rite software

convertrite

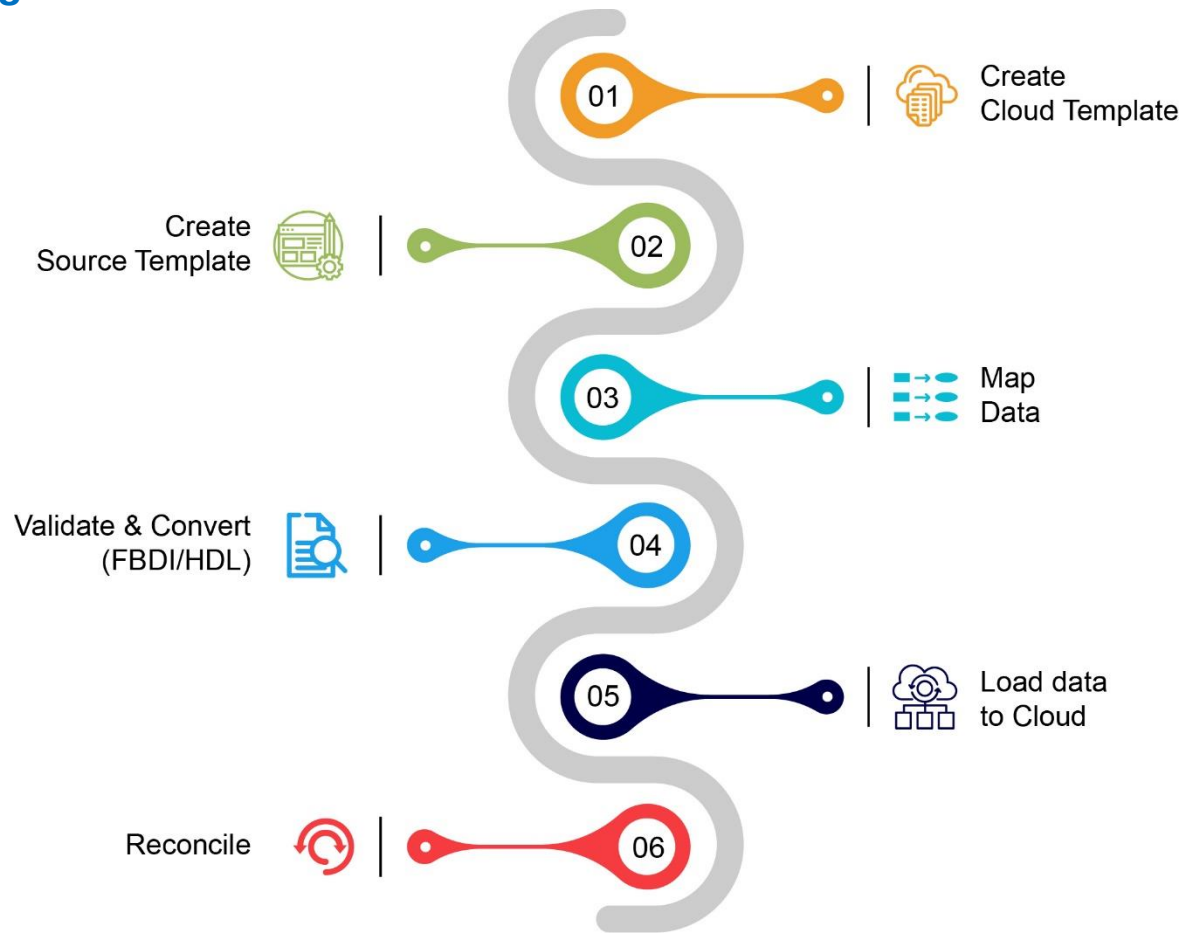
User Manual

Table of Contents

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



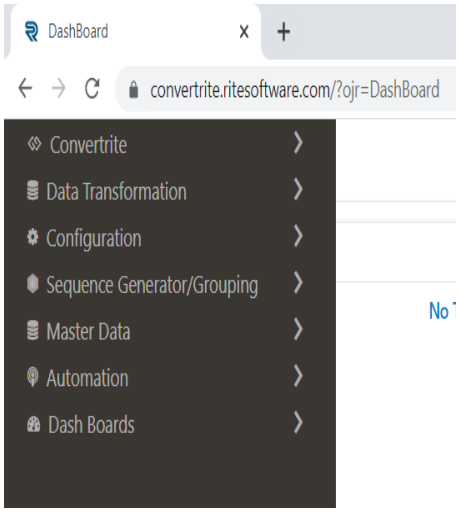
Login Information

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

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

Workflow

Click on  hamburger menu on top left for application navigation.



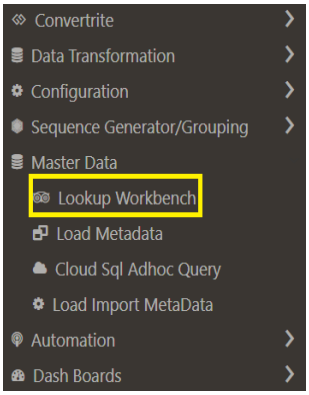
- Project, POD, Parent object and child object (object code) are Master data.

STEP 1:

Creation of POD:

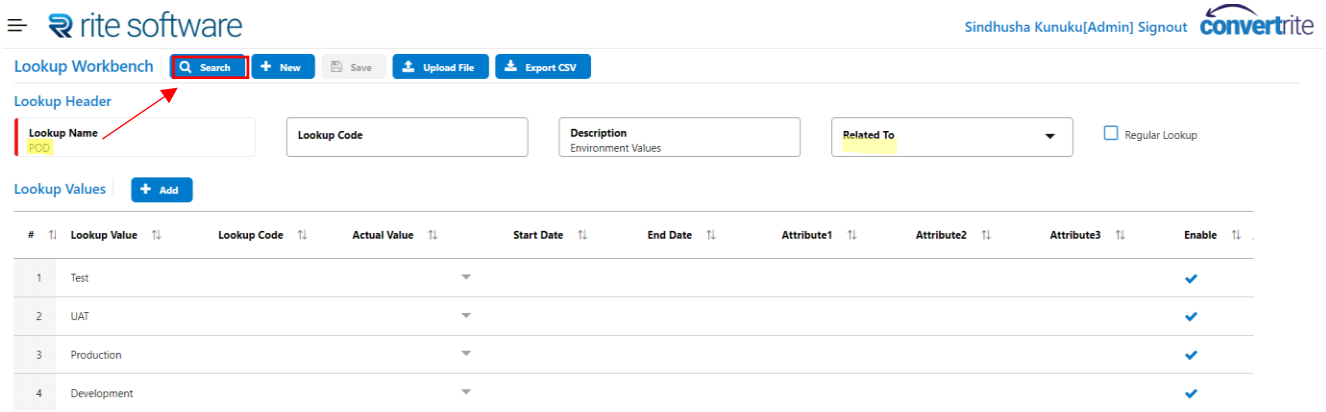
POD - The Product Oriented Delivery (POD) model is a software development strategy that centers on building small cross-functional teams that own specific tasks or requirements for a project.

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.

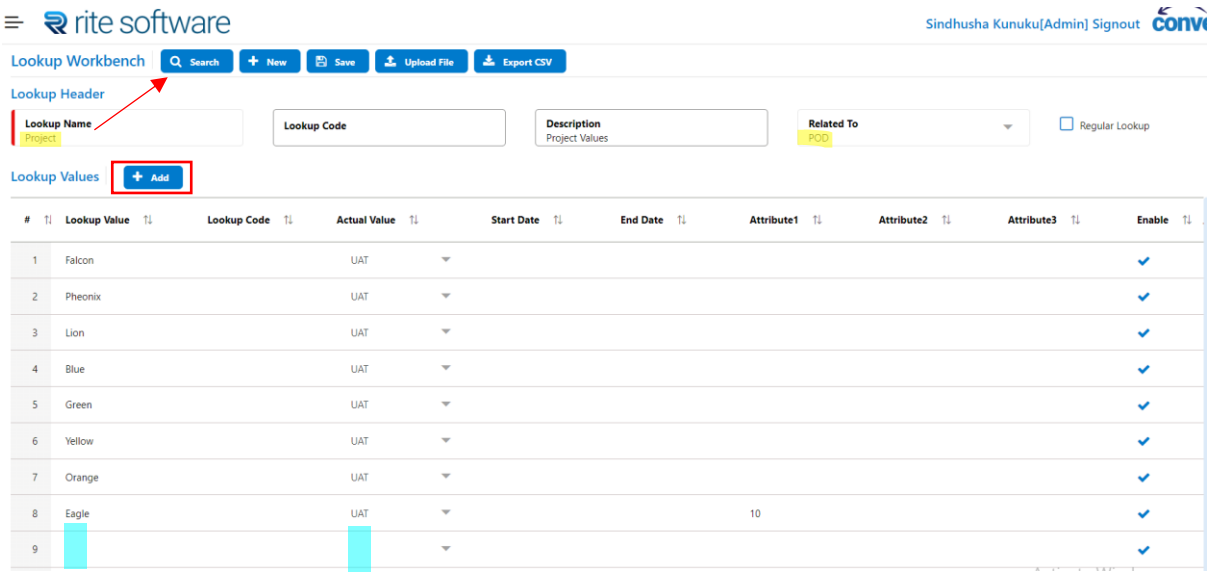
- Export CSV – Export CSV button downloads all the file based data on this particular screen.



Creation of Project:

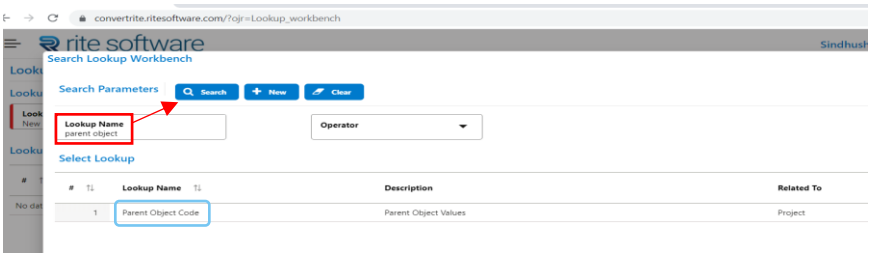
- To create the project, in the lookup header – search for the Lookup name as Project and add the Lookup value – your project details.

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

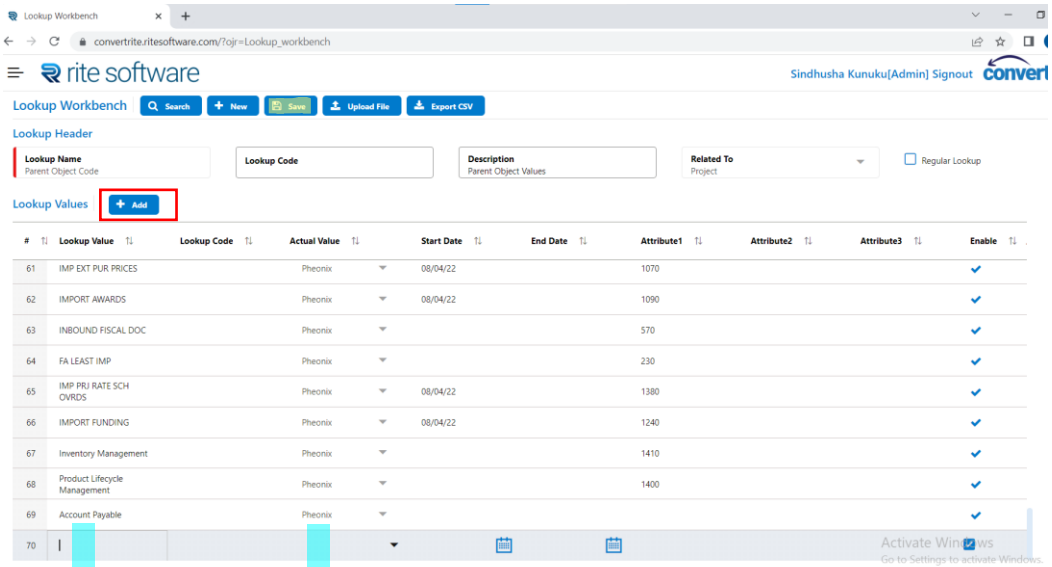


Creation of Parent Object:

- 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.

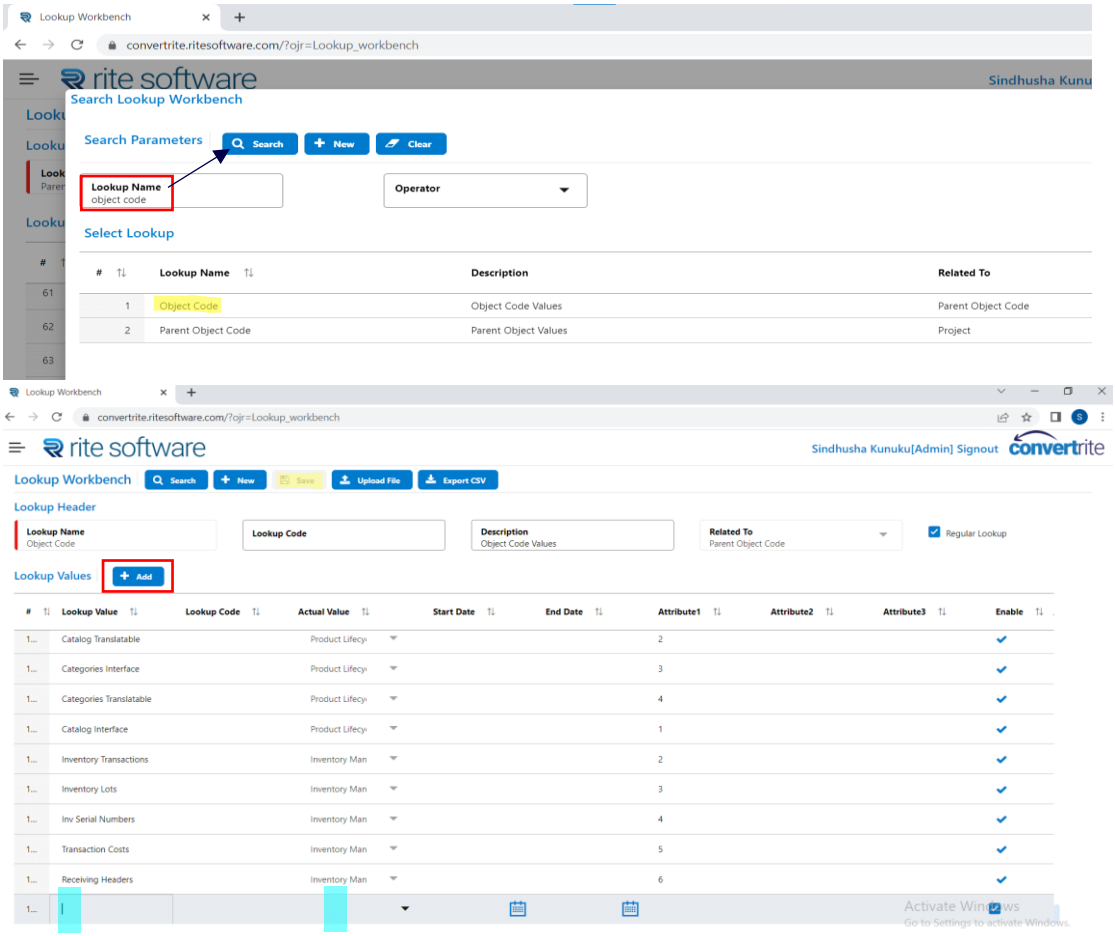


- If the project is not listed under actual value, need to add project details under project name lookup name.



Creation of Child Object:

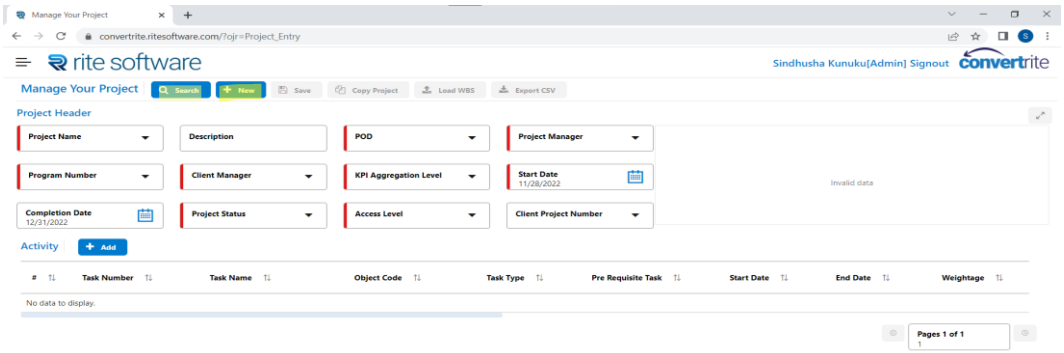
- Search for lookup name – object code – add the lookup value for child object from FBDI file which should be related to the parent object code.



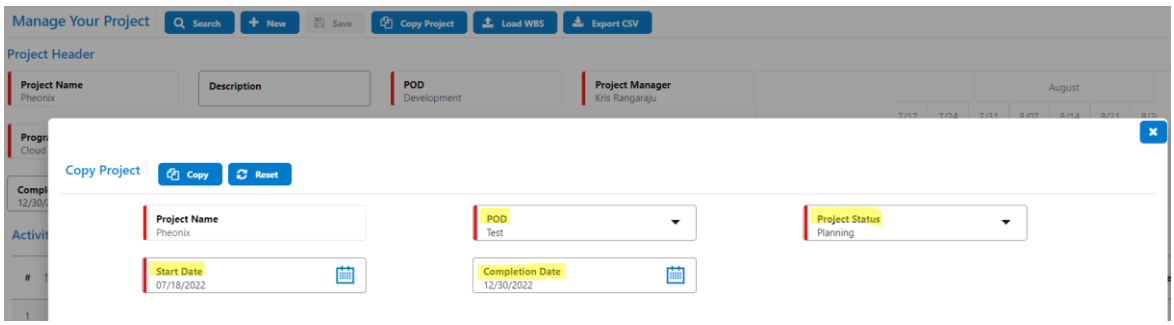
Step 2:

Assign POD and Project:

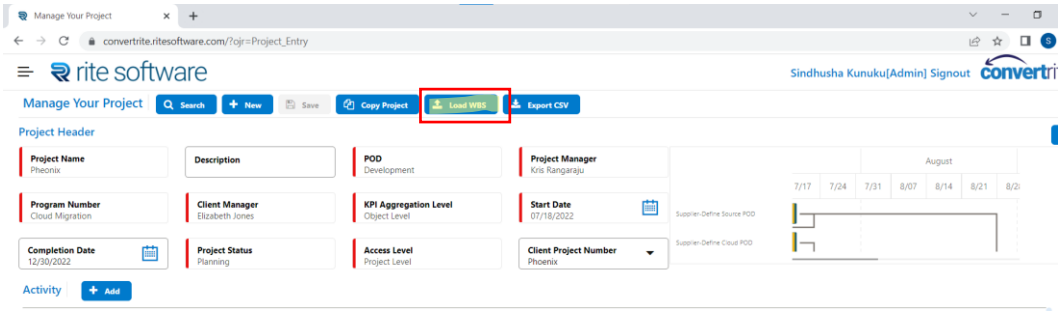
- Click on the Hamburger button –ConvertRite – Manage your project – New.
- Define project name, POD and all mandatory information- save (POD environment will be assigned to the project and object in this screen).



- 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.

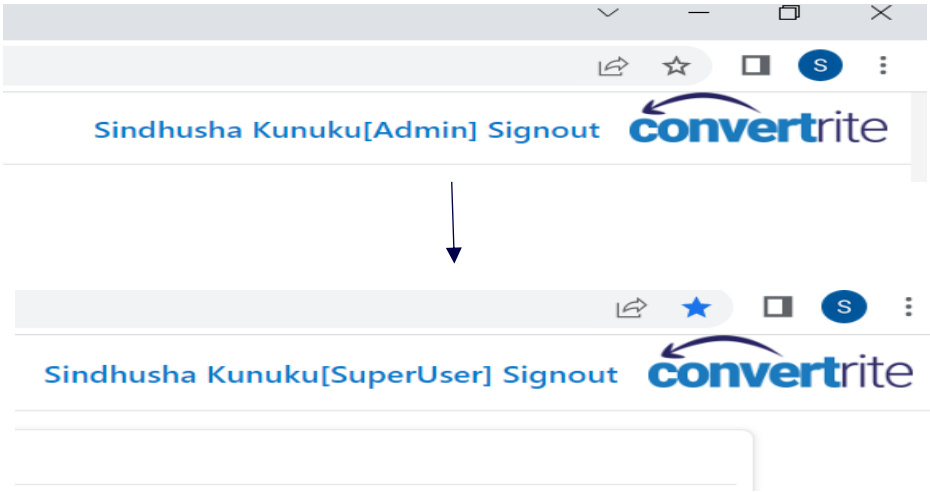


- If the project is created already, search for the required project and Load WBS [it can be done for the other parent object (Load WBS is parent object level)]

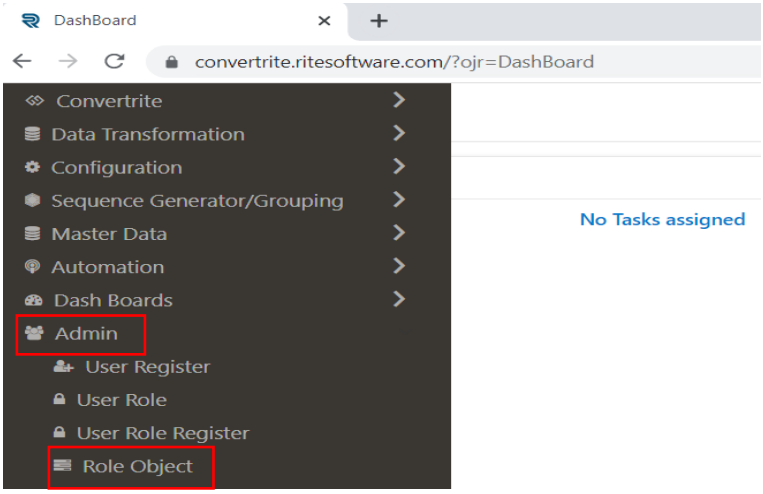
Step 3:

Assign Role Object:

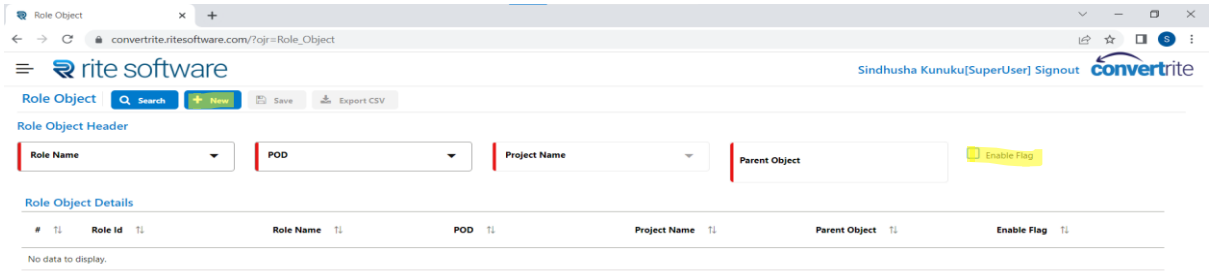
- We must Enable flag to activate the load metadata option.
- Click on the Admin – switch to SuperUser.



- 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.



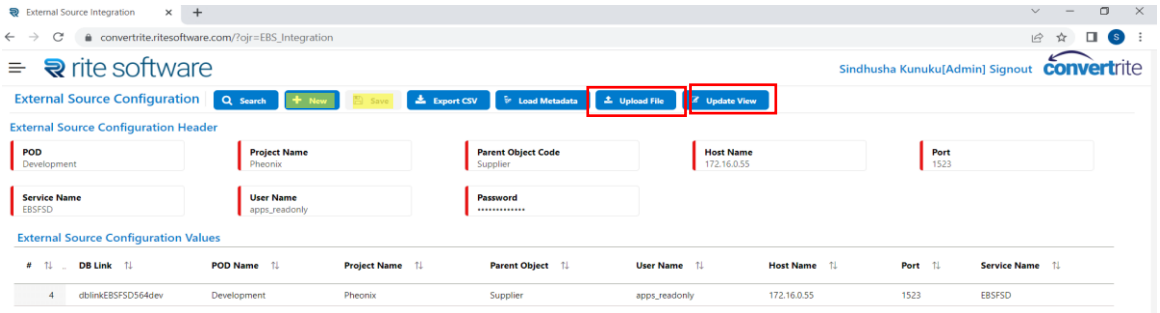
✓ **Master data configuration done**.

- We must configure and connect cloud/source to database to get metadata so that stagging 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).

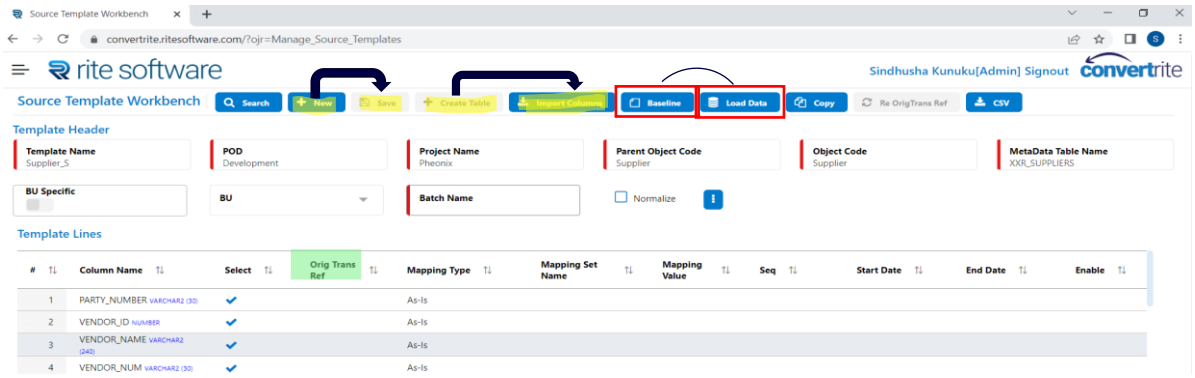


- If parent object is available, we can use update view option to update any details. (To update view file for each individual child object).
- Click on the load metadata – structure is done.

Step 5:

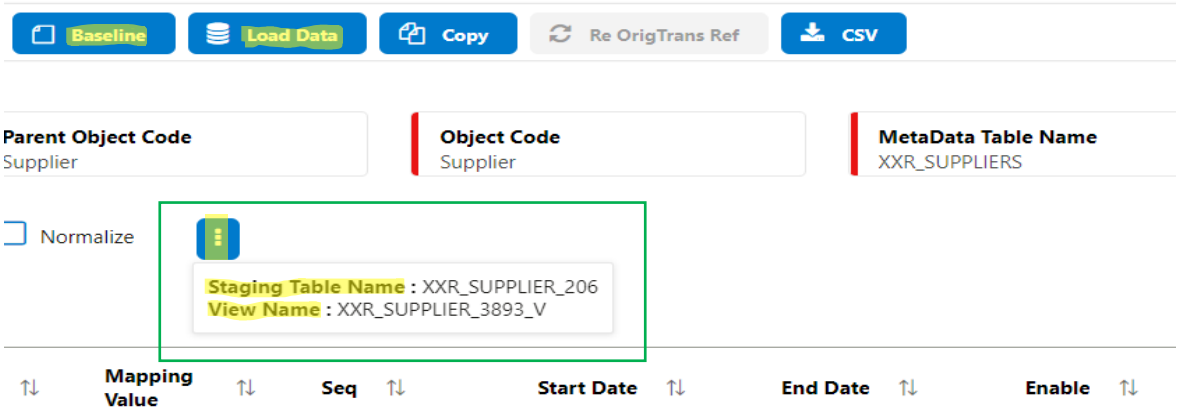
Source Template workbench:

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

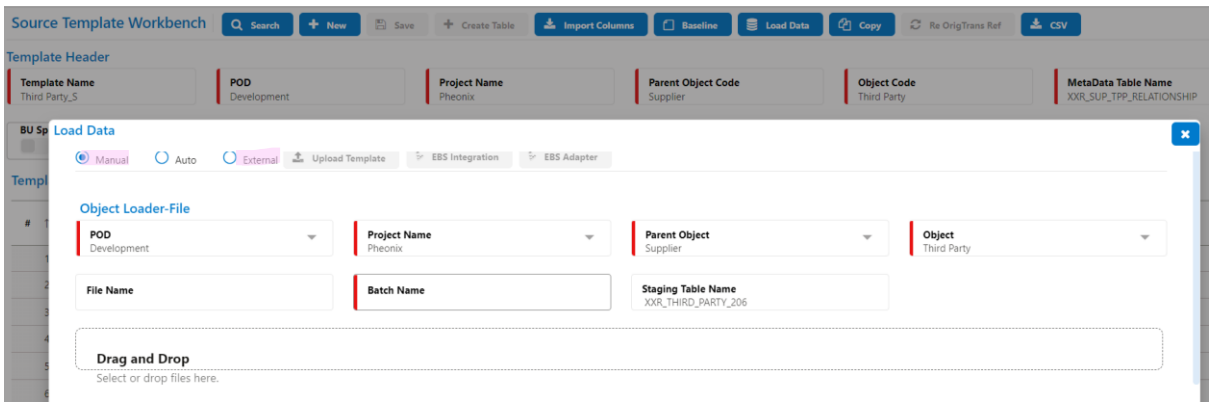


  - BU Specific must be enabled assign the template at business user level.
  - Check the Normalize box to differentiate duplicate data (Process will be stopped if any duplicate data is identified).

- Select all columns displayed- Save.
- Click on the Baseline – Stagging table name and view name will be displayed if we click on three dots (Stagging 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).



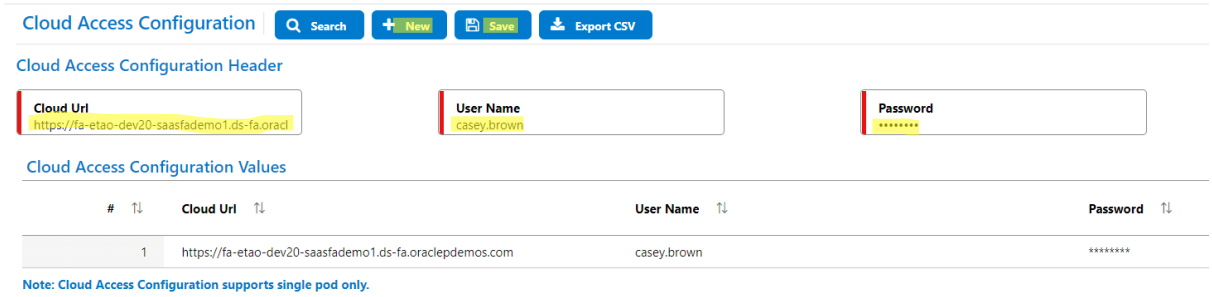
  - While loading data, choose manual to upload small data through file and choose external option to upload large data.



Step 6:

Cloud Access Configuration:

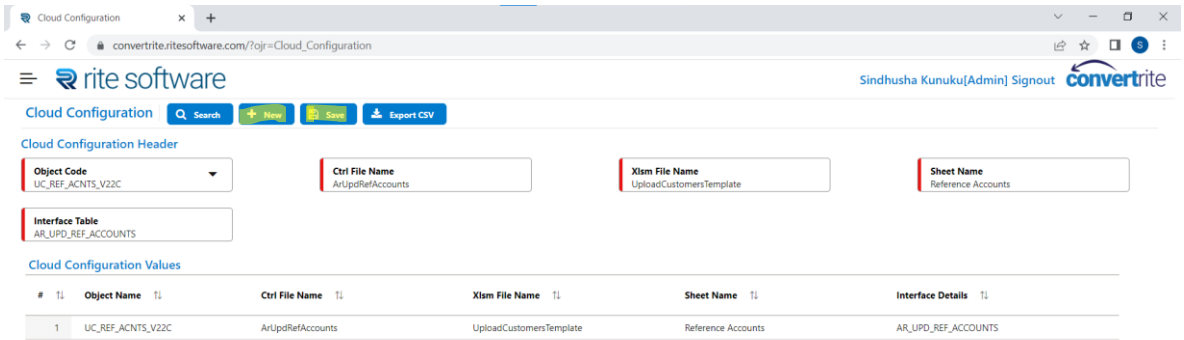
- Click on the Hamburger button – Configuration – Cloud Access configuration.
- Cloud Access Configuration screen is used to connect to the cloud SaaS environment with the required credentials.
- Cloud URL – SaaS URL and credentials will be provided by the functional team.



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.

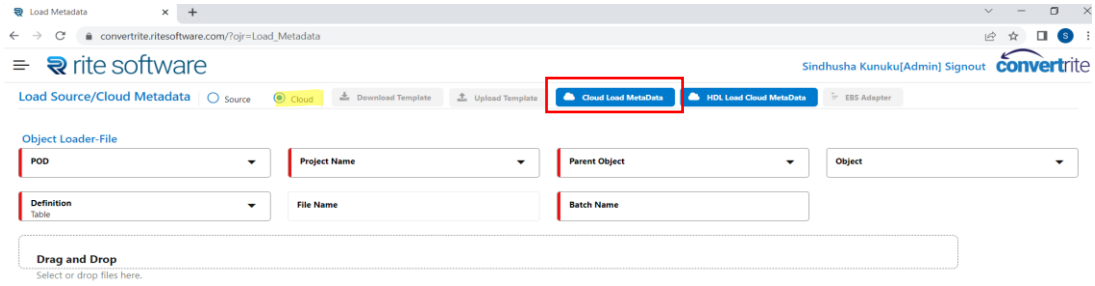


- Hence Connected to cloud. We must get the structure – through load meta data step. (Only after role object -parent object level).

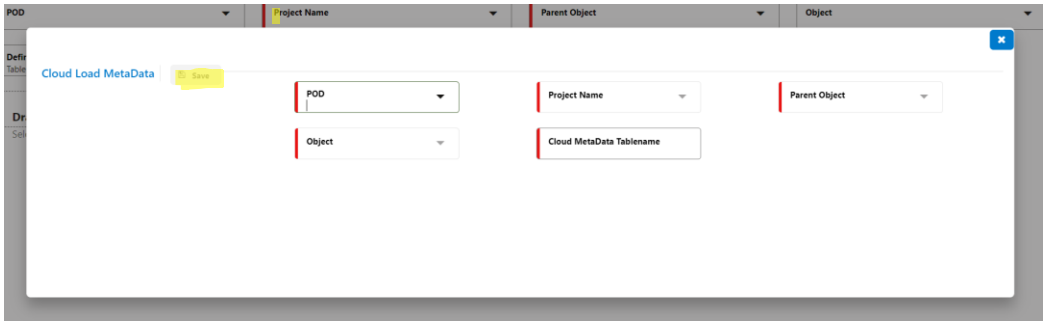
Step 8:

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.

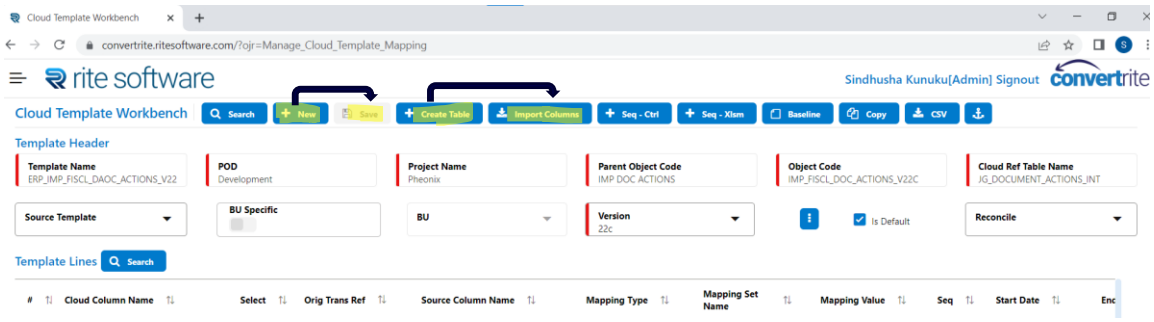


- ➢ We can load metadata to source by selecting Source radio- click on EBS adapter.
- ➢ By Clicking on EBS adapter, it will re-direct to external source configuration screen where we can select particular parent object to create metadata, click on upload file and load data.

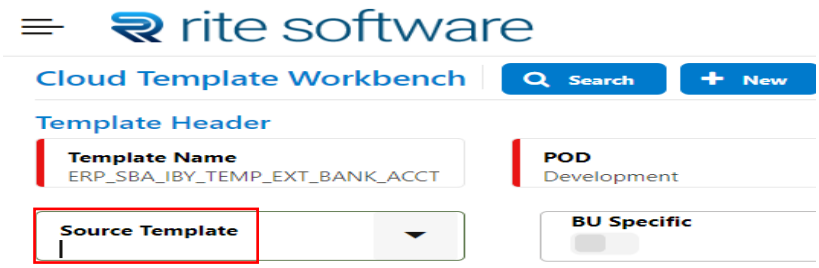
Step 9:

Cloud Stagging table:

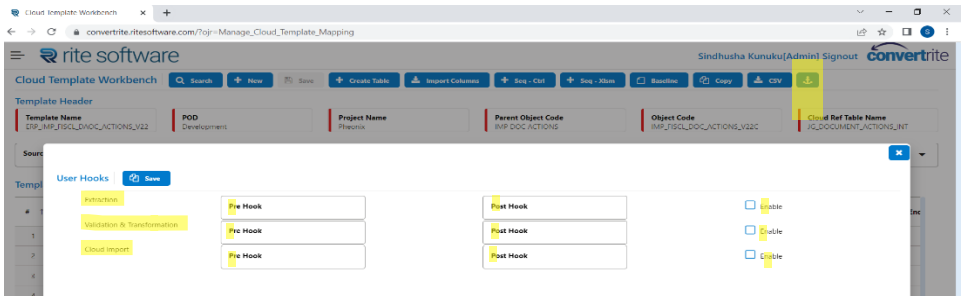
- Click on the Hamburger button - ConvertRite – Cloud Template Workbench – New – fill all required information- Save – Create Table – Import Columns.



- 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).

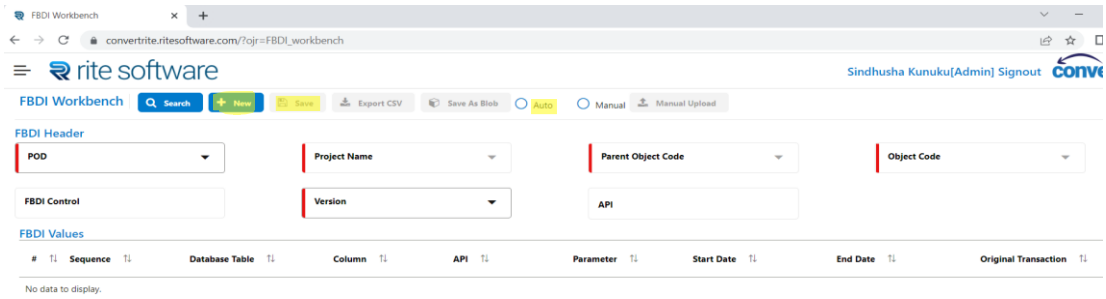


- We can enable pre or post hook to manipulate any data before or after validation.
- Hook value = Any SQL query (As provided).

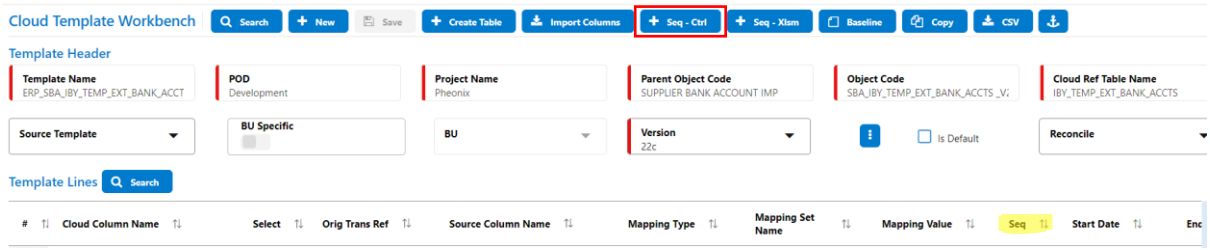
Step 10:

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.



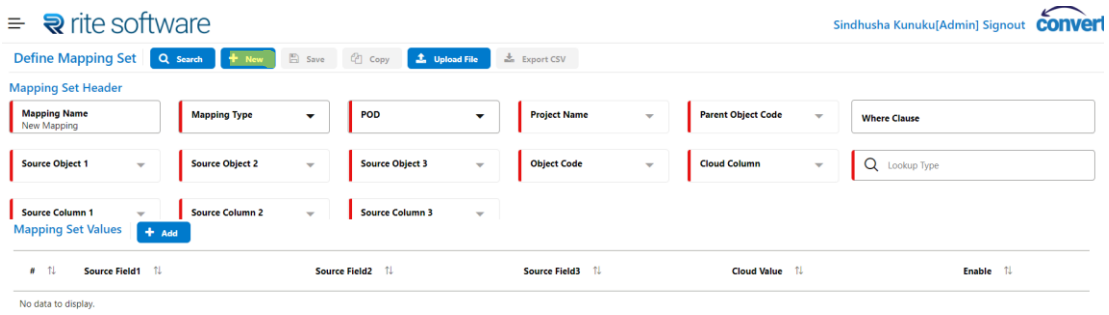
Step 11:

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

Mapping types:

1. As – Is - Moves X - X
2. Prefix - Add X - …... (Before data value)
3. Suffix - Add ……- X (After the data value)
4. Constant - Source no value but should sent constant value to cloud
5. One to One - One field of source will be mapped to one cloud value
6. Two to One - Two fields of source will be mapped to one cloud value
7. Three to One - Three fields of source will be mapped to one cloud value
8. 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).

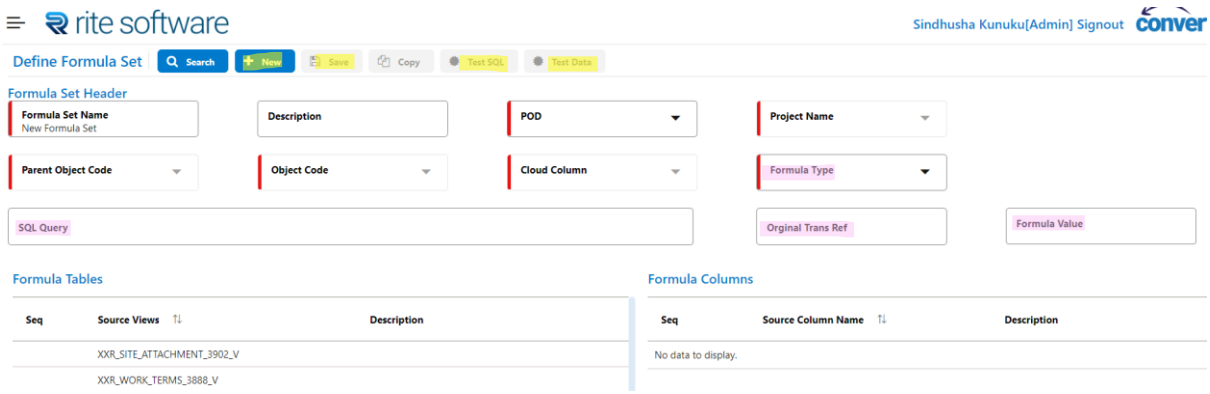


- Source Object - View file from the source template
- Source Column – Column name in the source side
- Source Field – Column value in the source side
- Cloud Column – Column name from the cloud side (This information will be provided by functional team)
- Cloud Value –Column value to be updated on the 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:

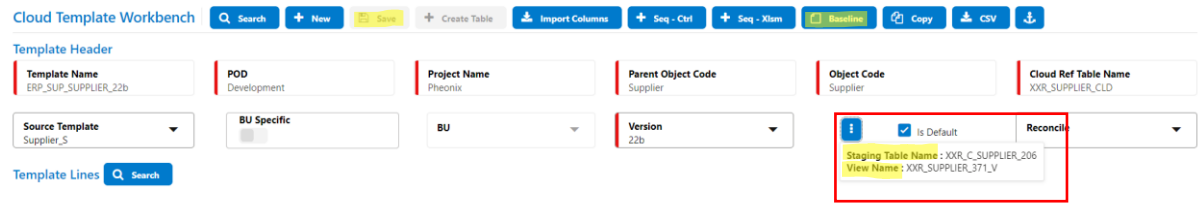
- To define any other mapping type to transform the data - Click on menu- Data Transformation- Define Formula Set –we can write required SQL query.
- We have 3 Formula types – Java, SQL and function.
- Test SQL is used to test the SQL query written by us.
- Test Data is used to test the data with given 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:

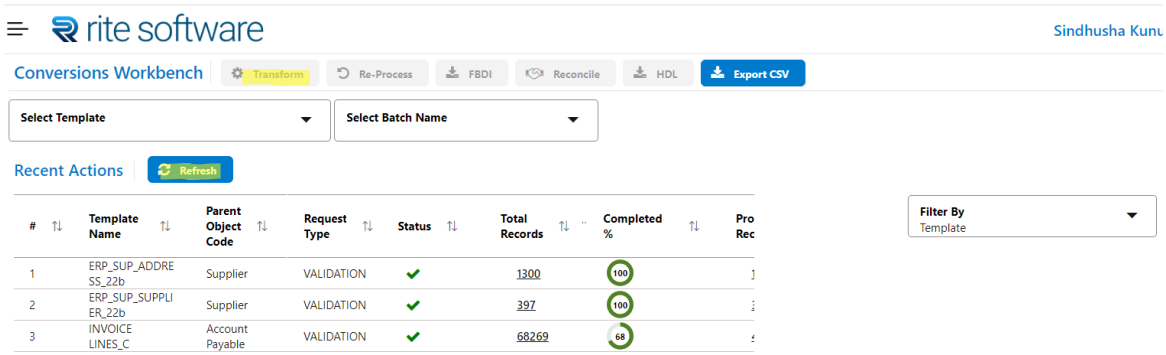
- Select all the columns for which sequence is generated – Save - Click on Baseline to create table.



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)]

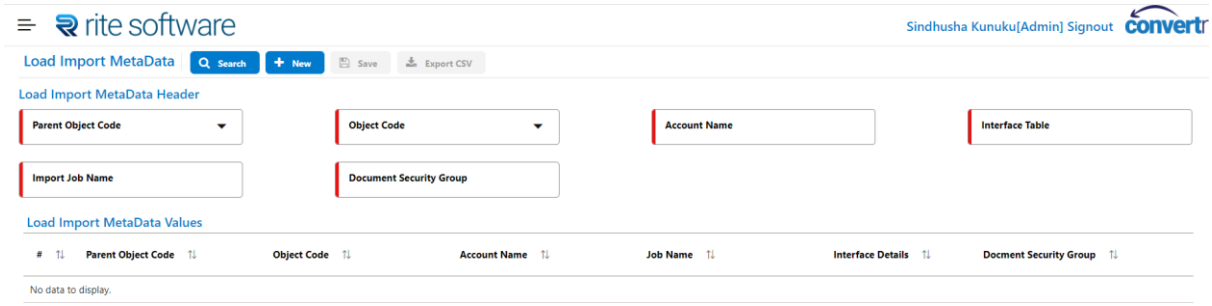


- Click on the transform to validate and convert.
- Once done, ConvertRite application needs to be connected to oracle fusion to run the jobs.
  - Re-Process option is used to re-validate only failed records after correcting the errors.
  - FBDI – File based data import- is the file generated after the 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:

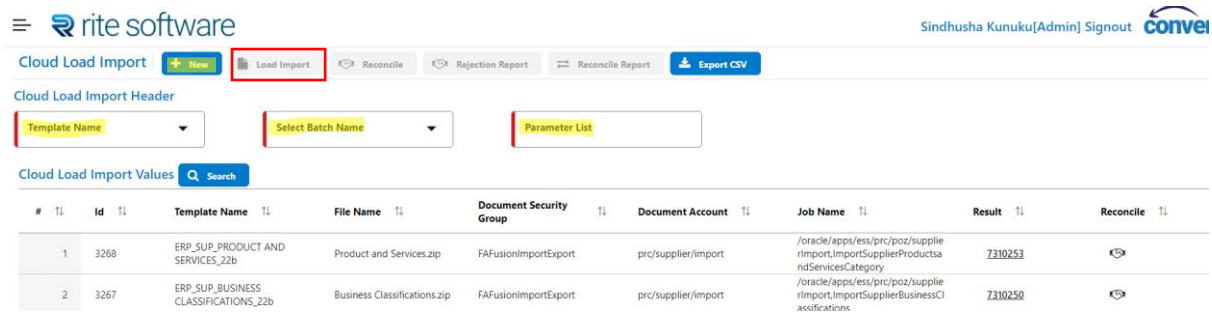
- So, click on the hamburger button-Go to the Master Data option under – Load Import Metadata – fill the information provided by the respective functional team – Save.



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.



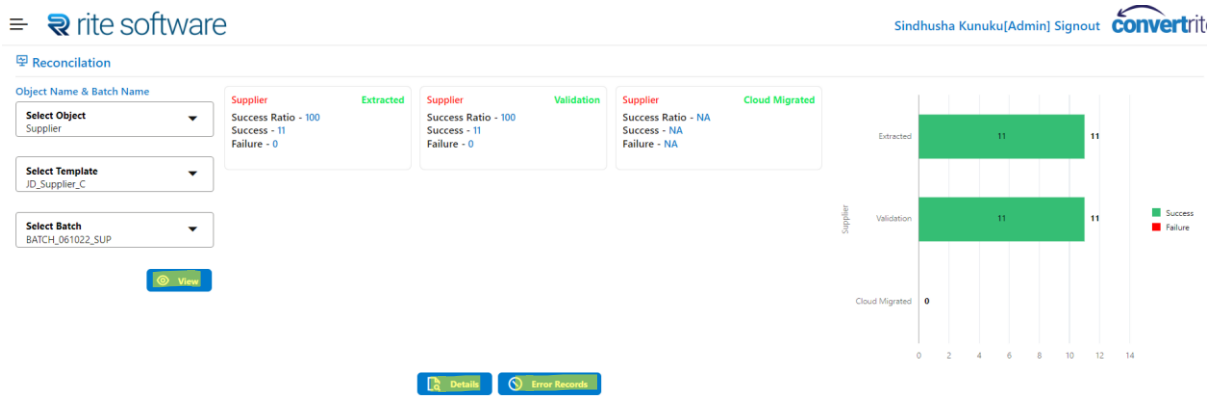
- Click on the Load Import – request will be submitted, and result ID should be generated.

- 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.



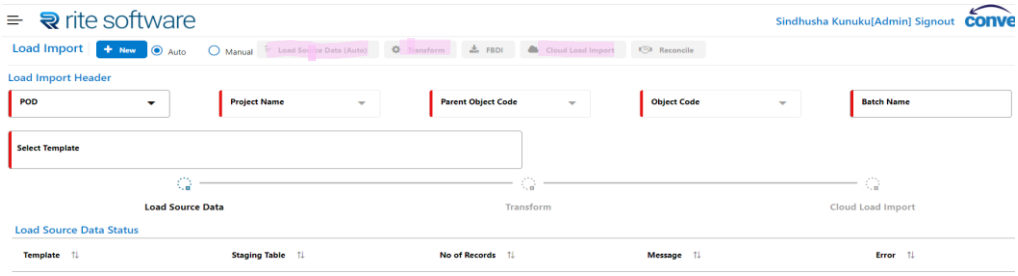
- We will get the results of source data extracted, validated and data migrated to the cloud.
- We can check error records and details.

Other Screens

Load Cockpit:

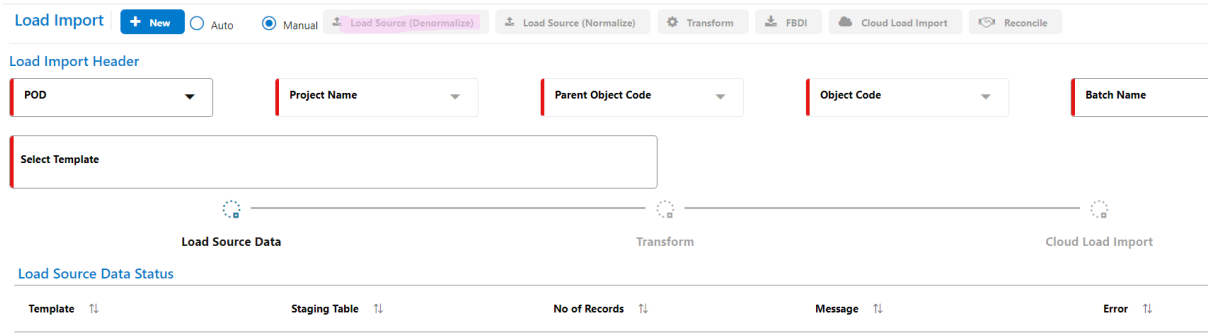
Let's say object and the flow is already created – to load the data- transform and cloud data loading for the same parent object with different child objects in the same screen.

- 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.

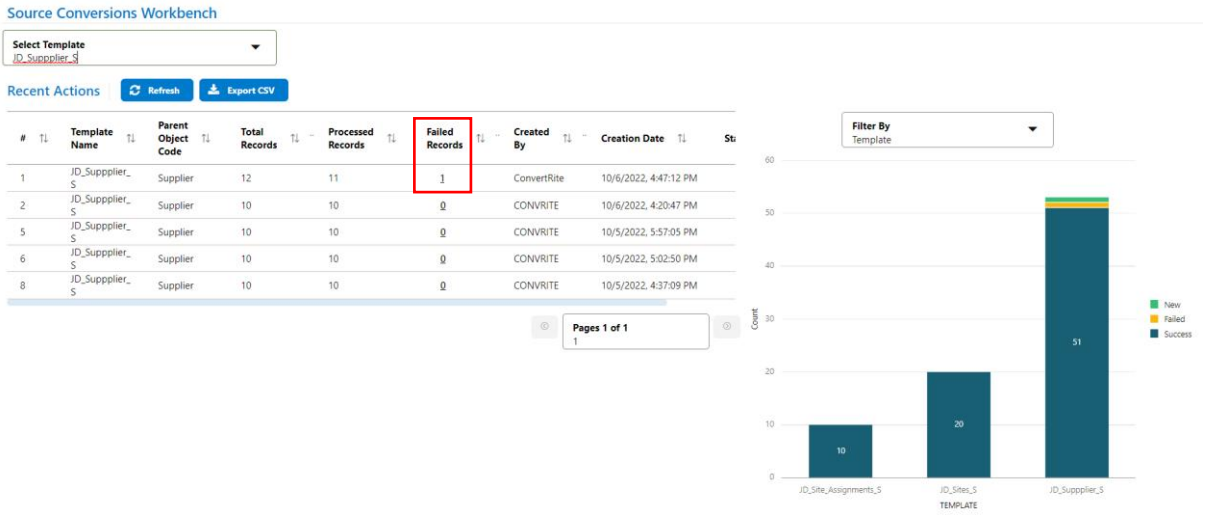
- Enter the Unique Batch Name.
- Click on the Transform to validate all mapping of Cloud Template Workbench screen.



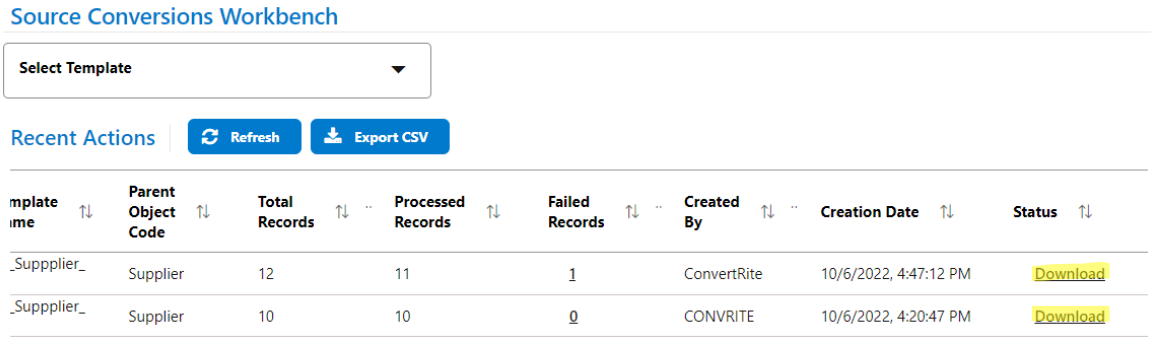
- If you want to upload file manually, choose manual radio button.
- If the file-based data is different for all the objects– then upload the file from Load Source (Denormalize) and if file based data is same for all the objects then File can be uploaded from load source (Normalise).

Source Conversions workbench:

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

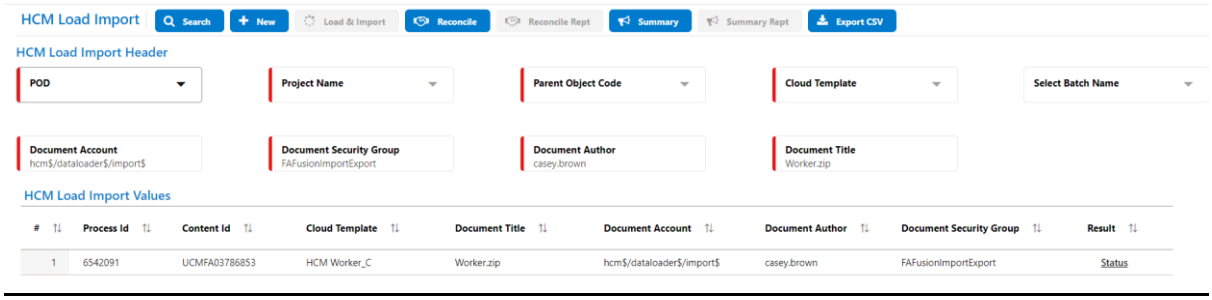


- In this screen we can check and access failed records when we are extracting/loading source data.
- Download option under status will be enabled only when we use external option to upload file in the source template workbench.



HCM Load Import:

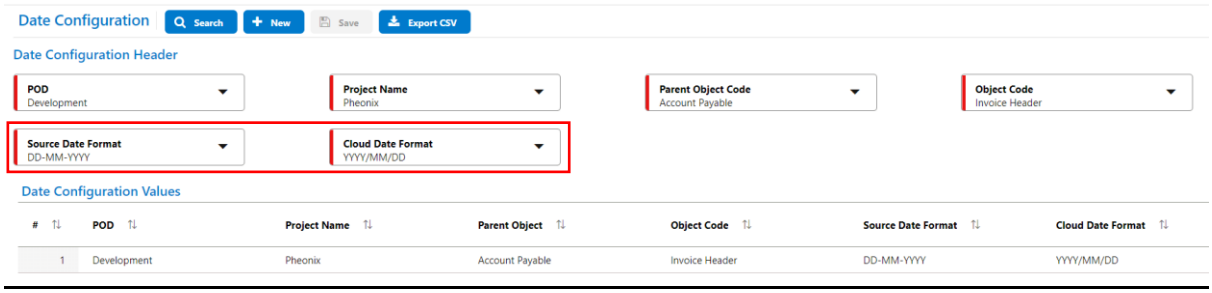
- Click on the hamburger button - ConvertRite – HCM Load import – New –fill all required details - Load and Import.



- 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:

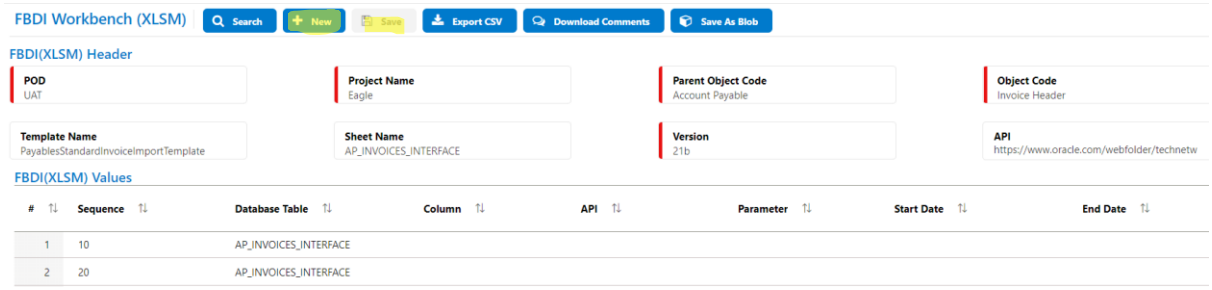
- Click on the hamburger button – Configuration – Date Configuration - New- Fill details- Save.



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

FBDI Workbench (XLSM):

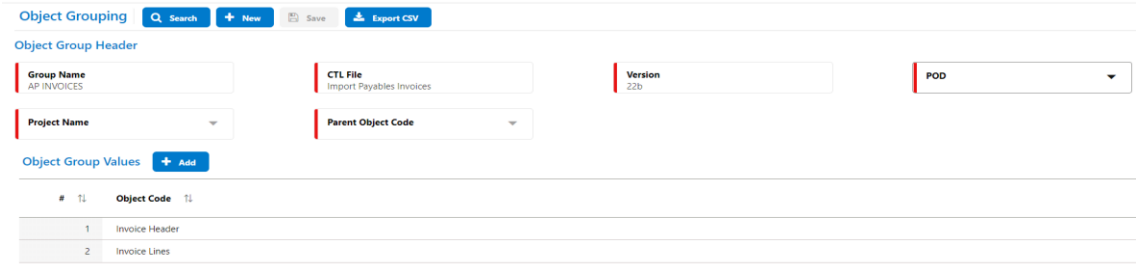
- Click on the hamburger button – Sequence Generator/Grouping – FBDI Workbench (Xlsm) -New – Save.



- FBDI Workbench (Xlsm) screen is used to generate sequence based on the xlsm 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:

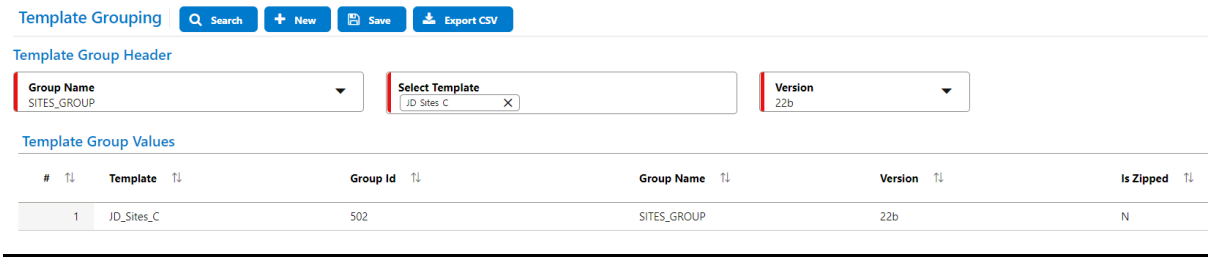
- Click on the hamburger button - Sequence Generator/Grouping – Object Grouping.
- Object grouping is used to group the objects based on Excel File of Cloud.



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

Template Grouping:

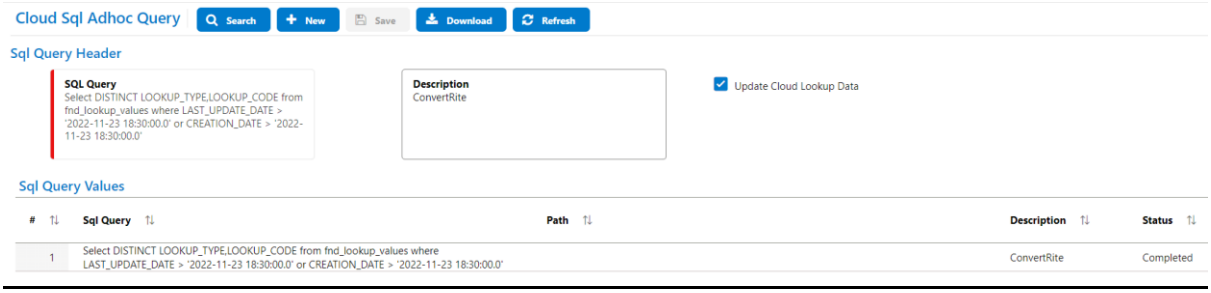
- Click on the hamburger button - Sequence Generator/Grouping –Template Grouping.



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

Cloud Sql Adhoc Query:

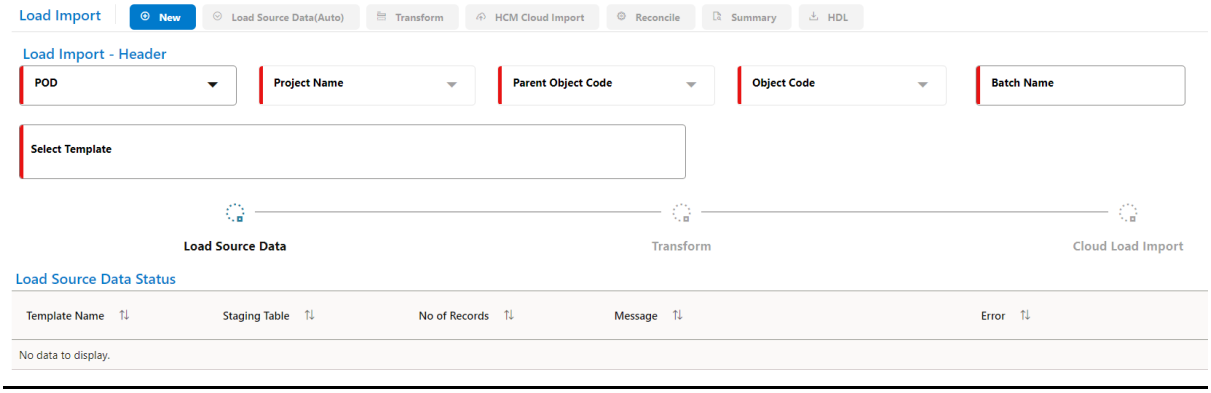
- Click on the hamburger button – Master data – Cloud SQL Adhoc Query –New – Write SQL query.



- 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:

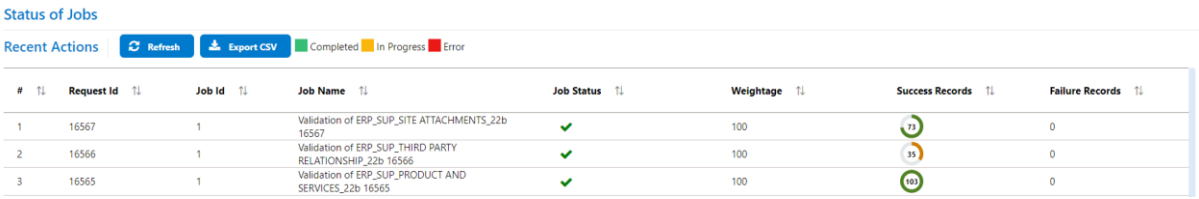
- Click on the hamburger button - Automation – Load Cockpit HCM – fill the required info – Load Source Data (Auto) – Transform – HCM Cloud Import.



- This screen is used to do the process in one screen for HCM object codes.

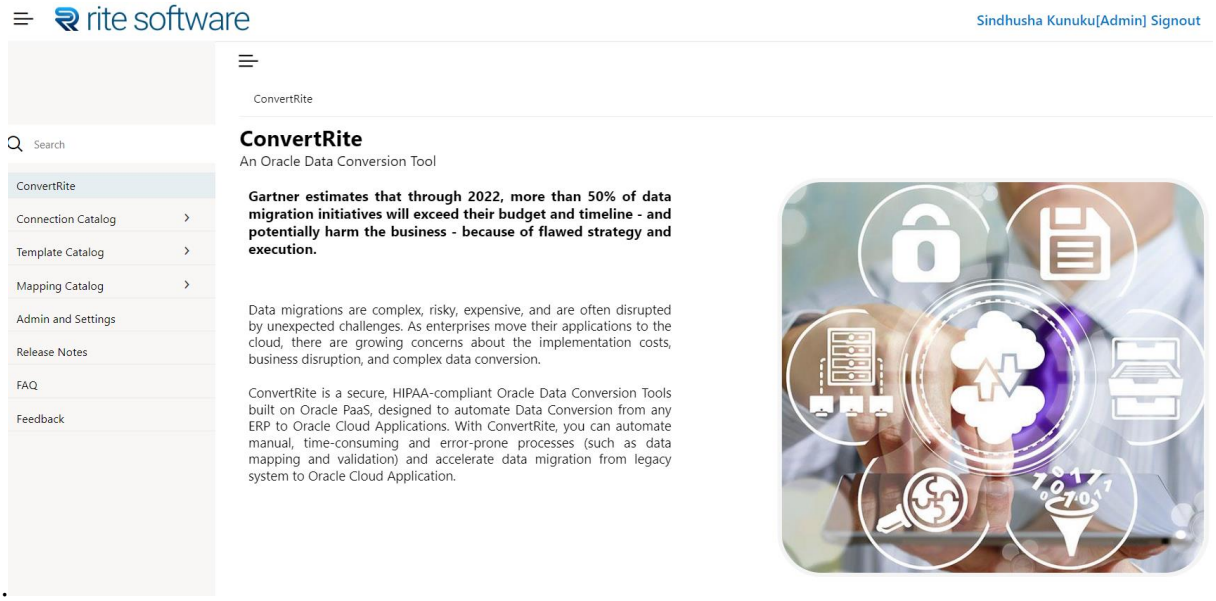
Status of Jobs:

- Click on the hamburger button -Dash Boards – Status of jobs.



Help:

- Click on the hamburger button – Dash Boards – Help.



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