

 rite software

 convertrite

User Manual



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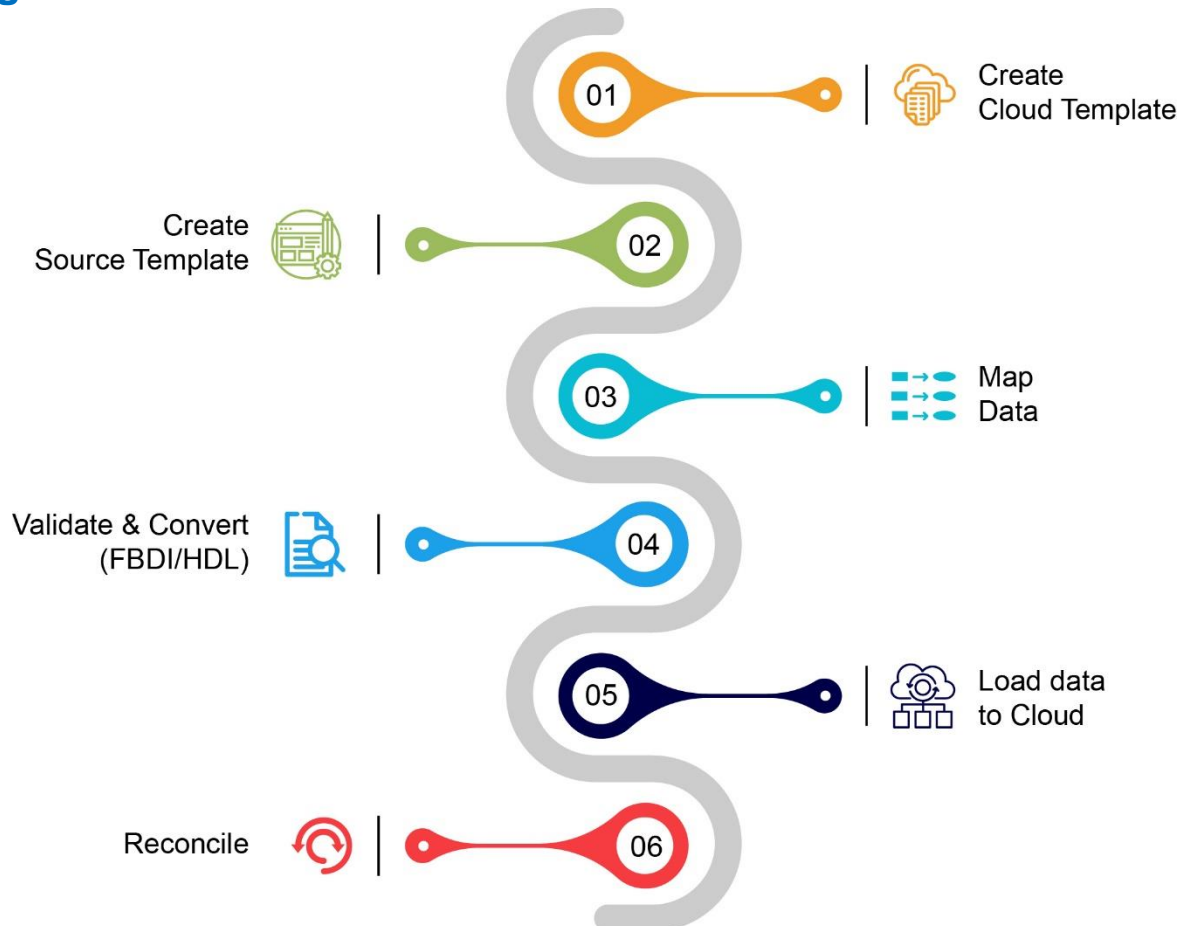
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Introduction

It is a data conversion tool built on Oracle technologies, designed to automate data conversion from any source to Oracle Cloud Applications. With ConvertRite, you can automate manual, time-consuming and error-prone processes (such as data mapping and validation) and convert all your data from legacy applications to make it compatible with Oracle Cloud Applications.

High Level Process Flow



Login Information

Link: <https://convertrite.ritesoftware.com/>

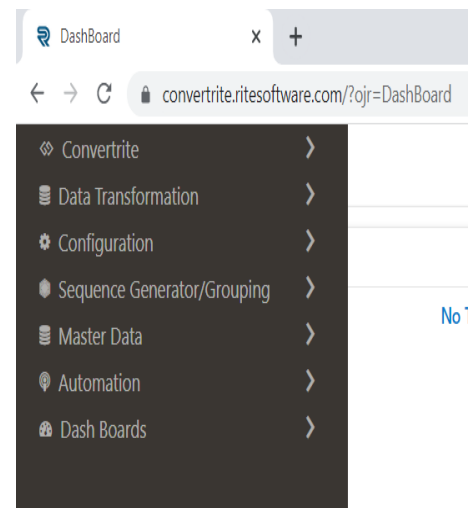
Login: The user should log in and select the role of admin to access ConvertRite.

Workflow

Click on
for application



hamburger menu on top left
navigation.



- Project, POD, Parent object and child object (object code) are Master data.

STEP 1:

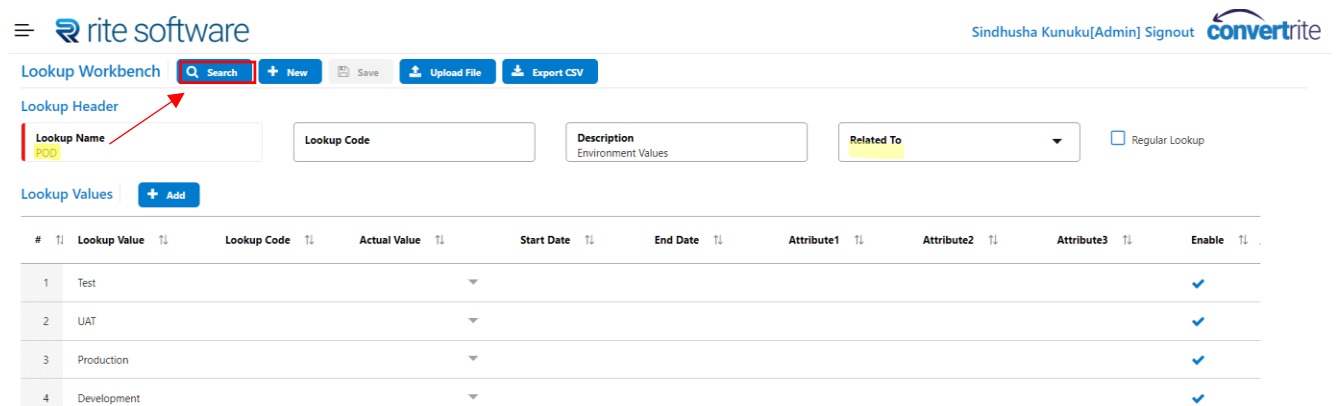
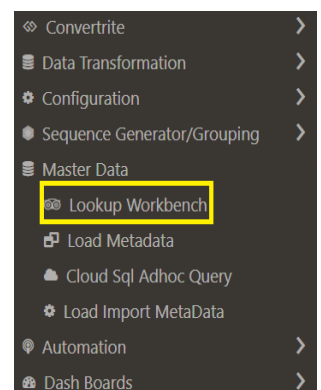
Creation of POD:

POD - The Product Oriented Delivery (POD) model is a software development strategy that centers on building small cross-functional teams that own specific tasks or requirements for a project.

A project can be created in different PODs or many Projects in one POD can be created.

- To create a POD in ConvertRite, click on hamburger button- master data- lookup workbench- search for POD – click on add at lookup values – add POD name. (POD is independent- doesn't rely on any other values) – save.

- Export CSV – Export CSV button downloads all the file based data on this particular screen.



Creation of Project:

- To create the project, in the lookup header – search for the Lookup name as Project and add the Lookup value – your project details.

- Project is related to POD – Hence select the required POD – Save.

Lookup Header

Lookup Name: Project, Lookup Code: , Description: Project Values, Related To: POD, Regular Lookup: ☐

Lookup Values

#	Lookup Value	Lookup Code	Actual Value	Start Date	End Date	Attribute1	Attribute2	Attribute3	Enable
1	Falcon		UAT						✓
2	Pheonix		UAT						✓
3	Lion		UAT						✓
4	Blue		UAT						✓
5	Green		UAT						✓
6	Yellow		UAT						✓
7	Orange		UAT						✓
8	Eagle		UAT			10			✓
9									✓

Creation of Parent Object:

- Click on the hamburger button - Master data - Lookup workbench.
- Click on Search -Search for Parent object- add a lookup value- define lookup name as required parent object from FBDI file (Create parent object) – Assign project name in actual value.

Search Lookup Workbench

Lookup Name: parent object, Operator: Contains

Select Lookup

#	Lookup Name	Description	Related To
1	Parent Object Code	Parent Object Values	Project

- If the project is not listed under actual value, need to add project details under project name lookup name.

Lookup Header

Lookup Name: Parent Object Code, Lookup Code: , Description: Parent Object Values, Related To: Project, Regular Lookup: ☐

Lookup Values

#	Lookup Value	Lookup Code	Actual Value	Start Date	End Date	Attribute1	Attribute2	Attribute3	Enable
61	IMP EXT PUR PRICES		Pheonix	08/04/22		1070			✓
62	IMPORT AWARDS		Pheonix	08/04/22		1090			✓
63	INBOUND FISCAL DOC		Pheonix			570			✓
64	FA LEAST IMP		Pheonix			230			✓
65	IMP PRI RATE SCH OVRDS		Pheonix	08/04/22		1380			✓
66	IMPORT FUNDING		Pheonix	08/04/22		1240			✓
67	Inventory Management		Pheonix			1410			✓
68	Product Lifecycle Management		Pheonix			1400			✓
69	Account Payable		Pheonix						✓
70									

Creation of Child Object:

- Search for lookup name – object code – add the lookup value for child object from FBDI file which should be related to the parent object code.

The screenshot shows the 'Lookup Workbench' interface. In the 'Search Parameters' section, the 'Lookup Name' is set to 'Object Code'. Below this, the 'Select Lookup' table lists two options:

#	Lookup Name	Description	Related To
1	Object Code	Object Code Values	Parent Object Code
2	Parent Object Code	Parent Object Values	Project

Below the table, the 'Lookup Values' section shows a list of values with columns for #, Lookup Value, Lookup Code, Actual Value, Start Date, End Date, Attribute1, Attribute2, Attribute3, and Enable. The first few rows are visible:

#	Lookup Value	Lookup Code	Actual Value	Start Date	End Date	Attribute1	Attribute2	Attribute3	Enable
1...	Catalog Translatable		Product LifeCycle			2			✓
1...	Categories Interface		Product LifeCycle			3			✓
1...	Categories Translatable		Product LifeCycle			4			✓
1...	Catalog Interface		Product LifeCycle			1			✓
1...	Inventory Transactions		Inventory Man			2			✓
1...	Inventory Lots		Inventory Man			3			✓
1...	Inv Serial Numbers		Inventory Man			4			✓
1...	Transaction Costs		Inventory Man			5			✓
1...	Receiving Headers		Inventory Man			6			✓

Step 2:

Assign POD and Project:

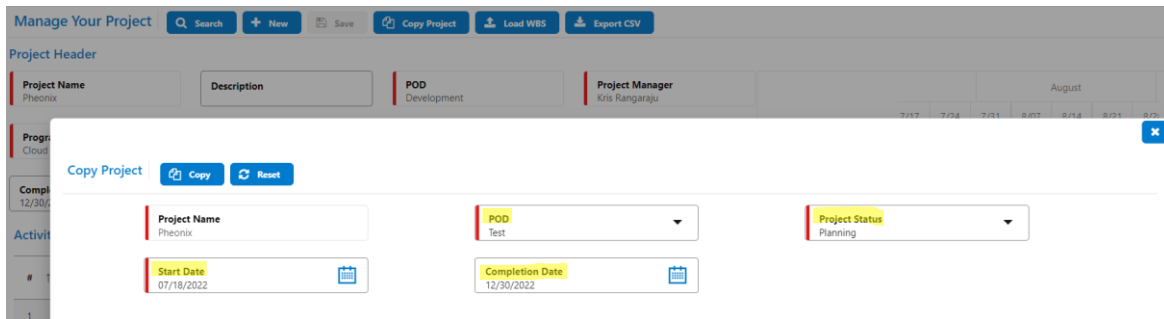
- Click on the Hamburger button –ConvertRite – Manage your project – New.
- Define project name, POD and all mandatory information- save (POD environment will be assigned to the project and object in this screen).

The screenshot shows the 'Manage Your Project' interface. The 'Project Header' section contains the following fields:

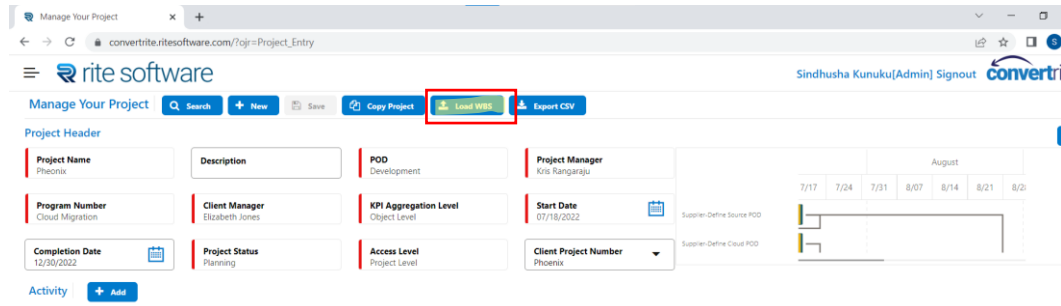
- Project Name (dropdown)
- Description (text field)
- POD (dropdown)
- Project Manager (dropdown)
- Program Number (dropdown)
- Client Manager (dropdown)
- KPI Aggregation Level (dropdown)
- Start Date (calendar icon, value: 11/28/2022)
- Completion Date (calendar icon, value: 12/31/2022)
- Project Status (dropdown)
- Access Level (dropdown)
- Client Project Number (dropdown)

The 'Activity' section shows a table with columns: #, Task Number, Task Name, Object Code, Task Type, Pre Requisite Task, Start Date, End Date, and Weightage. The table is currently empty, with the message 'No data to display'.

- Copy project is used to copy the complete project with same data into a different POD with project status, start and completion date.



- Click on Load WBS – Project will be assigned to parent object.

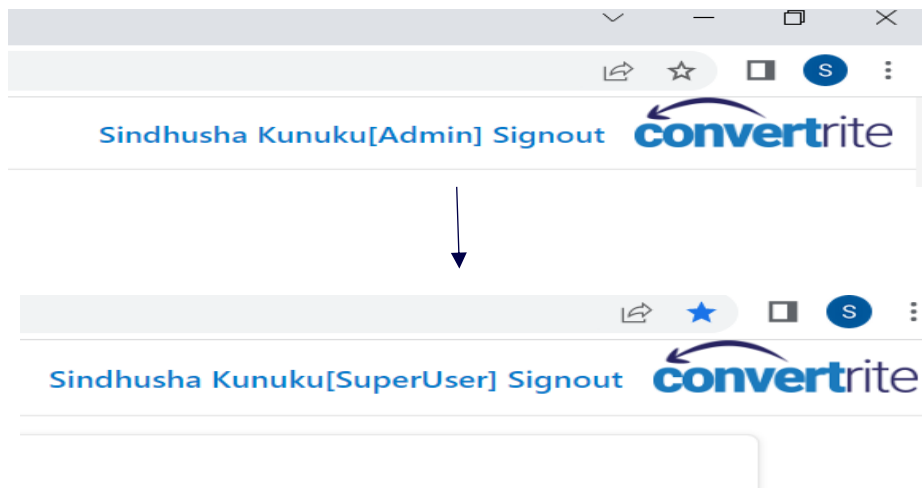


- If the project is created already, search for the required project and Load WBS [it can be done for the other parent object (Load WBS is parent object level)]

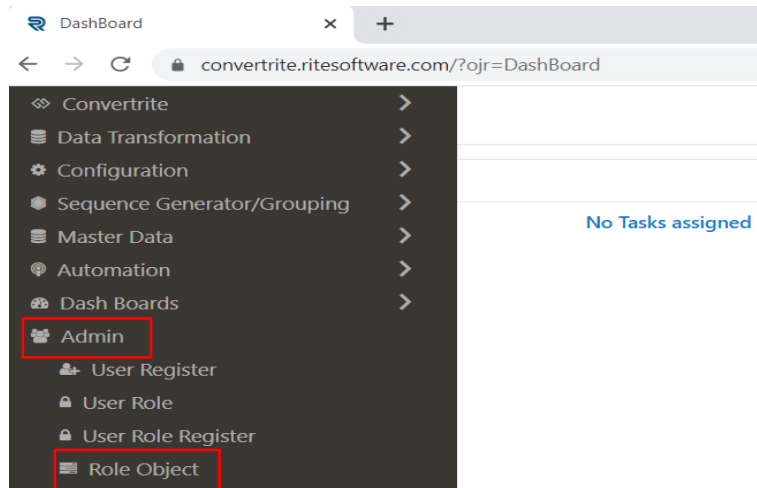
Step 3:

Assign Role Object:

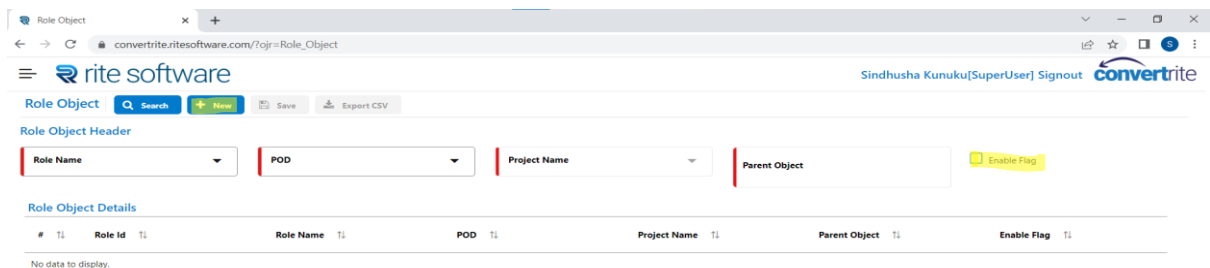
- We must Enable flag to activate the load metadata option.
- Click on the Admin – switch to SuperUser.



- In the SuperUser profile, click on the hamburger button on top left- admin – role object.



- Select the role name as admin, required POD, Project, parent object – Enable flag. Once done, switch back to admin.



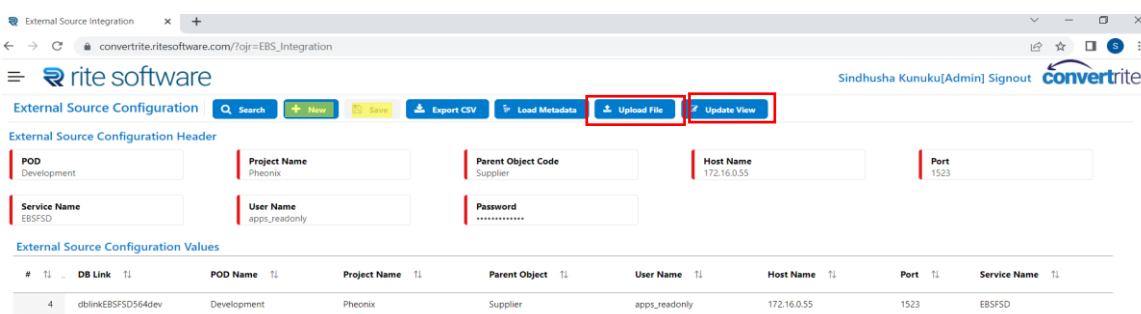
✓ Master data configuration done.

- We must configure and connect cloud/source to database to get metadata so that staging table can be created.
- On cloud side after completing configuration – load metadata should be done, on source side – both can be done on same screen.

Step 4:

Source Configuration: (Parent object level)

- Click on the Hamburger button- Configuration – External Source Configuration – New – fill up information – Save (Parent object level) – Upload file (View file provided by functional team).



- If parent object is available, we can use update view option to update any details. (To update view file for each individual child object).
- Click on the load metadata – structure is done.

Step 5:

Source Template workbench:

- Click on the Hamburger button-ConvertRite- Source Template Workbench- New – fill all required fields – Save- Create Table – Import Columns.

- BU Specific must be enabled assign the template at business user level.
 - Check the Normalize box to differentiate duplicate data (Process will be stopped if any duplicate data is identified).
- Select all columns displayed- Save.
- Click on the Baseline – Staging table name and view name will be displayed if we click on three dots (Staging table will have all the data but view have only required data).
- Select Orig trans ref - To link source and cloud columns data, unique identification for the records and also when we need 2 or more columns data to merge the data to 1 column in cloud.
 - Re Orig Tras ref is used when an Orig trans ref is already created and requirement is changed/updated - we can update re Orig trans based on the batch name.
- Load Data – success (make a note of the batch name – unique name should be given by us).

- While loading data, choose manual to upload small data through file and choose external option to upload large data.

Source Template Workbench

Template Header

Template Name: Third Party_5 | POD: Development | Project Name: Phoenix | Parent Object Code: Supplier | Object Code: Third Party | MetaData Table Name: XXXR_SUP_TPP_RELATIONSHIP

Load Data

Manual (selected) | Auto | External | Upload Template | EBS Integration | EBS Adapter

Object Loader-File

POD: Development | Project Name: Phoenix | Parent Object: Supplier | Object: Third Party

File Name: | Batch Name: | Staging Table Name: XXXR_THIRD_PARTY_206

Drag and Drop

Select or drop files here.

Step 6:

Cloud Access Configuration:

- Click on the Hamburger button – Configuration – Cloud Access configuration.
- Cloud Access Configuration screen is used to connect to the cloud SaaS environment with the required credentials.
- Cloud URL – SaaS URL and credentials will be provided by the functional team.

Cloud Access Configuration

Search | New | Save | Export CSV

Cloud Access Configuration Header

Cloud Url: https://fa-etao-dev20-saasfademo1.ds-fa.oracle | User Name: casey.brown | Password: *****

Cloud Access Configuration Values

#	Cloud Url	User Name	Password
1	https://fa-etao-dev20-saasfademo1.ds-fa.oraclepdemos.com	casey.brown	*****

Note: Cloud Access Configuration supports single pod only.

Step 7:

Cloud Configuration:

- Click on the Hamburger button – Configuration – Cloud Configuration.
- Click on New – Define all required info (From FBDI): Object Code – Ctrl File Name – Xlsm File Name – Sheet Name- Interface Table.

Cloud Configuration

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Cloud Configuration

Search | New | Save | Export CSV

Cloud Configuration Header

Object Code: UC_REF_ACNTS_V22C | Ctrl File Name: ArUpdRefAccounts | Xlsm File Name: UploadCustomersTemplate | Sheet Name: Reference Accounts

Interface Table: AR_UPD_REF_ACCOUNTS

Cloud Configuration Values

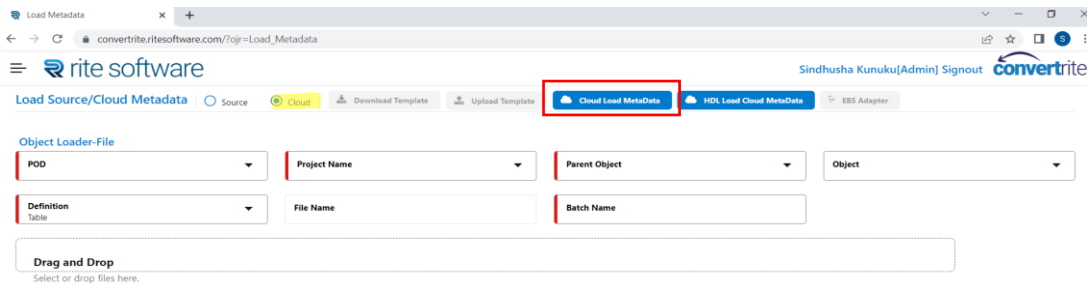
#	Object Name	Ctrl File Name	Xlsm File Name	Sheet Name	Interface Details
1	UC_REF_ACNTS_V22C	ArUpdRefAccounts	UploadCustomersTemplate	Reference Accounts	AR_UPD_REF_ACCOUNTS

- Hence Connected to cloud. We must get the structure – through load meta data step. (Only after role object -parent object level).

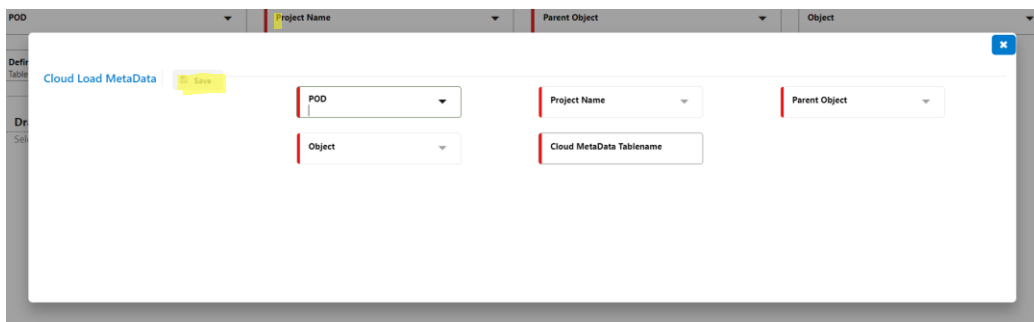
Step 8:

Cloud Load Metadata:

- Click on the Hamburger button-Master Data- Load metadata- select Cloud – Cloud Load Metadata.



- On the pop-up screen, select all the required data – Metadata table will be created.

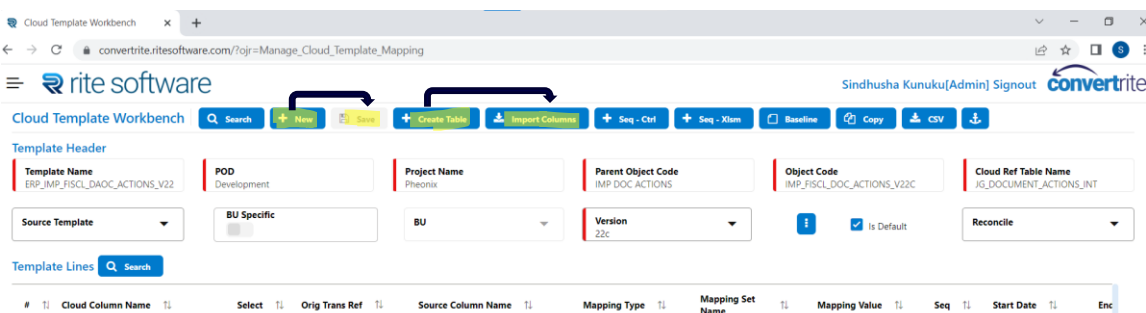


- We can load metadata to source by selecting Source radio- click on EBS adapter.
- By Clicking on EBS adapter, it will re-direct to external source configuration screen where we can select particular parent object to create metadata, click on upload file and load data.

Step 9:

Cloud Staging table:

- Click on the Hamburger button - ConvertRite – Cloud Template Workbench – New – fill all required information- Save – Create Table – Import Columns.



- In the source template field- the new template we have created should be available, select that source template and SAVE.

- Source columns will be added and listed on this screen.
- On the Cloud Template Workbench – click on the anchor icon (on top right) which is called user hooks (Extraction, validation & transformation, and cloud import).

- We can enable pre or post hook to manipulate any data before or after validation.
- Hook value = Any SQL query (As provided).

Step 10:

Sequence Generator:

- Now to generate sequence – go to hamburger button- Sequence Generator/Grouping – FBDI Workbench (Ctrl) – New - Fill all the details – choose Auto – Save.
- **Note:** We can generate sequence using Ctrl file [FBDI workbench (ctrl)] or Xlsm file [FBDI workbench (xlsm)]

- Switch back to Cloud Template Workbench – Seq+ ctrl button will be enabled, click on it and sort sequence.

Cloud Template Workbench

Search New Save Create Table Import Columns **+ Seq - Ctrl** + Seq - Xtem Baseline Copy CSV

Template Header

Template Name ERP_SBA_IBY_TEMP_EXT_BANK_ACCT POD Development Project Name Phoenix Parent Object Code SUPPLIER BANK ACCOUNT IMP Object Code SBA_IBY_TEMP_EXT_BANK_ACCTS_V Cloud Ref Table Name IBY_TEMP_EXT_BANK_ACCTS

Source Template BU Specific BU Version 22c Is Default Reconcile

Template Lines Search

#	Cloud Column Name	Select	Orig Trans Ref	Source Column Name	Mapping Type	Mapping Set Name	Mapping Value	Seq	Start Date	Enc
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Step 11:

- We must do the mapping (after generating sequence) – information will be provided by source/functional team.

Mapping types:

- As – Is - Moves X - X
 - Prefix - Add X - (Before data value)
 - Suffix - Add- X (After the data value)
 - Constant - Source no value but should sent constant value to cloud
 - One to One - One field of source will be mapped to one cloud value
 - Two to One - Two fields of source will be mapped to one cloud value
 - Three to One - Three fields of source will be mapped to one cloud value
 - Formula set - Write query to do other conversions (optional values)
- Click on the hamburger button- Data Transformation- Define Mapping Set (To Define 1-1, 2-1, 3-1) -New- define all information and save.
 - Once the mapping set is saved, add mapping set values (column – column).

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Define Mapping Set Search New Save Copy Upload File Export CSV

Mapping Set Header

Mapping Name New Mapping Mapping Type POD Project Name Parent Object Code Where Clause

Source Object 1 Source Object 2 Source Object 3 Object Code Cloud Column Lookup Type

Source Column 1 Source Column 2 Source Column 3

Mapping Set Values Add

#	Source Field1	Source Field2	Source Field3	Cloud Value	Enable
---	---------------	---------------	---------------	-------------	--------

No data to display.

- Source Object - View file from the source template
- Source Column – Column name in the source side
- Source Field – Column value in the source side
- Cloud Column – Column name from the cloud side (This information will be provided by functional team)
- Cloud Value –Column value to be updated on the cloud side
- We must write the condition for 1-1, 2-1 and 3-1 mappings in **Where Clause**.

- SQL query will be generated by the application on the backend and hence transforms the data.

Define Mapping Set:

- To define any other mapping type to transform the data - Click on menu- Data Transformation- Define Formula Set –we can write required SQL query.
- We have 3 Formula types – Java, SQL and function.
- Test SQL is used to test the SQL query written by us.
- Test Data is used to test the data with given SQL query at Orig trans level.
- Original Trans Ref – The records that we select as org trans ref in the source side.
- Formula value – Expected value should be given.
- SQL Query – Should be written on Org trans ref.
- Test SQL – To test the SQL query written.
- Test Data – To test the data that we got by the sql query written.

Step 12:

In Cloud template workbench:

- Select all the columns for which sequence is generated – Save - Click on Baseline to create table.

Step 13:

Validation:

- Click on the Hamburger button- ConvertRite- Cloud Conversions Workbench – select the template name and batch name [get that from source template workbench(unique)]

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Conversions Workbench Transform Re-Process FBDI Reconcile HDL Export CSV

Select Template Select Batch Name

Recent Actions Refresh

#	Template Name	Parent Object Code	Request Type	Status	Total Records	Completed %	Pro Rec
1	ERP_SUP_ADDRESSES_22b	Supplier	VALIDATION	✓	1300	100	1
2	ERP_SUPPLIER_22b	Supplier	VALIDATION	✓	397	100	1
3	INVOICE LINES_C	Account Payable	VALIDATION	✓	68269	68	1

Filter By Template

- Click on the transform to validate and convert.
- Once done, ConvertRite application needs to be connected to oracle fusion to run the jobs.
 - Re-Process option is used to re-validate only failed records after correcting the errors.
 - FBDI – File based data import- is the file generated after the conversions in our application before moving into the cloud.
 - FBDI – is only for ERP modelling, HDL – is for HCM related data.

Step 14:

Load Import Metadata:

- So, click on the hamburger button-Go to the Master Data option under – Load Import Metadata – fill the information provided by the respective functional team – Save.

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Load Import MetaData Search New Save Export CSV

Load Import MetaData Header

Parent Object Code Object Code Account Name Interface Table

Import Job Name Document Security Group

Load Import MetaData Values

#	Parent Object Code	Object Code	Account Name	Job Name	Interface Details	Document Security Group
No data to display.						

Step 15:

Cloud Load Import:

- Click on the hamburger button- ConvertRite- Cloud Load Import – select template name, batch name, parameter list –based on the parent object level.

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Cloud Load Import New Load Import Reconcile Rejection Report Reconcile Report Export CSV

Cloud Load Import Header

Template Name Select Batch Name Parameter List

Cloud Load Import Values Search

#	ID	Template Name	File Name	Document Security Group	Document Account	Job Name	Result	Reconcile
1	3268	ERP_SUP_PRODUCT AND SERVICES_22b	Product and Services.zip	FAFusionImportExport	prc/supplier/import	/oracle/apps/ess/prc/poz/supplierimport/ImportSupplierProductsandServicesCategory	7310253	
2	3267	ERP_SUP_BUSINESS CLASSIFICATIONS_22b	Business Classifications.zip	FAFusionImportExport	prc/supplier/import	/oracle/apps/ess/prc/poz/supplierimport/ImportSupplierBusinessClassifications	7310250	

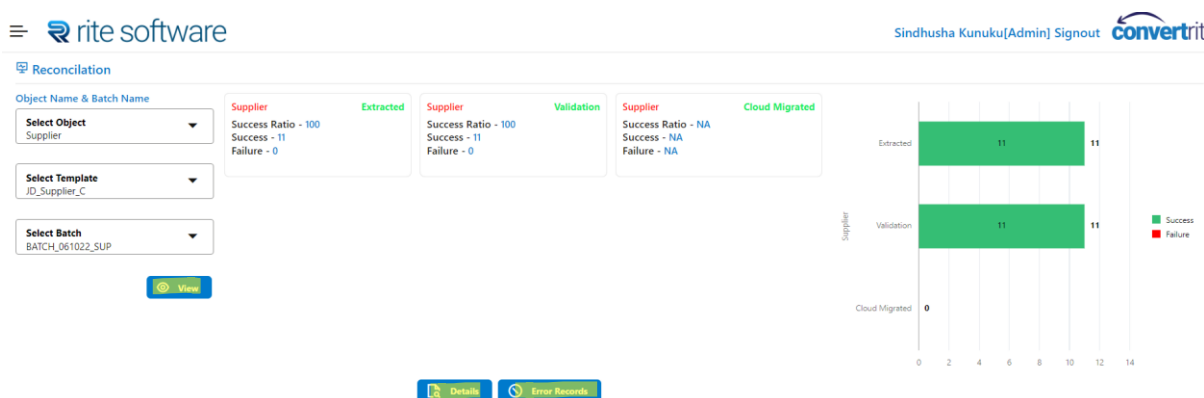
- Click on the Load Import – request will be submitted, and result ID should be generated.

- Reconcile – When we click this button, it hits the template and compares.
- Reconcile Report – Generates all the reports Pass/Fail.
- Rejection Report – Only the details of rejected results in reconcile.

Reconciliation

Data reconciliation (DR) is a term typically used to describe a verification phase during a data migration where the target data is compared against original source data to ensure that the migration architecture has transferred the data correctly. Reconciliation is the process of ensuring that two sets of records are in agreement.

- Click on the hamburger button- Dash Boards – Reconcile – select object, cloud template, cloud batch-view.



- We will get the results of source data extracted, validated and data migrated to the cloud.
- We can check error records and details.

Other Screens

Load Cockpit:

Let's say object and the flow is already created – to load the data- transform and cloud data loading for the same parent object with different child objects in the same screen.

- We can use Load Cockpit option from the Hamburger button- Automation- Load Cockpit – New – fill up all the information.
- Cloud and Source templates should be created/available to use Load Cockpit option.

- Click on Load Source Data button – same functionality as to Load Data from Source Template Workbench.

- Enter the Unique Batch Name.
- Click on the Transform to validate all mapping of Cloud Template Workbench screen.

Load Import New Auto Manual Load Source (Denormalize) Load Source (Normalize) Transform FBDI Cloud Load Import Reconcile

Load Import Header

POD Project Name Parent Object Code Object Code Batch Name

Select Template

Load Source Data Transform Cloud Load Import

Load Source Data Status

Template	Staging Table	No of Records	Message	Error
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- If you want to upload file manually, choose manual radio button.
- If the file-based data is different for all the objects– then upload the file from Load Source (Denormalize) and if file based data is same for all the objects then File can be uploaded from load source (Normalise).

Source Conversions workbench:

- Click on the Hamburger button- ConvertRite – Source Conversions Workbench- select the template to check failed records.

Source Conversions Workbench

Select Template JD_Supplier_S

Recent Actions Refresh Export CSV

#	Template Name	Parent Object Code	Total Records	Processed Records	Failed Records	Created By	Creation Date	Status
1	JD_Supplier_S	Supplier	12	11	1	ConvertRite	10/6/2022, 4:47:12 PM	
2	JD_Supplier_S	Supplier	10	10	0	CONVRITE	10/6/2022, 4:20:47 PM	
5	JD_Supplier_S	Supplier	10	10	0	CONVRITE	10/5/2022, 5:57:05 PM	
6	JD_Supplier_S	Supplier	10	10	0	CONVRITE	10/5/2022, 5:02:50 PM	
8	JD_Supplier_S	Supplier	10	10	0	CONVRITE	10/5/2022, 4:37:09 PM	

Pages 1 of 1

Filter By Template

Template	Count
JD_Supplier_Assignments_S	10
JD_Supplier_S TEMPLATE	20
JD_Supplier_S	51

- In this screen we can check and access failed records when we are extracting/loading source data.
- Download option under status will be enabled only when we use external option to upload file in the source template workbench.

Source Conversions Workbench

Select Template

Recent Actions Refresh Export CSV

Template Name	Parent Object Code	Total Records	Processed Records	Failed Records	Created By	Creation Date	Status
Supplier	Supplier	12	11	1	ConvertRite	10/6/2022, 4:47:12 PM	Download
Supplier	Supplier	10	10	0	CONVRITE	10/6/2022, 4:20:47 PM	Download

HCM Load Import:

- Click on the hamburger button - ConvertRite – HCM Load import – New –fill all required details - Load and Import.

HCM Load Import Search New Load & Import Reconcile Reconcile Rept Summary Summary Rept Export CSV

HCM Load Import Header

POD: Project Name: Parent Object Code: Cloud Template: Select Batch Name:

Document Account: Document Security Group: Document Author: Document Title:

HCM Load Import Values

#	Process Id	Content Id	Cloud Template	Document Title	Document Account	Document Author	Document Security Group	Result
1	6542091	UCMFA03786853	HCM Worker_C	Worker.zip	hcm\$/dataloader\$/import\$	casey.brown	FAFusionImportExport	Status

- HCM Load Import screen is used to migrate data directly into cloud when we are dealing with HCM object codes.
- Summary Button hits the summary of the cloud table and Summary report generates the file with summary data.

Date Configuration:

- Click on the hamburger button – Configuration – Date Configuration - New- Fill details- Save.

Date Configuration Search New Save Export CSV

Date Configuration Header

POD: Project Name: Parent Object Code: Object Code:

Source Date Format: Cloud Date Format:

Date Configuration Values

#	POD	Project Name	Parent Object	Object Code	Source Date Format	Cloud Date Format
1	Development	Pheonix	Account Payable	Invoice Header	DD-MM-YYYY	YYYY/MM/DD

- Date configuration screen is used to change the source date format before converting the data as the required date format in cloud.

FBDI Workbench (XLSM):

- Click on the hamburger button – Sequence Generator/Grouping – FBDI Workbench (Xlsm) -New – Save.

FBDI Workbench (XLSM) Search New Save Export CSV Download Comments Save As Blob

FBDI(XLSM) Header

POD: Project Name: Parent Object Code: Object Code:

Template Name: Sheet Name: Version: API:

FBDI(XLSM) Values

#	Sequence	Database Table	Column	API	Parameter	Start Date	End Date
1	10	AP_INVOICES_INTERFACE					
2	20	AP_INVOICES_INTERFACE					

- FBDI Workbench (Xlsm) screen is used to generate sequence based on the xlsx file in the cloud database.
 - Download comments – downloads the column details with description.
 - Save as Blob – History of object sequence with version will be saved for future reference.

Object Grouping:

- Click on the hamburger button - Sequence Generator/Grouping – Object Grouping.
- Object grouping is used to group the objects based on Excel File of Cloud.

Object Grouping Search New Save Export CSV

Object Group Header

Group Name: AP INVOICES CTL File: Import Payables Invoices Version: 22b POD: ▼

Project Name: ▼ Parent Object Code: ▼

Object Group Values Add

#	Object Code
1	Invoice Header
2	Invoice Lines

- If we do Object grouping, template grouping should be done.

Template Grouping:

- Click on the hamburger button - Sequence Generator/Grouping –Template Grouping.

Template Grouping Search New Save Export CSV

Template Group Header

Group Name: SITES_GROUP Select Template: JD Sites C Version: 22b

Template Group Values

#	Template	Group Id	Group Name	Version	Is Zipped
1	JD_Sites_C	502	SITES_GROUP	22b	N

- Template Grouping screen is used to group the same objects that are grouped in the object grouping by selecting template.

Cloud Sql Adhoc Query:

- Click on the hamburger button – Master data – Cloud SQL Adhoc Query –New – Write SQL query.

Cloud Sql Adhoc Query Search New Save Download Refresh

Sql Query Header

SQL Query: Select DISTINCT LOOKUP_TYPE,LOOKUP_CODE from frnd_lookup_values where LAST_UPDATE_DATE > '2022-11-23 18:30:00.0' or CREATION_DATE > '2022-11-23 18:30:00.0'

Description: ConvertRite ☒ Update Cloud Lookup Data

Sql Query Values

#	Sql Query	Path	Description	Status
1	Select DISTINCT LOOKUP_TYPE,LOOKUP_CODE from frnd_lookup_values where LAST_UPDATE_DATE > '2022-11-23 18:30:00.0' or CREATION_DATE > '2022-11-23 18:30:00.0'		ConvertRite	Completed

- This screen is used to get the lookups from cloud with SQL query.
- Check the Update cloud lookup data box to update data in the lookup.

Load Cockpit – HCM:

- Click on the hamburger button - Automation – Load Cockpit HCM – fill the required info – Load Source Data (Auto) – Transform – HCM Cloud Import.

Abbreviations

Abbreviation	Full Form
ERP	Enterprise Resource Planning
POD	Product Oriented Delivery
HDL	HCM Data Loader
FBDI	File Based Data Import
Orig Trans Ref	Original Transaction References
BU	Business Unit