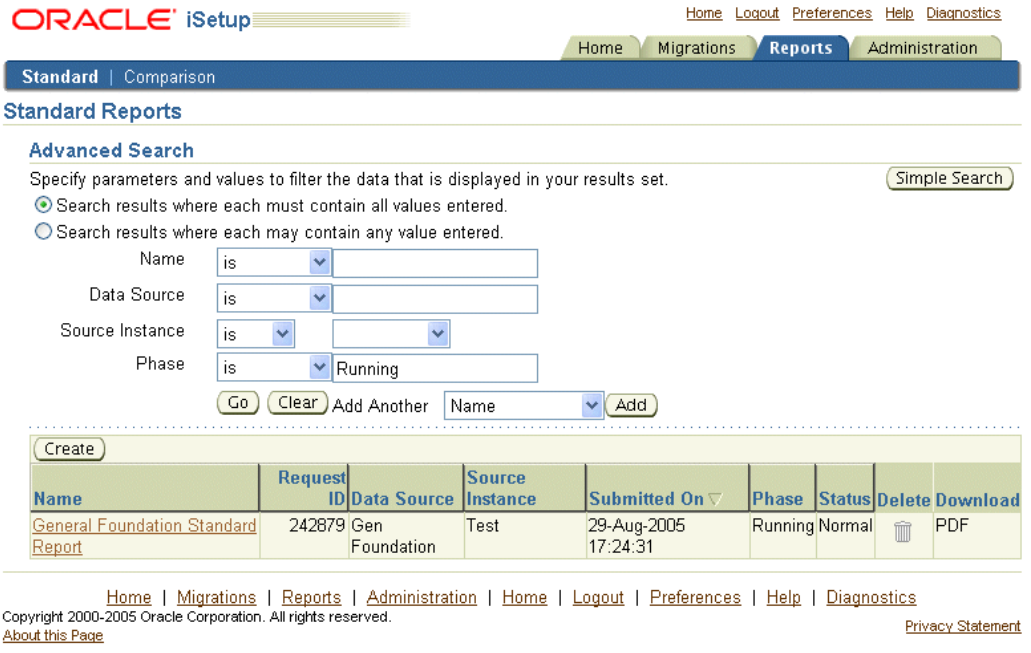
You can either do a Simple Search or an Advanced Search.

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

- Name

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

Advanced Search for Standard Report

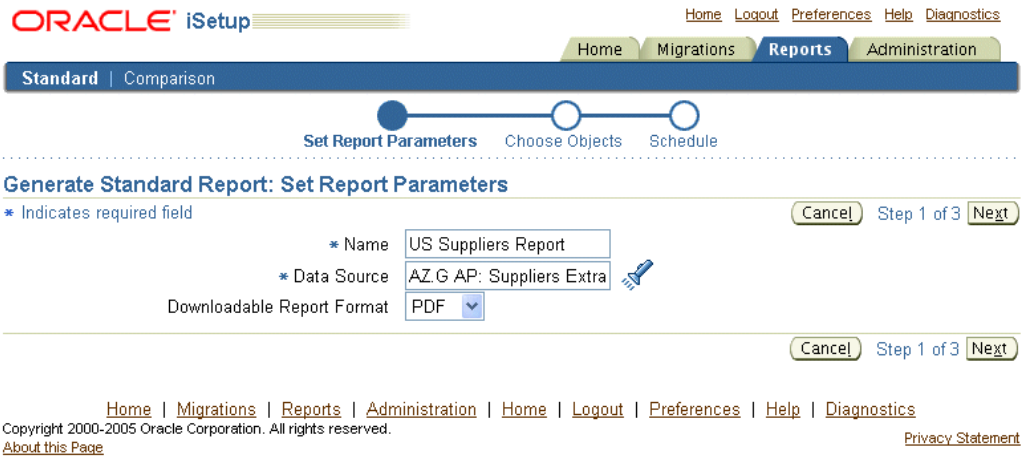


Creating a Standard Report

You can create a Standard report by:

- Clicking Create on the Reports: Standard screen.
- Selecting an Extract on the Migrations: Extracts screen and clicking Report.
- Clicking Report on the Migrations: Extracts: details screen.

Generate Standard Report: Set Report Parameters



Following are the steps to create a Standard Report:

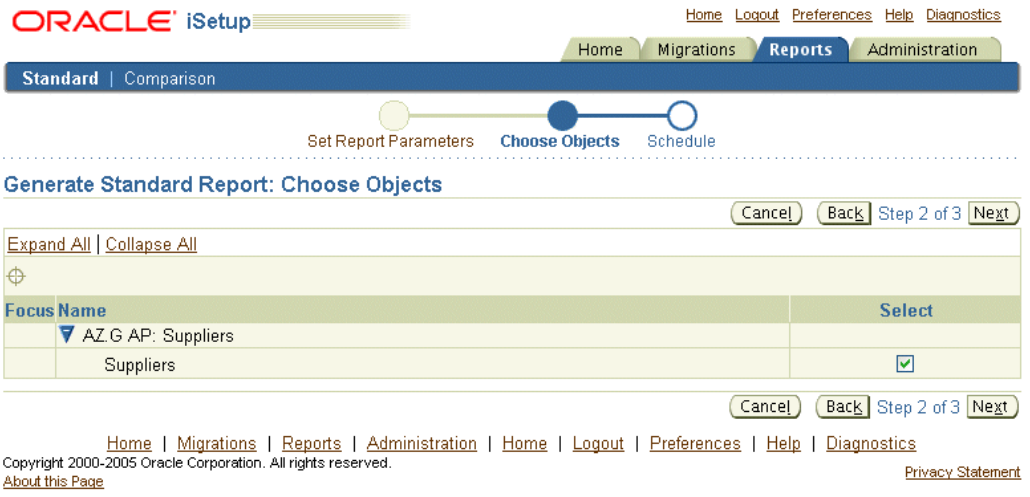
1. **Name:** Enter a unique name for the report. This is a required field.
2. **Data Source:** Select a Data Source for the report. To do this, click the search icon and select the required Extract. This is a required field.

   Note: The extract must have Phase as Completed and Status as Normal. When Create is initiated from the Migrations>Extracts screen or the Migrations>Extract Details screen, this information will be populated.

   - Reporting is only allowed on Extracts that are in Completed phase with the status as Normal.
   - The Data Source is automatically populated in case the process is initiated from the Migrations > Extracts or Migrations > Extracts Details page.

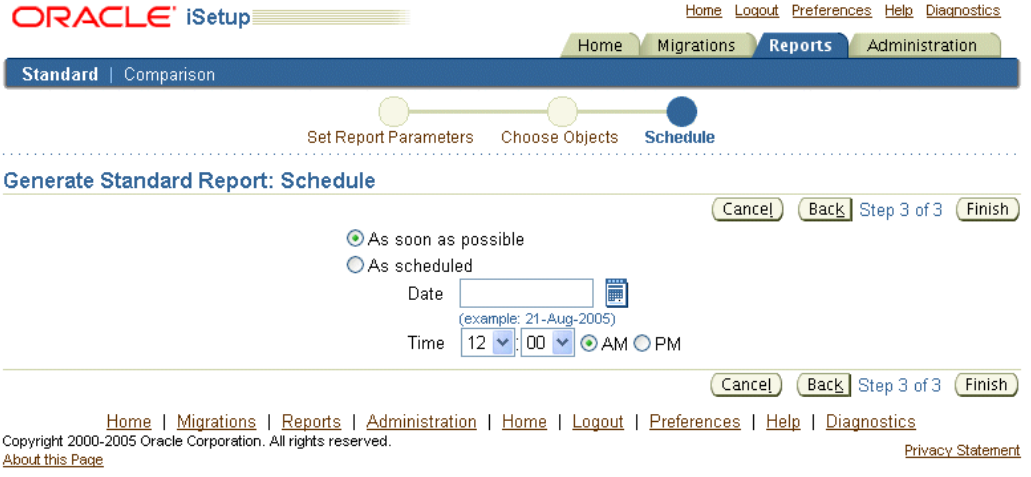
3. **Downloadable Report Format:** To download a report, select the format in which you want the report. You can generate the report as a .PDF, .RTF or as a spreadsheet.
4. Click Next. Based on the snapshot you have selected, you get a list of objects that are a part of the data source. Select the objects that you want to generate the report on. You must select at least one object.

Generate Standard Report: Choose Objects



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

Generate Standard Report: Schedule



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

   This takes you to the Standard Reports screen with a confirmation of creating a standard report.

Viewing a Standard Report

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

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

During such time that the report is being generated, the view icon may be disabled for some of the objects. This view also displays the number of records contained in each data object.

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

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

Further, you can view the list of records that comprise each object and the contents of each record. Click on the View icon of the object for which you want to see the contents. A list of records appears.

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

Click Printable Page for a print version of the Standard Report.

Downloading a Standard Report

If you had specified a download format for the report, a zip file containing the report is available on the Reports: Standard screen. Click the Download link for the required report.

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

The downloaded zip file contains the following files and folders:

- **File: index.html** - This file contains details of the request such as the report name, date of submission, data source name. It also contains details of the hierarchy of objects in the selection set with the number of records for that data object. The View Detail icon takes you to the report for the data object.
- **Folder: Publishedfiles** - This folder contains the different object reports.
- **Folder: index_files** - This folder contains images that appear in the index.html file.

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

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

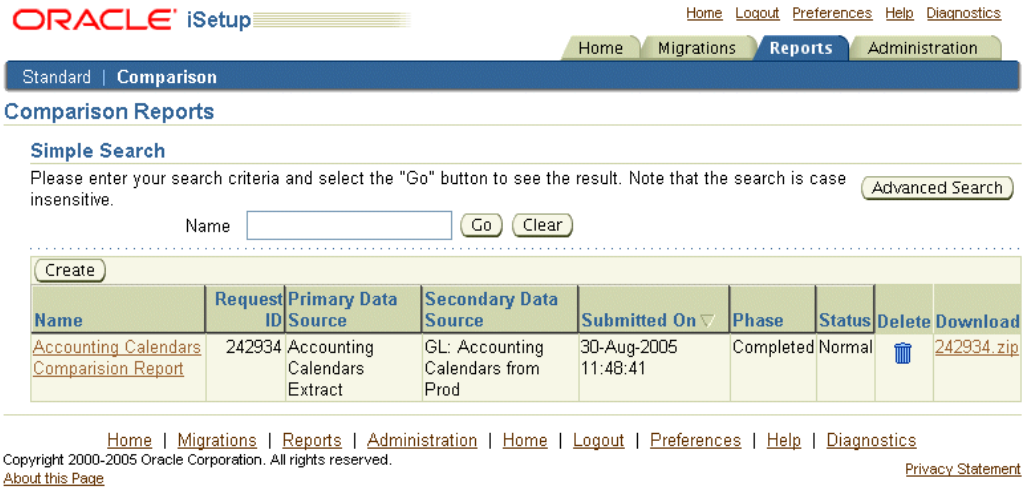
Deleting a Standard Report

Click on the delete icon in the Standard Reports screen to delete a report. This takes you to the Warning page where you must confirm the delete. Once you confirm the deletion, you return to the Standard Reports screen.

Comparison Reports

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

Comparison Reports



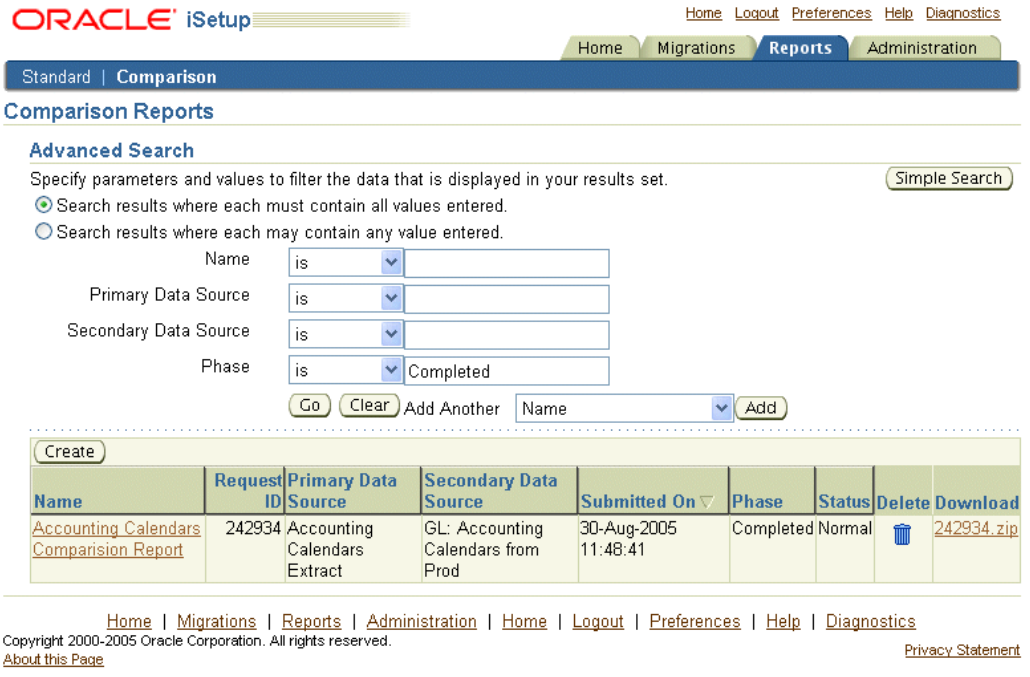
Search for a Comparison Report

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

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

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

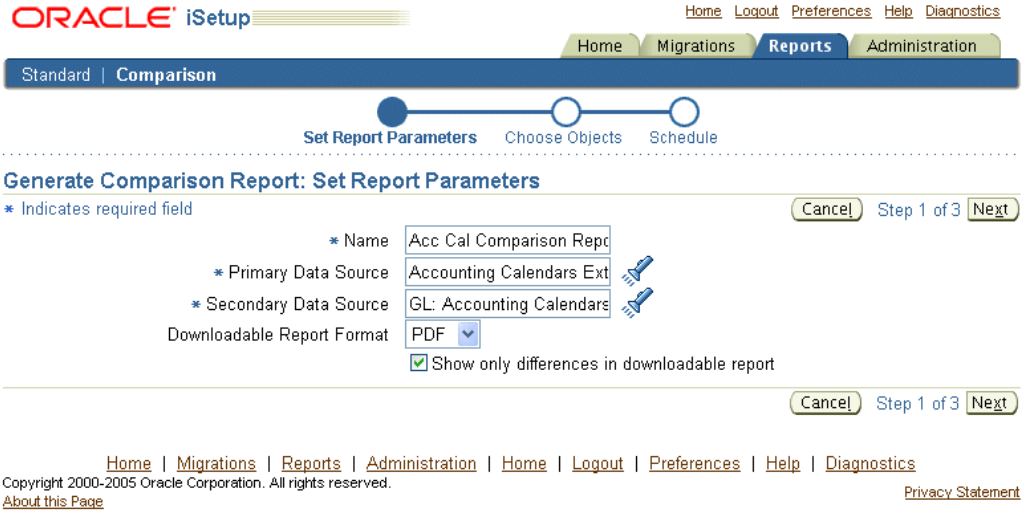
Advanced Search for Comparison Reports



Creating a Comparison Report

Click Create in the Reports: Comparison screen.

Generate Comparison Report: Set Report Parameters



Following are the steps to create a Comparison Report:

1. **Name:** Enter a unique name for the Comparison report. This is a required field.
2. **Primary Data Source:** Select a Primary Data Source.
3. **Secondary Data Source:** Select a Secondary Data Source.

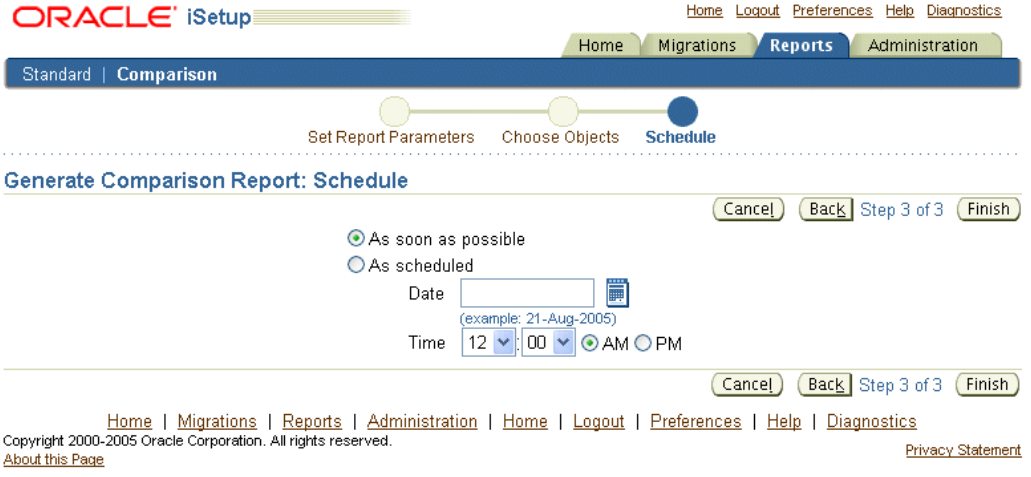
4. **Downloadable Report Format:** To download a report, select the format in which you want the report. You can generate the report as a .PDF, or .RTF.
5. Click the check box "Show only differences in downloadable report" if you want only the differences to be reflected in the downloadable report.
6. Click Next. Based on the snapshots you have selected, the common objects of the two snapshots are listed. Select the objects that you want to generate the report on.

Generate Comparison Report: Choose Objects

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

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

Generate Comparison Report: Schedule



Viewing a Comparison Report

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

This displays the objects that form the report and the number of records that are different for each of the data objects.

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

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

To view records or differences, click on the View icon. To display records with differences only, check the Show only differences check box.

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

Legends

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

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

Click Printable Page for a print version of the Comparison Report.

Downloading a Comparison Report

If you had specified a downloadable format for the report, a .zip file containing the report is available on the Reports>Comparison screen. Click the Download link for the required report. You can also initiate the download from the Comparison Report details screen.

Note:

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

The downloaded zip file contains the following files and folders:

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

- Folder: index_files - This folder contains images that appear in the index.html file.

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

Deleting a Comparison Report

Click on the delete icon in the Comparison Reports screen to delete a report. This takes you to the Warning page where you must confirm the delete. Once you confirm the deletion, you return to the Comparison Reports screen.

A

Selection Set Templates

Oracle iSetup provides you with a set of Selection Set templates. This chapter provides information on these selection sets.

This appendix covers the following topics:

- Generic Selection Sets
- Operational Data Selection Sets
- Independent Selection Sets

Generic Selection Sets

These selection sets are recommended for use when the entire module set up needs to be migrated.

1. **General Foundation**

   This selection set is the base foundation for all other selection sets and helps in the migration of the AOL foundation setups.

   Prerequisites: None

   Following is a list of data objects and their parameters of the General Foundation selection set.

General Foundation Selection Set

Data Object	Filterable	Transformable	Updateable
General Foundation			
Lookups	N	N	Y
Printers	N	N	Y
Request Groups	N	N	Y
Menus	N	N	Y
Responsibilities	N	N	Y
Users	N	N	Y
Key Flexfields	N	N	Y
Descriptive Flexfields	N	N	Y
Compile All Flexfields	N	N	Y
Value Set Values	N	N	Y
Document Sequences	N	N	Y
Document Sequence Categories	N	N	Y

2. **Product Foundation**

   This selection set should be used to migrate the Product Foundation data covering:

   - Financials Foundation
   - HRMS Foundation
   - Manufacturing foundation
   - General Foundation (Profile Options)

   This selection set should be used to migrate data prior to using any of the other selection sets, as all other setups are dependant on data migrated by this selection set.

   Prerequisites: General Foundation

   Following is a list of data objects and their parameters of the Product Foundation selection set.

Product Foundation Selection Set

Data Object	Filterable	Transformable	Updateable
Financial Foundation			
Chart of Accounts	N	N	Y
Accounting Calendars	N	N	Y
Currencies	N	N	Y
Set of Books	N	N	Y
HRMS Foundation			
Locations	N	N	Y
Business Groups	N	N	Y
Enable Multiple Security Groups	N	N	Y
Legal Entities	N	N	Y
Operating Units	N	N	Y
Convert to Multi-Org Concurrent Program	N	N	Y
Organizations	N	N	Y
Manufacturing Foundation			
Unit of Measure, Conversions, and Classes	N	N	N
Carriers, Methods, Carrier-ModeServ, Carrier-Org	N	N	N
General Foundation			
Profile Options	N	N	Y

3. **Financials**

This selection set helps migrate the Financial setup data. It covers the following modules:

- General Ledger
- Accounts Payables
- Accounts Receivables
- Fixed Assets
- Cash Management
- Oracle Credit Management
- Public Sector Financials

Prerequisites:

- General Foundation

- Product Foundation

Following is a list of data objects and their parameters of the Financials selection set.

Financials Selection Set

Data Object	Filterable	Transformable	Updateable
General Ledger			
Code Combination	N	N	Y
Journal Reversal Criteria	N	N	Y
Conversion Rate Types	N	N	Y
Period Rates	N	N	Y
Summary Templates	N	N	Y
Encumbrance Types	N	N	Y
Budgets	N	N	Y
Budget Organizations	N	N	Y
Statistical Units of Measure	N	N	Y
Accounts Payable			
Financials Options	N	N	Y
Payables Options	N	N	Y
Payment Formats	N	N	Y
Payables Payment Terms	N	N	Y
Special Calendars	N	N	Y
Aging Periods	N	N	Y
Distribution Sets	N	N	Y
Invoice Tolerances	N	N	Y
Invoice Approvals	N	N	Y
Payables Tax Codes	N	N	Y
Withholding Tax	N	N	Y
Tax Authority Suppliers	N	N	Y
Reporting Entities	N	N	Y
Expense Templates	N	N	Y
Banks and Bank Accounts	N	N	Y
Accounts Receivable			
Receivables System Options	N	N	Y

Data Object	Filterable	Transformable	Updateable
Receivables Payment Terms	N	N	N
Receivables Transaction Types	N	N	Y
Transaction Sources	N	N	Y
Memo Lines	N	N	Y
Auto Accounting	N	N	Y
Approval User Limits	N	N	Y
Receivables Territories	N	N	Y
Receivables Activities	N	N	Y
Invoice Grouping Rules	N	N	Y
Invoicing Rules	N	N	Y
Line Ordering Rules	N	N	Y
Auto Cash Rule Sets	N	N	Y
Receipt Sources	N	N	Y
Receipt Classes and Methods	N	N	Y
Collectors	N	N	Y
Customer Profile Classes	N	N	Y
Remit To Addresses	N	N	Y
Statement Cycles	N	N	Y
Receivables Tax Codes and Rates	N	N	Y
Tax Exemptions	N	N	Y
Aging Buckets	N	N	Y
Fixed Assets			
Asset System Controls	N	N	Y
Asset Quick Codes	N	N	Y
Asset Locations	N	N	Y
Asset Keywords	N	N	Y
Asset Depreciation Calendars	N	N	Y
Fiscal Years	N	N	Y
Asset Prorate Conventions	N	N	Y
Asset Book Controls	N	N	Y
Asset Categories	N	N	Y

Data Object	Filterable	Transformable	Updateable
Cash Management			
Cash Management System Parameters	N	N	Y
Transaction Codes	N	N	Y
Oracle Credit Management			
Credit Management Setup Options	N	Y	Y
Credit Management Scores	N	Y	N
Credit Management Check Lists	N	Y	Y
Credit Management Auto Rules	N	Y	N
Public Sector Financials			
Budgetary Control Groups	N	N	Y
Transaction Codes	N	N	Y

4. **Discrete Manufacturing and Distribution Setups**

   This selection set helps to migrate the Discrete Manufacturing setup data.

   Prerequisites:

   - General Foundation
   - Product Foundation
   - Financials
   - HRMS - Employees

   Following is a list of data objects and their parameters of the Discrete Manufacturing and Distribution Setups selection set.

Discrete Manufacturing and Distribution Setups Selection Set

Data Objects	Filterable	Transformable	Updateable
Foundation			
Profile Options	N	N	Y
Inventory			
Inventory FlexFields	N	N	N
Default Category Sets	N	N	N
Inventory Organizations	N	N	Y
HR Locations Update	N	N	Y
Inventory Parameters	N	N	N

Data Objects	Filterable	Transformable	Updateable
Inventory Parameters Update	N	N	Y
Shortage Parameters	N	N	N
Transaction Reasons	N	N	N
Item Locators	N	N	N
Subinventories	N	N	N
Stock Locators	N	N	N
Unit of Measure, Conversions, and Classes	N	N	N
Item Categories	N	N	N
Category Sets	N	N	Y
Item Valid Categories	N	N	N
Item Attribute Controls	N	N	Y
Item Status Codes	N	N	N
Catalog Groups	N	N	N
Item Templates	N	N	N
Planners	N	N	N
Picking Rules	N	N	N
Serial Numbers	N	N	N
Material Statuses	N	N	N
Item Cross References	N	N	N
ABC Compliles	N	N	N
ABC Classes	N	N	N
ABC Assignment Groups and Item Assignments	N	N	N
Cycle Countings	N	N	N
Cycle Count Classes	N	N	N
Cycle Count Items	N	N	N
Physical Inventories	N	N	N
Economic Zones	N	N	N
Movement Statistics Parameters	N	N	N
Movement Statistics Validation Rules	N	N	N
Inter-Location Transit Time	N	N	N

Data Objects	Filterable	Transformable	Updateable
Shipping Networks	N	N	N
Inter-Company Relationships	N	N	N
Genealogy	N	N	N
Organization Access	N	N	N
Bill Of Material			
Exception Templates	N	N	N
BOM Calendars & Calendar Exception Templates	N	N	N
Bill of Material Parameters	N	N	N
Department Classes	N	N	N
Departments	N	N	N
Simulation Sets	N	N	N
Resources	N	N	N
Employee Resources	N	N	N
Equipment Resources	N	N	N
Department Resources	N	N	N
Items	N	N	N
Standard Operations	N	N	N
Routings	N	N	N
Alternate Designators	N	N	N
Bill Of Materials	N	N	N
Engineering			
ECO Autonumbering	N	N	N
Change Order Priorities	N	N	N
Change Order Types	N	N	N
Change Type Processes	N	N	N
Change Order Reasons	N	N	N
Advanced Planning Systems			
Planning Parameters	N	N	N
Sourcing Rules	N	N	N
Assignment Sets	N	N	N
Application Instances	N	N	N

Data Objects	Filterable	Transformable	Updateable
APS Organizations	N	N	N
Organization Security Rules	N	N	N
MSD Dimensions	N	N	N
MSD Hierarchies	N	N	N
MSD Hierarchy Levels	N	N	N
MSD Levels	N	N	N
ATP Rules	N	N	N
Work in Process			
WIP Parameters	N	N	N
WIP Accounting Classes	N	N	N
Shop Floor Statuses	N	N	N
WIP Parameters Update	N	N	Y
Production Lines	N	N	N
Schedule Groups	N	N	N
Labor Rates	N	N	N
Tolerance Fences	N	N	N
Costing			
Cost Groups	N	N	N
Cost Group Accounts	N	N	N
Activities and Activity Costs	N	N	N
Expenditure Types for Cost Elements	N	N	N
Cost Sub Elements	N	N	N
Cost Subelements Defaults	N	N	N
Cost Types	N	N	N
Item Costs	N	N	N
Purchasing			
Purchasing Options	N	N	N
Receiving Options	N	N	N
Buyers	N	N	N
Approval Groups, Group Assignments and Rules	N	N	N

Data Objects	Filterable	Transformable	Updateable
Approval Assignments	N	N	N
Document Types	N	N	N
Line Types	N	N	N
Requisition Templates	N	N	N
Purchasing Commodity Definitions	N	N	N
Approved Supplier Lists	N	N	N
Job Category Associations	N	N	N
Quality Inspection Codes	N	N	N
Purchasing Unique Identifiers	N	N	N
Blanket Purchase Orders	N	N	N
Order Management			
Credit Check Rules	N	N	N
Credit Profiles	N	N	N
Credit Usage Rule Set	N	N	N
Credit Usage Rule Set Assignment	N	N	N
Holds	N	N	N
Order Import Sources	N	N	N
Transaction Types	N	N	N
Transaction Types Update	N	N	Y
Order Parameters	N	N	N
Shipping			
Release Sequence Rules	N	N	N
Release Rules	N	N	N
Pick Slip Grouping Rules	N	N	N
Shipping Document Sets	N	N	N
Freight Cost Types	N	N	N
Carriers, Methods, Carrier-ModeServ, Carrier-Org	N	N	N
Shipping Parameters	N	N	N
Global Shipping Parameters	N	N	Y
Printers	N	N	N
Shipping Execution Role Definition	N	N	N

Data Objects	Filterable	Transformable	Updateable
Shipping Execution Grants	N	N	N
Pricing			
Price Lists	N	N	N
Simple Price Modifiers	N	N	N
Price Formulas	N	N	N
Quality			
Collection Elements	N	N	N
Collection Plans	N	N	N
Specifications	N	N	N
Warehouse Management			
WMS Rules	N	N	N
WMS Rules Workbench	N	N	N
WMS Staging Lane Relationships	N	N	N
WMS Strategies	N	N	N
Enterprise Asset Management			
EAM Parameters	N	N	N
Areas	N	N	N
Attribute Assignments	N	N	N
Item Activity Association	N	N	N

5. **Human Resources: Organization Structure**

   This selection set is used to migrate the Organization Structure data and certain HR setup data related to the structure.

   Prerequisites:

   - General Foundation
   - Product Foundation

   Following is a list of data objects and their parameters of the Human Resources: Organization Structure selection set.

Human Resources: Organization Structure Selection Set

Data Object	Filterable	Transformable	Updateable
HR Organization Structure Setups			
Locations	Y	N	Y
Business Groups	Y	N	Y
Legal Entities	Y	N	Y
Operating Units	Y	N	Y
Organizations	Y	N	Y
Organization Structure Versions	Y	N	Y
Organization Structures	Y	N	Y
Organization Structure Elements (Hierarchies)	Y	N	Y
Job Groups	Y	N	Y
Jobs	Y	N	Y
Grades	Y	N	Y
Position Structures	Y	N	Y
Position Structure Elements (Hierarchies)	Y	N	Y
Position Structure Versions	Y	N	Y
Positions	Y	N	Y
Payrolls	Y	N	N

Operational Data Selection Sets

These selection sets help migrate operational data. These selection sets can also be used for rollouts or incremental set ups.

1. **Accounts Payable: Suppliers**

   This selection set is used to migrate Supplier data. It helps migrate supplier details along with their site information.

   Prerequisites:

   - General Foundation
   - Product Foundation
   - Financials

   Following is a list of data objects and their parameters of the Accounts Payable: Suppliers selection set.

Accounts Payable: Suppliers Selection Set

Data Object	Filterable	Transformable	Updateable
Suppliers	Y	Y	Y

2. **Accounts Receivables: Customers**

   This selection set is used to migrate customer data.

   Prerequisites:

   - General Foundation
   - Product Foundation
   - Financials

   Following is a list of data objects and their parameters of the Accounts Receivables: Customers selection set.

Accounts Receivables: Customers Selection Set

Data Object	Filterable	Transformable	Updateable
Customers	Y	N	N

3. **Accounts Receivables: Tax Codes and Rates**

   This selection set helps migrate tax codes and rates.

   Prerequisites:

   - General Foundation
   - Product Foundation
   - Financials

   Following is a list of data objects and their parameters of the Accounts Receivables: Tax Codes and Rates selection set.

Accounts Receivables: Tax Codes and Rates Selection Set

Data Object	Filterable	Transformable	Updateable
Receivables Tax Codes and Rates	Y	N	Y

4. **Human Resources: Employees**

   This selection set helps migrate employee data.

   Prerequisites:

   - General Foundation
   - Product Foundation
   - Financials
   - Organization Structure

Following is a list of data objects and their parameters of the Human Resources: Employees selection set.

Human Resources: Employees Selection Set

Data Object	Filterable	Transformable	Updateable
Employees	Y	N	N

Independent Selection Sets

These selection sets are recommended for use during rollouts or incremental setups.

1. **General Ledger - Set of Books**

   This selection set helps migrate the Set of Books. It is recommended to use this selection set when a new Set of Books must be migrated and the target instance contains a previous setup with Foundation data.

   Prerequisites:

   - General Foundation
   - Product Foundation

   Following is a list of data objects and their parameters of the General Ledger - Set of Books selection set.

   General Ledger - Set of Books Selection Set

Data Object	Filterable	Transformable	Updateable
Set of Books	Y	N	Y

2. **General Ledger - Chart of Accounts**

   This selection set helps migrate the Chart of Accounts. It is recommended to use this selection set when a new Chart of Accounts must be migrated and the target instance contains a previous setup with Foundation data.

   Prerequisites:

   - General Foundation
   - Product Foundation

   Following is a list of data objects and their parameters of the General Ledger - Chart of Accounts selection set.

   General Ledger - Chart of Accounts Selection Set

Data Object	Filterable	Transformable	Updateable
Chart Of Accounts	Y	N	Y

3. **General Ledger - Calendar**

This selection set helps migrate the GL Calendar setup. It is recommended to use this selection set when a new Calendar data must be migrated and the target instance contains a previous setup with Foundation data.

Prerequisites:

- General Foundation
- Product Foundation

Following is a list of data objects and their parameters of the General Ledger - Calendar selection set.

General Ledger - Calendar Selection Set

Data Object	Filterable	Transformable	Updateable
Accounting Calendars	Y	Y	Y

4. **General Ledger - Currencies**

This selection set helps migrate the Currencies setup. It is recommended to use this selection set when new Currencies data must be migrated and the target instance contains a previous setup with Foundation data.

Prerequisites:

- General Foundation
- Product Foundation

Following is a list of data objects and their parameters of the General Ledger - Currencies selection set.

General Ledger - Currencies Selection Set

Data Object	Filterable	Transformable	Updateable
Currencies	Y	N	Y

5. **General Ledger - Daily Rates**

This selection set helps migrate the Daily Rates data.

Prerequisites:

- General Foundation
- Product Foundation

Following is a list of data objects and their parameters of the General Ledger - Daily Rates selection set.

General Ledger - Daily Rates Selection Set

Data Object	Filterable	Transformable	Updateable
Daily Rates	Y	N	Y

6. **Financials: Financials (OU Level)**

This selection set helps migrate financial data pertaining to a particular Operating Unit.

Prerequisites:

- General Foundation
- Product Foundation

Following is a list of data objects and their parameters of the Financials: Financials (OU Level) selection set.

Financials: Financials (OU Level) Selection Set

Data Object	Filterable	Transformable	Updateable
Financials Operating Unit Level Setups			
Operating Units	Y	N	Y
Reporting Entities	N	N	Y
Financials Options	N	N	Y
Distribution Sets	N	N	Y
Invoice Tolerances	N	N	Y
Payables Options	N	N	Y
Tax Exemptions	N	N	Y
Memo Lines	N	N	Y
Remit To Addresses	N	N	Y
Auto Accounting	N	N	Y
Receipt Classes and Methods	N	N	Y
Receipt Sources	N	N	Y
Receivables Activities	N	N	Y
Receivables System Options	N	N	Y
Receivables Transaction Types	N	N	Y
Receivables Tax Codes and Rates	N	N	Y
Transaction Sources	N	N	Y
Cash Management System Parameters	N	N	Y
Inventory Organizations	N	N	Y
Expense Templates	N	N	Y
All Profile Options	N	N	Y
Payables Tax Codes	N	N	Y

7. **Profile Options**

This selection set helps migrate the Profile Options.

Prerequisites:

- General Foundation
- Product Foundation

Following is a list of data objects and their parameters of the Profile Options selection set.

Profile Options Selection Set

Data Object	Filterable	Transformable	Updateable
Profile Options	N	N	Y

Glossary

Central Instance

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

Data Source

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

Instance Mapping

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

DBC File

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

Extract

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

Filter

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

Instance Name

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

Load

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

Migrator

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

Reporter

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

Responsibility

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

Restart Load

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

Selection Set

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

Selection Set Template

Oracle iSetup provides you with a set of Selection Set Templates. They are the starting point to create a Selection Set.

Setup Object

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

Snapshot

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

Source Instance

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

Target Instance

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

Transform

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

Update Existing (During Load) Flag

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