

# Migrating from Nonproduction to Production Environments

## Oracle Sales Cloud

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## About This Document

This document supplements standard product documentation, which you are encouraged to review. To find documentation and other learning resources, such as guides, whitepapers, and videos, visit the [Oracle Help Center for Oracle Sales Cloud](#).





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## What We're Talking About

While working with Oracle Sales Cloud, you may need to move your data from one environment to another, that is from a source environment to a target environment. For example, consider the scenario when the application is initially provisioned - it is implemented in a nonproduction environment, thoroughly tested, and then deployed to a production environment.

This document describes the recommended migration processes and provides related tips and best practices, **focusing on the initial migration from a nonproduction to a production environment.**

### Notes:

- Unless otherwise stated, the term 'data' refers to your application configurations and customizations.
- This document assumes that you have complete information of the configurations and customizations made while implementing Oracle Sales Cloud in the source environment.

## Preparation Is Important, As Always!

You can't get away from it – preparation is critical. And we mean, you need to prepare *before* you start the migration.

### What have you changed?

The tools that you use for the migration are based on different areas in the user interface, where you and perhaps other implementers and administrators made changes. So, you need to know exactly what you've changed in the initially provisioned environment. As a best practice, you must record all the changes. If not, you must go through all functional areas in the product, such as Application Composer, and look for custom fields, custom objects, and so on.

### Why must you know where you made the changes?

The tools that Oracle includes for migration capture the data entered in a specific functional area of the product. To begin a migration, you must access the tools from the same functional area. (but why? – does it help retain the changes? Or is it that only the updated functional areas are migrated with the tool?)


### Do you need to update any test plans?

You may have already completed plans or scripts for testing your nonproduction environment. Generally, testing involves performing typical tasks done by each of your sales roles. Make sure that your plans adequately test the changes due to configurations and customizations, because you may need to perform the same tests in the target environment after completing migration.

### Are your environments ready?

Let's say that you're ready to migrate. Double-check the following:

- Review the [Getting Started with Your Sales Cloud Implementation](#) guide and finish setting up the tasks relevant to your business. The guide describes the sequence of steps required to set up an Oracle Sales Cloud implementation.
- As recommended in the guide, take advantage of the implementation projects. An implementation project serves as a launch pad for many of the core setup tasks, so you don't have to search for individual setup tasks or navigate to work areas, including scheduled processes. Using an implementation project makes it easier to keep track of the tasks you have used for setup and to migrate that data set from your source to target environment.

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- If it is the initial migration from your nonproduction to your production environment, ensure that the production environment is not customized – that is, it remains the initially provisioned environment with the default settings.
  - If it is *not* your initial migration and your production environment (target) has customizations that were manually re-keyed from another source, do one of the following:
    - Request an environment refresh. Note that this will overwrite all setup, customizations, and data on your nonproduction environment.
    - Re-provision the production environment from the same common ancestor that provisioned the source (nonproduction) environment.
  - Start by creating and verifying customizations or extensions in a sandbox on your nonproduction environment.
  - Publish the sandboxes containing the customizations that you want to export. Only published customizations are captured in an export.
  - Both the source and target environments must be on the same release and update or patch bundle. Schedule the migration for when your source and target environments are on the same release and update patch bundle.
  - Ensure both the source and target environments are synchronized, that is they contain identical Role Names and Role Codes.
    - Note that with Release 12, if you customized standard roles or privileges delivered with the product, Oracle preserved those customizations by creating autocopied. The process might have created different roles, if the same customizations weren't applied to the roles in both environments. To resolve this issue, follow the instructions in [Oracle Sales Cloud: Customization Set Migration Failure due to Role Mismatch](#) (Doc ID 2242301.1).

#### **Have you notified your users?**

- Make sure that no one is publishing customizations during the export process.
- When importing into your target environment, make sure that users are logged off of the environment.

#### **Do you have the appropriate roles?**

To migrate data, you must have the following roles:

- Application Implementation Consultant: Granted to initially provisioned user
- IT Security Manager: Granted to initially provisioned user
- Application Diagnostic Administrator: Granted to initially provisioned user
- Sales Administrator: If initial user is performing the migration, assign this role to the user
- Custom Objects Administrations: If initial user is performing the migration, add this role to the user
- Employee Abstract: If initial user is performing the migration, add this role to the user
- Sales Analyst for Sales Prediction (if you're using Sales Predictor): If initial user is performing the migration, add this role to the user

## Before You Begin

- If you created content using the Oracle Business Intelligence Enterprise Edition features and are using the Customization Set Migration (CSM) tool to migrate the content, then perform the following step:
  - Go to the Manage Administrator Profile Options task and ensure that the **Business Intelligence in Configuration Set Migration Disabled (FND\_CSM\_BI\_DISABLE)** option is set to **No** in both the source and target environments.
- Ensure that you have enabled the Sales offering in the target environment.

## Migration Overview

Oracle Sales Cloud includes a series of tools to migrate a high percentage of your data. These tools are available for certain functional areas in the application user interface. With a few clicks, you can start the export of data from the functional area in the source environment. Similarly, from the corresponding page in the target environment, you can import the data into the target environment.

Leverage these tools to minimize your effort when performing migrations.

**Disclaimer:** This is a general list of functional areas to consider for your migration. Pick the areas that apply to your implementation and include additional ones, if necessary.

## Setup Data Migration – TOOL

The setup data migration tool captures much of the data on your Setup and Maintenance pages. It collects the configurations and migrates them by exporting or importing your offering or implementation project in a configuration package. If you followed the best practice of using an implementation project, your migration step will be easier.

**Note:** With this tool, you can select specific configurations for export or import, if you prefer to limit what is captured in the migration. Our recommendation is to exclude Lookups and menu customizations, and instead, use the [Customization Set Migration](#) tool to capture them.

After using the tool and migrating the data, you must manually set up the areas that were excluded from the configuration package. The excluded setup data falls into the following categories:

### 1. Scheduled Processes

You need to set up all scheduled processes (ESS jobs) manually in your target environment. For example, you might need to set up these jobs for Forecasting:

- Run Refresh Forecast Process
- Run Refresh Forecast Items Process
- Run Compress Forecast Metrics Process
- Run Due Date Check Process
- Run Refresh Revenue Metrics Process

The table in this section shows some commonly set scheduled processes, but not all you might need to set.

### 2. Manage File Import Activities

As part of the import process, you create and activate a file import activity. File import activities that you set up in your source environment cannot be migrated. You must set them up manually as you progress through your import of users, accounts, contacts, and so on.

### 3. Core setup tasks (highlighted in red)

Manually set up the tasks shown in the Setup Tasks table (highlighted in red), if applicable to your implementation.

Use the following table to understand which setup tasks are included and excluded in the configuration package generated from the Setup and Maintenance page.

#### SETUP TASKS

Functional Area	Task	Migrated with tool if selected?
Create Company Profile	Manage Enterprise HCM Information	Yes, but value is set by Oracle when environment is provisioned.
	Manage Legal Addresses	Yes, but value is set by Oracle when environment is provisioned.
	Manage Legal Entity HCM Information	Yes, but value is set by Oracle when environment is provisioned.
	Manage Business Unit	Yes, but value is set by Oracle when environment is provisioned.
	Manage Common CRM Business Unit Profile Options	Yes, but value is set by Oracle when environment is provisioned.
Create Setup Users	Manage Job	Yes
	Manage HCM Role Provisioning Rules	No Predefined role mappings should already exist in your production environment as part of the provisioning process. However, if you have set up additional custom role mappings, you must manually set them up in the target environment.
	Manage Users	No See the <a href="#">Users Migration – TOOL</a> section in this document.
Set Up Accounting Calendar	Manage Accounting Calendars	Yes
	Refresh Denormalized Time Dimension Table for BI	No
Configure Corporate Currency	Manage Currencies	Yes if using the initial value of USD. If this is changed to another currency, then you will have to manually update the new value in the production environment.
Set Up Geography Data	Manage Geographies	No See the <a href="#">Territory Migration – TOOL</a> section in this document.
Configure Search	Synchronize Database Search Indexes for CRM Objects	No

Functional Area	Task	Migrated with tool if selected?
	Optimize Database Search Indexes for CRM Objects	No
	Manage Search View Objects	No
Create Sales Users	Manage Resource Roles	Yes
	Manage Internal Resource Organizations	No
	Manage Resource Organization Hierarchies	No
	Manage HCM Role Provisioning Rules	No Predefined role mappings should already exist in your production environment as part of the provisioning process. However, if you have set up additional custom role mappings, you must manually set them up in the target environment.
	Manage File Import Mappings	Yes Note that this applies to all custom mappings you set up across all objects, not just those for users. Therefore, select it if you have any custom mappings for any objects.
Create Sales Catalog	Manage Product Groups	Yes
	Manage Product Group Usage	Yes
	Refresh Denormalized Product Catalog Table for BI	No Applicable if using territories.
	Browse Sales Catalog in Opportunities Enabled	No Applicable if you want to enable browsing of the sales catalog while editing opportunities.
	Manage File Import Mappings	Yes
Import Accounts and Contacts	Manage Trading Community Source Systems	Yes
	Schedule Export Processes	No
	Manage Classification Categories	Yes
	Manage File Import Mappings	Yes
Configure Opportunities	Manage Sales Methods and Sales Stages	Yes
	Refresh Denormalized Product Catalog Table for BI	No
Create Competitors	Create Competitors	No
Set Up Oracle Social Network	Manage Oracle Social Network Objects	No You need to enable and synchronize OSN objects after migration.
Set Up Sales Territories and Assignment	Manage Territory Geographies	Yes
	Enable Dimensions and Metrics	No



Functional Area	Task	Migrated with tool if selected?
	Manage Territory Proposals	No See the Territory Migration – TOOL section in this document.
	Request Account Assignments	No
	Request Revenue Territory Based Assignment	No
	Define Default Proposal Owner	No If you want to change the default proposal owner to another resource, manually change the value in the target environment.
Set Up Sales Quotas	Manage Sales Quota Seasonality Groups	No
	Manage Sales Goals	No This data is not set up through the Setup and Maintenance pages, but rather through the Navigator and Quota Management page. You must set it up manually in your target environment.
	Manage Sales Quota Plans	No
	Synchronize Quotas	No
Define Sales Forecasting Configuration	Select Forecasting Options	Yes except for one manual step: You must click the Submit button on this page in the target environment after the migration.
	Manage Standard Lookups	Deselect Lookups to exclude them from the setup migration. Instead, run the <a href="#">Customization Set Migration</a> tool to migrate Lookups.
	Manage Sales Forecasting Schedulable Processes	No

#### To manually configure setup data:

Go to each setup task listed in the table, and change the settings to match those in your source environment.

For information on how to export and import setup data, review the following resources:

- [Performing Offering-Based Exports](#): Watch the video for the steps to export your setup tasks. It also shows how to monitor the progress of the export. Note that though it applies to incremental migrations, the information is also relevant for your initial migration.
- [Performing Offering-Based Imports](#): Watch the video for the steps to import your setup tasks. It also shows how to monitor the progress of the import.
- [Specifying Offering-Based Import Options](#): Watch the video to see how to identify data discrepancies when importing setup data.
- [Understanding Setup Tasks](#) topic in the Implementing Sales guide.

## Custom Data Migration – TOOL

The Customization Set Migration (CSM) tool captures most of your customizations and extensions, including custom objects, custom fields, Lookup values, workflows, server scripts, relationships, page layouts, display label changes, and so on. After using the tool to migrate the data, you must manually set up a few areas that are excluded from the configuration package.

When you use this tool, you can select the types of customizations to include in your migration set on the Create Customization Set page on the Outgoing tab, with a few exceptions. Refer to the [Configuration Set Migration - Selectively Migrate Customization Types](#) document for more information about how to make these selections.

The following table lists the areas that are included or excluded using the CSM migration tool.

### CUSTOMIZATIONS AND EXTENSIONS

Functional Area	Customization	Included in the tool?
Application Composer	Custom object	Yes, includes initial security settings done in Application Composer.
	Custom fields	Yes
	Page layouts	Yes
	Groovy script	Yes, but this is written exactly the way that it was in your nonproduction (source) environment, so you might need to update the values for your production environment, such as URLs that point to the nonproduction environment.
	Object artifacts that were generated from the Import and Export page in Application Composer to make extensions available for importing and exporting	No
	User names and passwords for secured SOAP web service connections	No
	Enabled attachment feature for custom objects	No
Page Composer	All are included.	Yes
Appearance page	All are included.	Yes
Structure page	All are included.	Yes
User Interface Text page	All are included.	Yes
Page Integration Wizard page	All are included.	Yes
Applications Core Setup application	Messages	Yes
	Lookups	Yes
	Descriptive, extensible, flexfields, and value sets	Yes
	Attachment categories and entities	Yes
Scheduled Processes		No
Manage Oracle Social Network Objects task	All customizations done through this setup task	Yes

Functional Area	Customization	Included in the tool?
Business Processes		No
Incentive Compensation customizations		No
Authorization Policy Manager (APM)	Changes to enterprise roles, new duty roles, and role hierarchy changes made in APM	No
Personalizations		No
Code extensions implemented in Oracle JDeveloper using the applications developer role		No
Menu customizations		Yes except for deletions.
Mobile Application Designer (NEW in R12)		No
Announcements		No
Alerts		No
Developer Connect		No
Custom Subject Areas		Yes
Oracle Business Intelligence Enterprise Edition	Customizations made through: Oracle Business Intelligence Answers Oracle Business Intelligence Delivers Business Intelligence Composer Oracle Business Intelligence Interactive Dashboards Oracle Business Intelligence reports	Yes
Email templates		Yes
Marketing Source Code > Review Marketing Source Code		No
Sales Predictor rules		No
Oracle Sales Cloud for Outlook	Started with the seeded package and made changes through Application Composer	Yes

To use the CSM tool, review these resources:

- [Customization Migration Enhancement](#) video
- [Moving Customizations](#) topic in the Customizing Sales guide

## Users Migration – TOOL

You can export and import user details, such as party and resource data including user and hierarchy information. For instructions, see the [Importing Users from a File](#) topic in the Getting Started with Your Sales Cloud guide.

## Transactional Data Migration – TOOL

You can export or import your transactional data, object by object, or re-import the original files you used in your nonproduction environment, such as:

- Accounts
- Contacts
- Opportunities
- Leads
- Product Groups

For details, see the [Understanding File-Based Data Import and Export](#) guide.

## Territory Migration – TOOL

**IMPORTANT:** Before you export or import your territory definition, you must load your geography data in the target environment, just as you did in your source environment. For instructions, see the [Setting Up Geography Data](#) topic in the Getting Started with your Sales Cloud Implementation guide.

You can export or import your territory definition using either of the following two flows from the Territory Management pages. The import and export Action menu options create proposals in the target environment:

- Export > Export to Another Environment
- Export > Export Selected Territory Hierarchy
- Import to Proposal > Import from Another Environment
- Import to Proposal > Import Territories

Importing or exporting from an environment creates a proposal that, if activated, will create a territory hierarchy identical to the one in your source environment. This means that if you have territories in the target environment but not in the source, those will be deleted.

If you export from a proposal and you import, then the import flow will check if that proposal already exists in the target environment. If it does, the changes are added to the existing proposal. If it doesn't, a proposal with the same name as in the import file is created.


For more information, see [Exporting and Importing Territory Definitions](#) (Doc ID 1907990.1) in My Oracle Support.

**REMINDER:** If you want to change the default territory proposal to another resource, modify the profile option in your target environment. In the Setup and Maintenance work area, use the **Define Default Proposal Owner** task in the Sales offering to set the default territory proposal.

## Manually Performed Tasks

If applicable to your implementation, perform the following manual tasks in your target environment:

- Set up the data that wasn't captured in the tool. See the table in [Setup Data Migration – TOOL](#).

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- REMINDER: In the Select Forecasting Options task, click the **Submit** button in the target environment after the migration.
  - Customizations and extensions that weren't captured in the tool. See the table in [Custom Data Migration – TOOL](#).
  - Security customizations: In your target environment, you must manually replicate all Security customizations that were not made using the Application Composer, such as custom roles or custom policies. For more information, see the [Customizing Security](#) topic in the Securing Oracle Sales Cloud guide.
  - Web service credentials
  - Oracle Sales Cloud for Outlook: If you have created a custom Outlook package on your nonproduction environment, then it needs to be manually copied over to the production environment.
  - SSO setup

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