

Oracle

Applications Cloud

Using Functional Setup Manager

Release 12

This guide also applies to on-premises implementations

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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon  to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon  in the global header. Not all pages have help icons. You can also access Oracle Applications Help at <https://fusionhelp.oracle.com>.

Using Applications Help

 **Watch:** This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use [Oracle Applications Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the [Oracle Help Center](#) to find guides and videos.
- **Training:** Take courses on Oracle Cloud from [Oracle University](#).

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1 Overview

Setup and Maintenance: Overview

Oracle Functional Setup Manager enables rapid and efficient planning, configuration, implementation, deployment, and ongoing maintenance of Oracle Applications through self-service administration.

All Oracle Functional Setup Manager functionality is available from the Setup and Maintenance work area, which offers you the following benefits:

- **Self-Service Administration:**

Manage all aspects of functional setup of Oracle Fusion applications at the business user level with an integrated, guided process for planning, configuration, implementation, deployment, and maintenance.

- **Configurable and Extensible:**

Configure and Extend prepackaged list of tasks for setting up Oracle Fusion applications to better fit your business requirements.

- **Complete Transparency:**

Get full visibility of Oracle Fusion applications end-to-end setup requirements with auto-generated, sequential task lists that include prerequisites and address dependencies.

- **Prepackaged Lists of Implementation Tasks:**

Task lists can be easily configured and extended to better fit with business requirements. Autogenerated, sequential task lists include prerequisites and address dependencies to give full visibility to end-to-end setup requirements of Oracle Applications.

- **Rapid Start:**

Specific implementations can become templates to facilitate reuse and rapid-start for comparable Oracle Applications across many instances.

- **Comprehensive Reporting:**

A set of built-in reports helps to analyze, validate and audit configurations, implementations, and setup data of Oracle Applications.

With Oracle Functional Setup Manager you can:

- Learn about and analyze implementation requirements.
- Configure Oracle Applications to match your business needs.
- Achieve complete visibility to set up requirements through guided, sequential task lists downloadable into Excel for project planning.
- Enter setup data through easy-to-use user interfaces available directly from the task lists.
- Export and import data from one instance to another for rapid setup.
- Validate setup by reviewing setup data reports.
- Implement all Oracle Applications through a standard and consistent process.

Who Will Use the Setup and Maintenance Work Area: Points to Consider

Primarily three types of business application users make use of Oracle Fusion Functional Setup Manager through the Setup and Maintenance work area.

Implementation Project Manager

Implementation project managers are typically responsible for the overall implementation of an Oracle Fusion application. They research and analyze the functionality of Fusion offerings and match them to the business requirements of the implementation. They also determine what setup tasks can be performed and who performs them to make an Oracle Fusion application ready for transactional processing.

Functional User

Functional users are representatives from various lines of business of a company and are subject matter experts in their functional areas. They are the financial administrators, procurement managers, sales operations representatives, and benefits administrators. Typically, they are responsible for entering setup data and then verifying that the applications are working correctly for the transactional processes.

System Administrator

System administrators typically come with technical background and are responsible for software installation, systems configuration, and data migration. The export and import of setup data is usually performed by system administrators.

2 Managing an Application Implementation

Offering Components: How They Work Together

Offerings: Explained

Offerings are application solution sets representing one or more business processes and activities that you typically provision and implement as a unit. They are, therefore, the primary drivers of functional setup of Oracle Fusion applications. Some of the examples of offerings are Financials, Procurement, Sales, Marketing, Order Orchestration, and Workforce Deployment. An offering is the highest level grouping of Oracle Fusion Applications functionality. They include functional areas, and alternative business rules known as features.

Functional Areas: Explained

A functional area is a grouping of functionality within an offering. It may be an optional piece of functionality that you may want to implement as part of an offering. Optional functional areas can be included or excluded from their parent offering. Functional areas may be hierarchical, and therefore may be subordinate to another functional area. An offering has at least one base or core functional area and may have one or more optional functional areas. Additionally, one or more features may be associated to an offering. Base functional areas indicate the core functionality that you need to implement for the offering to be operational. Optional functional areas indicate optional functionality that you may or may not implement for an offering.

Common Functional Areas

Some core functionality essential to an offering such as setting the Initial Users or the Legal Structures may be shared across offerings. These are known as common functional areas and appear across offerings. Although most of the tasks associated to a common functional area are the same regardless of the offering you implement, there may be some offering-specific tasks.

In general once you implement a common functional area for a given offering, you won't need to repeat its implementation for the remaining offerings, however, it's recommended you check if there is any offering specific tasks that may still require your attention.

Base and Optional Functional Areas

Functional areas that support core functionality for an offering are known as base functional areas and must be implemented in order for the offering to be operational. Other functional areas known as optional functional areas support processes or functionality that can be implemented at your discretion depending on the business requirements. These can be implemented later during the implementation process.

Features: Explained

Offerings include optional or alternative business rules or methods called feature choices, used to fine-tune business processes and activities supported by an offering or a functional area. You make feature selections according to your

business requirements to get the best fit with the offering. If the selected offerings and functional areas have dependent features then those features are applicable when you implement the corresponding offering or functional area.

Feature choices can be one of three different types:

Yes or No

If a feature can either be applicable or not be applicable to an implementation, a single check box is presented for selection. Check or deselect to specify yes or no respectively.

Single Select

If a feature has multiple choices but only one can be applicable to an implementation, multiple choices are presented as radio buttons. You can turn on only one of those choices.

Multi-Select

If the feature has multiple choices but one or more can be applicable to an implementation then all choices are presented with a check box. Select all that apply by checking the appropriate choices.

Implementation Task Lists: Explained

The configuration of the offerings determine how the list of setup tasks is generated during the implementation phase. Only the setup tasks needed to implement the selected offerings, functional areas and features are included in the task list. This gives you the targeted task list necessary to meet your implementation requirements.

Implementation Process: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These correspond to the offerings and their functional areas.

Plan

Identify what business process you want to implement and learn about the offerings that support such business processes.

Configure

Enable the offerings, functional areas and features that best fit your requirements.

Implement

Perform the tasks to set up the applications that support your business processes. Typically you implement them in a test or development environment and certifying them before changing or moving them to production.

Export and Import

Move your implementation across environments such as from development environment to the production environment once you are satisfied with the results of your implementation.

Transact

Use your applications to perform all transactions.

Maintain

Make setup modifications to your applications behavior to adapt to your business requirement changes.

Planning your Implementation

Planning your Implementation: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These correspond to the offerings and their functional areas you want to implement. First review all relevant documentation for your offering and prepare the data you need to configure it correctly according to your business requirements. Functional Setup Manager provides you all relevant documentation you may need to understand the Fusion Application Offerings and identify what applications need to be deployed for the offering to work properly.

Offering Related Documents: Explained

Related documents are intended to help you plan a successful implementation of the offerings available on the Getting Started page. Every offering contains a default set of reports as related documents. You cannot modify the default documents. In addition to these reports, you can add custom reports and other related documents to help with planning and implementation or when performing setup tasks. The documents available by default are:

Offering Content Guide

This report shows detailed information on the business processes and activities supported by the offering.

Setup Task Lists and Tasks Report

This report shows the list of task lists and tasks that you should complete to successfully implement the offering.

Associated Features Report

This report shows the list of functional areas and features associated with the offering.

Related Business Objects Report

This report shows all setup data needed to implement the offering. It provides a list of all business objects that are associated with the setup tasks belonging to the offering.

Related Enterprise Applications Report

This report shows the list of enterprise applications used by the functional pages and web services for the offering.

Configuring Offerings: Explained

You must configure the offerings and functional areas that support the activities your organization or company performs. Offerings are the starting points for configuration decisions.

Provisioned Offerings

Before an offering can be configured, make sure that it has been provisioned. While you are not prevented from configuring offerings that have not been provisioned, ultimately the users are not able to perform the tasks needed to enter setup data for those offerings until appropriate enterprise applications, or Java EE applications, are provisioned and their location, or endpoint URLs, is registered. Provisioned offerings are identified in Functional Setup Manager application under the Provisioned column of the Configure Offerings page. A warning message appears if you attempt to enable an offering or functional area for implementation that is not provisioned.

Enabling Offerings

Offerings and their functional areas are presented in an expandable and collapsible hierarchy to facilitate progressive decision making when specifying whether or not an enterprise plans to implement them. An offering or its functional areas can either be selected or not be selected for implementation. Implementation managers will first decide which offerings to enable for implementation. Although all the base functional areas of an offering are automatically enabled for implementation when its parent offering is enabled for implementation, users have the choice to decide what of the optional functional areas are enabled for implementation.

Configuring Feature Choices

If feature choices are available for the offering or functional areas, make the appropriate selections to meet your business requirements. In general, the features are set with a default configuration based on their typical usage in most implementations. However, you should always review the available feature choices for the selected offerings and functional areas and configure them as appropriate for the implementation. Dependent features appear visible when the feature choice they depend on is selected for implementation by user.

Implementation Status

You can manually track the implementation status of the offerings and functional areas enabled for implementation. To do so, edit the current implementation status of the offering or functional area in the Configure Offerings page and change it appropriately.

Enabling Offerings: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These decisions determine the offerings and functional areas you want to implement. You then configure the offerings and functional areas that support the activities your organization or company performs. During the configuration process, you specifically enable offerings and functional areas for use before you implement them.

Enabling Offerings and Functional Areas

Use the Setup and Maintenance work area to help decide which offerings to enable for implementation. Once you decide to use an offering, you can select the Configure button to choose the configuration details and enable the offering, associated functional areas, and features. All the base functional areas of an offering are automatically enabled for implementation when you enable the parent offering. You choose which optional functional areas to enable. The functional areas appear in an expandable and collapsible hierarchy to facilitate progressive decision making for implementation.

Enabling Features

Features are optional or alternative business rules or methods used to fine-tune business processes and activities supported by an offering or a functional area. If features are available for the offering or functional areas, you can enable them to help meet your business requirements, if desired. In general, the features are set with a default configuration based on their typical usage in most implementations. You should always review the available features for the offering and functional areas and select them as appropriate. Dependent features appear visible when the feature choice they depend on is selected for implementation.

Enabling Offerings: Procedure

You enable offerings to customize the functionality that matches the services you plan on implementing.

Enabling Offerings

To enable offerings, follow these steps.

1. Open the Setup and Maintenance work area (**Navigator > Setup and Maintenance**).
2. In the Setup and Maintenance Offerings page, select the offering you're using, then click **Configure**.
3. In the Configure page, select the **Enable** check box for the offering. Also select the **Enable** check box for each of the functional areas you want to use.
4. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
5. Select **Done** to return to the Offerings page then repeat the same steps for each of the offerings you are using.

Implementing Offerings: Explained

Once you have configured the offering you want to implement, you can start performing the appropriate task to setting your applications up to support your business processes. Functional Setup Manager provides two methods to set up the offerings and therefore applications depending on your business needs.

Offering based implementation

Following a predefined list of tasks required for the features you selected to implement. This method enables you to implement the functionality on an adopt-as-you-go based approach. It provides you direct access to the setup tasks saving you time as by default gives you visibility to the minimum requirements for your implementation. This is always the recommended method to implement your applications unless you require custom implementation task lists.

Project based implementation

Enables you to customize your implementation defining an implementation project with a tailored list of tasks, task assignment and implementation progress monitoring. Use of this method is recommended when you require a custom task list.

Offering Based Implementation: Explained


You can use the Setup and Maintenance work area to directly implement an entire offering or functional areas within an offering. You do not need to create an implementation project, and instead use a modular approach to your implementation. You can complete setup of specific business areas quickly to start transactions, and then gradually adopt more and more application functionality as needed.

An offering or functional area-based approach means you set up various parts of an offering at different times. You can start with set up of the functional areas that you immediately need to adopt. Over time, you can continue to set up other functional areas as you start to adopt additional applications functionality. Offerings must be enabled for implementation in order for their functional areas to display. Offering or functional area-based implementation provides the following advantages:

- When you select an offering the relevant functional areas appear for selection. The common functional areas are those shared across offerings and are listed first. The functional areas that are only associated with the selected offering, are at the bottom of the list.
- A functional area usually has several setup tasks, but only a few of them require input before the application function is ready for transactions. The rest of the setup tasks are usually optional or have predefined default values based on common use cases. When you select a functional area for implementation, you can view just the required tasks, or you can view the full list of setup tasks for the functional area.

Executing Setup Tasks

You select the functional area you want to implement and the list of tasks that you need to perform appears. The tasks are organized with prerequisites and dependencies in mind. Select the task for which you want to enter data and then click Go to Task to render the page where you perform the task. If the setup data entered through a task can be segmented by a specific attribute, and therefore could be performed iteratively for each qualifying value, then the task may benefit from scope. Typical examples include tasks relevant to legal entities, business units, ledgers, tax regimes, and legislative data roles. For such tasks, you are prompted to pick a scope value before entering data. You can pick a scope value that was previously selected, select a new scope value, or create a new scope value and then select it. The selected value is a qualifying attribute of the setup data entered by way of the task, and therefore, different setup data can be entered for different scope values. Enter data as appropriate and once you finish, close the page and you return to the functional area list of tasks.

 **Note:** You cannot perform a task if you do not have the proper security entitlement.

Project Based Implementation

Project Based Implementation: Explained

You can create implementation projects to manage the implementation of an offering and functional areas as a unit throughout the implementation life cycle, or maintain the setup of specific business processes and activities customizing the list of tasks to complete their implementation.

An implementation project is the list of setup tasks you need to complete to implement selected offerings and functional areas. You create a project either by:

- selecting an offering and its functional areas you want to implement together, then customize the list of tasks for such offering and functional areas as applicable.
- selecting specific setup task lists and tasks you require for a specific configuration.

You can also assign these tasks to users and track their completion using the included project management tools.

Selecting Offerings

When creating an implementation project you see the list of offerings and functional areas that are configured for implementation. Implementation managers specify which of those offerings and functional areas to include in an implementation project. It is strongly recommended that you limit your selection to one offering per implementation project, even though the application does not prevent you from including more than one. The implementation manager should decide based on how they plan to manage their implementations. For example, if you implement and deploy different offerings at different times, then having separate implementation projects help to manage the implementation life cycles. Furthermore, the more offerings you included in an implementation project, the bigger the generated task list is. This is because the implementation task list includes all setup tasks needed to implement all included offerings. Alternatively, segmenting into multiple implementation projects makes the process easier to manage and ensures that import and export sequence of the project data is straightforward in the correct sequence.

Implementation Project Task Lists: Explained

Once you make offering and functional area selections, Oracle Fusion Functional Setup Manager creates the implementation project and generates a complete list of setup tasks based upon your selections. The predefined hierarchical task list added when you select an offering is called the offering top task list. It includes a complete list of all tasks, including the prerequisites required to implement the offering. Typically, this task list has the same name as the name of the offering it represents. If multiple offerings are included in a single implementation project, then each one of the offering top task lists shows as a top node in the implementation task list hierarchy.

Included Tasks

Tasks used to set up any of the dependent functional areas and features, which are not selected for implementation are excluded from the task list. The implementation task list is generated according to the offering configurations and top task list definitions present at the time an implementation project is created. Once created, the task list in the implementation project becomes self-contained and does not change based on any changes made to the offering configurations or top task list definitions.

Task Organization

The offering top task list shows as the top node in the implementation task list hierarchy. If multiple offerings are included in a single implementation project then top task list of each of the offerings becomes a top node of the implementation task list hierarchy. Within each top node, the tasks are organized with prerequisites and dependencies in mind.

- The most common requirements across all offerings are listed first.
- Next, the common tasks across an application area (such as Customer Relationship Management, or Financials), if applicable, are shown.
- Next, tasks that are common across multiple modules and options within an offering display.
- Finally, tasks for specific business areas of the offering, such as Opportunity Management, Lead Management, Territory Management, or Sales Forecasting display.

Predecessor Tasks

Some setup data may be a prerequisite for other setup data. The tasks that involve entering the prerequisite data may be identified as predecessor tasks.


In an assigned task list a task with predecessors is indicated as such, and provides you the following information:

- Which tasks are the predecessors of a given task.
- The status of the predecessor tasks.
- The recommended status of the predecessor tasks before performing the given task.

Predecessor tasks are identified to give you better understanding of the data dependency, but you are not prohibited from performing the task even if the predecessor task status is not in the recommended state. Different implementations may select to implement the offerings in different orders. A predecessor task may also be a common task for many different offerings. If a predecessor task was performed as part of a previous implementation and setup data was entered, then you may be able to proceed with the dependent tasks without performing the predecessor tasks in the current implementation. The predecessor and the dependent tasks might be performed in parallel by entering certain values of predecessor first and then followed by entering the data that is dependent on the already entered parent data, and then repeating the process for each step of the data dependency.

Executing Setup Tasks: Explained

You enter setup data directly from the list of tasks in the Setup and Maintenance work area. You locate the task that you want to enter data for and click the corresponding button. This enables navigation to the page where you perform the task. The page for managing setup data for the task then appears, where you enter data as appropriate. Once you finish entering data and close the page, you return to the list of assigned implementation tasks. If an assigned setup task only uses a web service for managing its data, the web service executes when you perform the task.


 **Note:** You cannot perform a task if you do not have the proper security entitlement.

You can add a file, URL, or text as notes to an assigned task. These notes are accessible not only to you, but also to the implementation manager. All users assigned to the task can see the notes.

Assigning Setup Tasks for an Implementation Project: Explained

Implementation projects have the correct list of setup tasks for you to assign to the appropriate individuals for execution. You can monitor the progress of the setup data entry using the Overview page. You can specify due dates for completing the assigned tasks, which are recommended since due dates help you monitor the progress of the task assignments, which in turn determines the progress of the overall implementation project.

You can assign a single individual or multiple individuals to a setup task. If you assign multiple people to a task, then the same due date can be assigned to each person, or each assigned individual can have a different due date. Each individual can perform the task independently of the others. You can reassign tasks, and specify a new due date at any time.

 **Note:** If you assign a task list to a person, then they are assigned all the included tasks.

Monitoring an Implementation Project: Explained

Several graphical reports are available for you to monitor and analyze the progress of the assigned tasks in your implementation project. You can drill down on the graphs on the Overview page to get all the information you want to track the progress of your project.

Assignment by Status

This pie chart shows the statuses of the assigned tasks as percentages of the total number of tasks in an implementation project. The pie also shows the actual number of tasks with the specific status. The task statuses are predefined and used to indicate the progress.

Task Status

Shows the exact status of the tasks:

- Not Started
- In Progress
- Completed
- Execution Frozen
- Submitted
- Completed with Errors
- Completed with Warnings

Assignment by Due Dates

A stacked column graph that shows the number of assignments with due dates in various predefined time periods as columns broken down by different task statuses representing the stacks within a specific time period.

Due Date Periods

The report compares due dates of the assigned tasks with current date to determine which time period a task belongs to. The predefined due date periods are as follows:

- Past Due

(one week or more)

- This Week
- Next Week
- In 3 Weeks
- In 4 Weeks
- After 4 Weeks
- None

(no due date)

Task Status by Task List

This stacked column graph shows the total number of tasks as columns for each of the task list in an implementation project. This includes tasks from all subsequent levels of the task list. Each column is further broken down by task status, which represents the stacks within a column. Since the task lists are organized in a hierarchy in an implementation project, the graph displays only the top nodes of an implementation project at first. You can drill down on each graph to view the next level details.

Top Five Reports

Both the Top Five Assigned Users with Incomplete Tasks by Due Dates and the Top Five Task Allocations reports are included.

Maintaining Setup Data: Explained

All implementations require modifications to the setup data over time. A full implementation cycle using an implementation project is recommended for larger and higher risk modifications, such as reorganizing territories, or adding a new tax regime. You can make smaller changes such as changing profile options, or a list of values by searching for the appropriate task from the Overview page and performing the task directly from there.

When setup data of an existing implementation requires modification that involves a significant number of tasks and task lists or has high risk implication in many parts of an application, maintaining those setup changes through implementation projects is advisable. Often you should perform the modifications in a test environment to mitigate risks before applying the changes to a production environment.

For maintenance of setup data, you can create an implementation project without selecting offerings or functional areas. You can add tasks and task lists specific to the needed modification directly to the implementation project. Once the implementation project is created, functionality is exactly the same as any implementation project you create based on offerings and functional areas. The processes for assigning users to tasks to maintain the setup data and finally to export and import the changes to the target instance is the same as implementation projects you create based on offerings and functional areas.

Completing Tasks not in an Implementation Project: Points to Consider

You should consider performing task outside of an implementation project if you only want to perform one or two setup tasks independently of other tasks. you typically perform these tasks in the application instance where the change is needed, such as in the production instance. Here are three important points to consider:

- Searching by task name or business object
- Performing the task
- Security validation

Searching by Task Name or Business Object

Using the Overview page in the Setup and Maintenance work area you can search for the task you want to perform by using the **All Tasks** tab and searching on the name or the associated business object name. Tasks appear regardless of what feature choices are selected for the configured offerings.

Performing the Task

Once search results return you execute the appropriate task directly from the search results by selecting the **Go to Task** icon. Performing a setup task from the search results is the same as performing the same task when assigned through an implementation project.

Security Validation

You are able to see many tasks, but can only execute the tasks that you have security entitlements to execute. If you do not have the correct entitlements, you receive an error message when attempting to execute the task.

Copy Configuration: Explained

You can use Oracle Fusion Functional Setup Manager to implement a new configuration by copying an existing one that is similar and only requires few modifications. For example, you can create a new Business Unit by copying an existing one and then changing some of the Flexfield segment values to support the new configuration. During the copy configuration process, a new configuration is always created. Copy configuration doesn't allow you to modify an existing configuration. If you require modification of an existing configuration, navigate to the tasks and edit the appropriate data. You must have the Applications Implementation Consultant role to perform the copy configuration process.

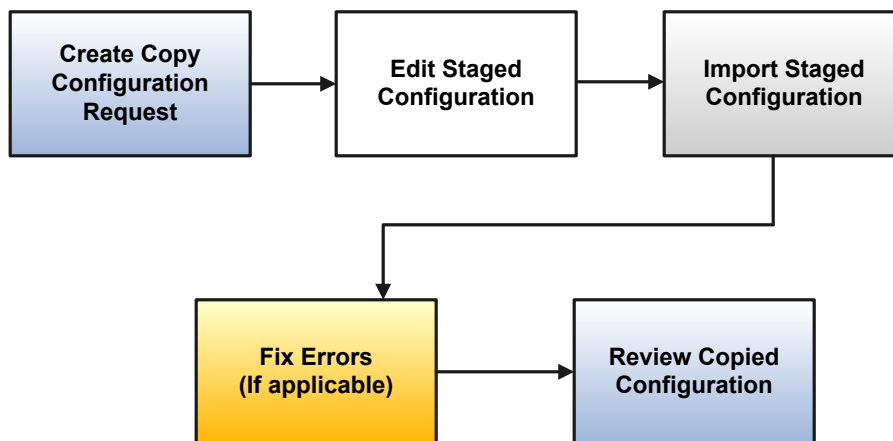
How Copy Configuration Works

During the process of copying an existing configuration, you first select the existing configuration you want to copy setup data from to create the new configuration. The setup data is then copied to a staging area where you can edit it and make the appropriate modifications to create the new configuration. As the purpose of the copy functionality is to provide an easier way to speed up the implementation of new configurations, only the most commonly required and applicable attributes of

the configuration are exposed. The copy configuration process takes care of handling the data dependencies that exist in the configuration and replicating the appropriate setup data.

After completing the modifications to the setup data, submit the import process to create the new configuration. You have the opportunity to review any errors while importing the setup data and creating the new configuration. After the process completes, the new configuration is ready to review. It's recommended that you review your new configuration before using it. To do so, navigate to each of the tasks of the configuration and make any additional modifications, if required.

The following figure illustrates the steps in the copy configuration process.



Copy Configuration: Step by Step

The steps in the copy configuration process are as follows.

Create Copy Configuration Request

You use the Create Copy Configuration Request page to begin the Copy Configuration process. You navigate to this page by selecting **Copy Configurations** in the Setup and Maintenance Work Area. You can create a new copy configuration request for the following items:

- Business Unit Configuration for Financials

When you select **Create** to begin the process, you select the business object value, or scope value, that you want to copy. The copy configuration process makes a duplicate of the setup data for all business objects relevant to the selected configuration and scope value. You modify these values later in the process.

Editing a Staged Configuration

Once the original configuration is copied to the staging area, the process status is set to Ready to Edit. For editing the setup data of the staged configuration, click **Ready to Edit** in the status column appearing on the Copy Configurations page. You are presented with the minimum list of setup data required for the new configuration to function. The attributes vary depending on the configuration you are copying. You edit the staged configuration by selecting a specific attribute and entering or updating its value.

You can either accept the source value, or provided a new value. You must enter all required values and save the modifications to the configuration. Once the modifications are saved, the status changes to Ready to Import, so you can import the new configuration.

Importing a Staged Configuration

Configurations that have been edited at least once and all required attributes are completed, are listed with a status Ready to Import. Click on the **Status** column of the Copy Configuration Requests region to import the new configuration. The minimum setup data required for your new configuration displays for final review. You can compare the values from the source configuration against the values in the new configuration. Pay special attention to those attributes. You can't edit the values once the configuration is created. If you need to edit these values, you can select **Edit** to make modifications.

Once the configuration is ready, you select **Import** to load the staged configuration into the current environment. You can monitor the import process by selecting **Import in Progress** from the Copy Configuration Requests region and periodically selecting the **Refresh** icon.

Fixing Copy Configuration Errors

Any errors that occur either while copying the setup data to the staging area or importing the setup data of the new configuration, are reported, and the process status is set to Ready to fix errors. Click the **Ready to fix errors** link to review the report and identify where the error occurred. The report lists all business objects in the order they were processed.

Most errors occurring during staging might be specific to service availability and need to be reported to help desk. Some errors encountered while importing the setup data of the new configuration may be related to data conflicts such as attempting to create an object that already exists or misspellings. You may easily fix these errors. Use **Edit Staged Configuration** to make modifications to resolve the error reported for the configuration you are trying to import, and then resubmit the process. Otherwise, report the issue to your help desk indicating the owning product as indicated in the error. Download and attach the process status details report when reporting the issue.

Reviewing a Copied Configuration

Copy configuration processes that succeeding importing the new configuration are listed with status set to Ready to review. Select **Ready to review** in the **Status** column of the Copy Configuration Requests region to review the new configuration. You can select the **Go to Task** icon for each setup task displayed to verify the setup data is correct.

FAQs for Managing an Application Implementation

What's a setup task?

A setup task is performed to enter setup data for offerings to make them ready for transaction processing. Tasks represent the work necessary to set up initial configurations of offerings, and in turn the business processes and activities that those offerings support to make them ready for transactions. For example, Manage Reporting Currency, Assign Balancing Segments to Ledger, and Manage Tax Regime are setup tasks you perform to make the Financials offering ready for transactions.

What's a setup task list?

A setup task list is a logical grouping of setup tasks that are related to the same business processes or activity, and are often performed together. Task lists are hierarchical: a parent task list can include children that are either tasks or other task lists.

What's an offering?

An offering is the highest level grouping of Oracle Fusion Applications functionality. Offerings are typically the starting points for configuration decisions. As the core drivers of provisioning and implementing Oracle Fusion Applications, offerings are groups of application functions representing one or more typical business processes and subprocesses that are usually implemented as a unit. They include required and optional business processes and alternative business rules known as functional areas and features.

What's a functional area?

A functional area is a grouping of functionality within an offering. It may be an optional piece of functionality that you may want to implement as part of an offering. Optional functional areas can be included or excluded from their parent offering. Functional areas may be hierarchical, and therefore may be subordinate to another functional area. An offering has at least one base or core functional area and may have one or more optional functional areas. Additionally, one or more features may be associated to an offering.

What's a feature?

Features are alternative business methods or rules used to fine-tune business processes and activities supported by an offering or a functional area.

What happens if Enable for Implementation is selected for an offering?

An offering may have some optional functional areas. You can select which optional functional areas you want to implement according to your unique requirements. Dependent functional areas that represent optional functionality of an offering may or may not be relevant to an implementation, and are not automatically enabled when you select **Enable for Implementation**. You select **Enable for Implementation** and configure the dependent functional areas and features that match what you need for your business. This is why the dependent functional areas are not automatically enabled.

What's a business process?

A business process is a collection of related, structured activities or tasks performed to achieve a particular business goal such as fulfilling orders, procuring raw material, or closing an accounting period. Enterprise applications are a means to achieve the end goal of optimizing a business process. Oracle Fusion Applications use business processes as a platform, or framework, to deliver enterprise application functions in context.

How can I configure only licensed offerings and functional areas?

All offerings and functional areas display on the Configure Offerings page and are available for configuration. However, the Provisioned column indicates if an offering or functional area is installed and provisioned. If you attempt to enable an offering or functional area for implementation that is not provisioned, a warning message appears.

When does a dependency need to be defined for a business object?

If the selection of a business object for a task list requires another business object to identify the selection, you must define a dependency between the two objects. For example, several tasks need to be performed to set up a transaction tax. Each transaction tax is only relevant in the context of a tax regime. Therefore, if tax regime is defined as the parent business object for transaction tax, then you are able to select the appropriate tax regime and transaction tax combinations when performing the list of tasks to set up taxes.

What happens if a task is assigned to more than one person?

If a task is assigned to more than one person, it displays on each person's Assigned Implementation Tasks tab. Each assignee can have a different due date and can track the status of the task separately.

Why did my implementation project omit the tasks for a new functional area or feature I enabled on the Configure Offerings page?

The task list for an implementation project is created based on the offering, functional area and feature selections enabled when you created the implementation project. The task list of an implementation project is self-contained once generated, and new selections of offerings, functional areas or features do not affect it.

Why does each offering include common tasks?

The autogenerated list of tasks for implementing any offering is self-contained. It includes all tasks, including the prerequisites, to complete implementation of any given offering. The task list gives you full visibility to the end-to-end setup requirements. By having a complete task list self-contained within the implementation of each offering, dependencies on any particular order needed for offerings implementation are eliminated and you can decide how best to manage the implementation according to your business needs.

When does it make sense to customize a task list?

A comprehensive list of setup tasks generates automatically when you create an implementation project. You can further customize the list by adding or removing tasks to address any exception cases. This editing is an optional step that you may consider after reviewing the generated task list and comparing it with your implementation needs. When adding tasks you can decide where in the hierarchy the tasks fit and you can sequence the implementation task list accordingly. When adding, reordering or removing tasks you must consider data dependencies and their implications on export.

When does a duplicate common task need to be deleted from the task list to avoid duplicating setup data?

Generally you do not need to delete duplicate common tasks. Common tasks are repeated in an implementation project in case implementation of multiple offerings requires different data for the same task. Each duplicate task points to the same interface and data irrespective of which offering implementation it is used for, so setup data is not duplicated unless you want to do so. You can review the existing data and decide whether or not to enter additional data because of the new offering.

What happens if I create a custom task and add it to an existing implementation project?

You can create custom tasks and add them to implementation projects. Typically you must also create the business objects for holding setup data, an interface for entering data, and a web service for export or import of the data. If you create a custom task for common reference objects, you do not have to create the related items. The export and import process treats the custom tasks just like any other Oracle Fusion predefined task.

How can I see what types of setup data I enter using an implementation project?

The Manage Implementation Project page shows the hierarchy of setup tasks by default. You can toggle the view from task hierarchy to business object hierarchy to find out what setup data is entered through an implementation project. The sequence of the business objects in the hierarchy indicates the order in which the setup data exports and imports when you export or import the implementation project.

What happens if I assign more than one user to the same task?

You can assign a task to one or many users, each with the same due date or different due dates. Each user can perform the tasks independently.

Why did the task not show as completed when I returned to my assigned task list after entering data?

You must set the task status manually. Just by returning to your assigned task list after entering setup data for a task might not necessarily mean that the task was completed. Consider the scenario when you might be entering data and interrupted before completion. In this case, you can save your work and return later to complete entering data. When you return to the assigned task list, change the task status to an appropriate value.

Why did a common task I already performed and set to completed not show as completed in every instance of the task across multiple implementation projects?

You set the task status individually for each task, including duplicated common tasks. Some tasks might need a different set of data for a different implementation. The status of a task does not update based on its status in a previous implementation. For example, you implement Financial Control and Reporting and complete currency setup. Later, when you implement Procurement, you want a few additional currencies for paying suppliers but not for financial reporting.

When does it make sense to create an implementation project to make changes to my setup data?

You do not necessarily have to create an implementation project to make changes to setup data. For low risk changes you can search for a task by name or its associated business object name and then perform the task again to enter the data into the appropriate page.

When does a task have to be required?

If a task within a given task list must be performed to successfully complete the task list, then the task should be identified as a required task within that task list.

What's an implementation project?

An implementation project consists of all the tasks required for the implementation. You refine the list of tasks for the implementation project by reviewing and selecting functional areas and features. Because only tasks required for the selected functionality are included, project initiation productivity is improved.

Selecting offerings, functional areas, and the related features associated with each offering creates an implementation task list based only on the functionality you implement. This can greatly enhance productivity by presenting a targeted list of tasks in the appropriate implementation order.

What happens if I change a task list in an implementation project after some tasks have been performed?

You can customize the implementation project task list at any time. Your changes become effective immediately so the implementation project is maintained and current. Your new tasks are immediately available for assignment, status reporting, and execution.

How can I view implementation-specific reports?

You can download and print a set of reports at each level of the implementation task list hierarchy. These reports show the relevant information for the task list and all dependent task lists and tasks. The available reports are the Setup Task Lists and Tasks report, the Related Business Objects report, and the Related Enterprise Applications report.

Can I make modifications to the new configuration after it's created?

Yes. You can make any relevant modification to the configuration once it's created by accessing the tasks. However, bear in mind that some attributes may not be edited once the configuration is created.

Can I use the same configuration to copy multiple times?

Yes. You can select the same configuration as the source for multiple copies. However, you must initiate a new process for each new configuration you want to create; that is because you are modifying a copy of the setup data for each new configuration.

Can I use copy configuration to modify an existing configuration?

No. Copy configuration will always create a new configuration. If you require to modify an existing configuration, do so by modifying the data navigating through the tasks of such configuration.

What happens if I made modifications to the original configuration I selected as source to create a new configuration. Will those modifications be synchronized with the new configuration?

No. None of the modifications you made to the original configuration after the copy process already staged are in the new configuration, even though you may have edited or imported it. If you require the modified original configuration, start another copy process.

What happens if I delete the copy request once the new configuration was already imported, will it delete the new configuration?

Deleting the copy request will not delete the setup data of a new configuration you have already imported. However, if the configuration has not been imported, it deletes the staged configuration and any modifications you have made.

3 Importing and Exporting Setup Data

Exporting and Importing Setup Data: Overview

Almost all Oracle Fusion application implementations require moving functional setup data from one instance into another at various points in the life cycle of the applications. For example, one of the typical cases in any enterprise application implementation is to first implement in a development or test application instance and then deploy to a production application instance after thorough testing. You can move functional setup configurations of applications from one application instance into another by exporting and importing setup data.

Setup data can be exported and imported for either:

- An entire offering or any of its functional areas. This option is recommended when you want to make sure all the setup data for an offering or functional area is migrated.
- An implementation project that contains a customized configuration or list of tasks. Use an implementation project as the source for exporting setup data when you require customizing the list of tasks or the list of objects you want to export setup data for.

In the case of an offering or functional area, setup data is exported only for the tasks relevant to the features that are enabled for implementation in such offering or functional area. Unlike the case of export an offering or functional area, an implementation project may also include tasks for an entire offering or a functional area but the list of tasks may have been customized to specific needs adding or removing some of the tasks.

Offering Based Export and Import: Explained

It's strongly recommended you use this method for data export and import to ensure migration of all relevant setup data to the offering or functional area. This is especially useful when doing your initial implementation or moving your implementation or configuration across instances for the first time.

This method is advantageous over others because does not need you to choose the tasks nor understand data relationships to ensure only setup data relevant to the selected offering or functional area is exported. At the same time, gives you flexibility to filter the setup data (where applicable) for such offering or functional area.

Export and import offering setup data processes are initiated from the Applications Administration tab in the Setup and Maintenance work area. Select the offering or functional area you want to export or import setup data for, and then select Export or Import action.

Export

During export, appropriate setup data will be identified as follows:

- When you export setup data for an offering, the export definition will include setup data for all enabled functional areas and relevant features in the offering.
- When you export setup data for a single functional area within an offering, the export definition will only include setup data for that functional area and relevant features.

Initiate the setup data export for an offering from the applications administration tab on the overview page of the Setup and Maintenance work area. Once you initiate the export process, you can monitor its progress and check its status from the

Export Offering Page. Once the process is complete you can review the reports. Selecting Export for either a functional area or offering invokes the Export Offering Setup Data page where you create an export process for the offering or functional area you want to export.

Import

During import, a configuration package created by the export process is uploaded. All setup data contained in the configuration package is imported into the environment you initiate the setup data import from. Once you initiate the import process, you can monitor its progress and check its status from the Export Offering Page. Once the process is complete you can review the reports. Similarly, selecting Import on the Application Administration tab invokes the Import Offering Setup Data page where you can upload and import previously exported setup data.

Implementation Project Based Export and Import: Explained

Use an implementation project as the source for exporting setup data when you are required to customize the list of tasks or of objects you want to export setup data for.

You must explicitly create a configuration package from the Manage Configuration Packages page to export setup data for an implementation project. You generate the setup export and import definition by selecting an implementation project and creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. Depending on your needs, when you create a configuration package based on an implementation project, you can also customize some additional aspects, as explained here.

- Exclude some of the business objects from the configuration you selected to export setup data for.

You should limit to use this option when the corresponding setup data is already available in the target instance and therefore no data dependency issues appear during import.

- Change the default import sequence of the business objects

Change the default import sequence of the business objects. It's strongly recommended that you limit using this option when you need to correct a data dependency issue and you fully understand the data relationships between the business objects of your configuration.

- Filter the setup data to export

Export

During export, appropriate setup data is identified based on the tasks in the implementation project used as source for the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. Once export completes, you can download the configuration package file as a zipped archive of multiple XML files, move it to the target application instance, and upload and import it. After exporting the setup data you may continue entering new or modifying existing setup data for your configuration. Since the configuration package is a snapshot of the setup data taken at the time export is initiated, you may need to take another snapshot of the same configuration or set of data later. Although you can always create a different configuration package, FSM provides you the ability to take another snapshot of the setup data using the same customized export and import definition by exporting the configuration package multiple times and creating multiple versions. While the export definition remains the same in each version, the setup data can be different if you modified the data in the time period between the different runs of the

export process. Since each version of the configuration package has a snapshot of the data in the source instance, you can compare and analyze various versions of the configuration package to see how the setup data changed.

Import

During import, you first upload a configuration package created by the export process and then import the setup data. All setup data contained in the configuration package is imported into the environment you initiate the setup data import from. In the target application instance, the setup import process inserts all new data from the source configuration package that does not already exist, and update any existing data with changes from the source. Setup data that exists in the target instance but not in source will remain unchanged.

Configuration Packages: Explained

A Configuration Package contains the setup import and export definition. The setup import and export definition is the list of setup tasks and their associated business objects that identifies the setup data for export as well as the data itself. When you create a configuration package only the setup export and import definition exists. Once you submit export, a snapshot of the appropriate setup data is added to the configuration package using the definition. You can continue making modifications to the setup data in the environment and create a new configuration package any time you need it.

You can generate the setup export and import definition implicitly or explicitly:

- A configuration package is created implicitly when you export setup data for an entire offering or any functional area from the Applications Administration page.
- A configuration package is created explicitly when you export setup data based on an implementation project. This method enables further customization of the configuration packages.

You generate the setup export and import definition by selecting an implementation project and creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.

The tasks and their associated business objects in the selected configuration (offering, functional area or implementation project) define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.


Once a configuration package is exported, the setup export and import definition is locked and cannot be changed; that is, you cannot change the selection (add or remove) of tasks and their associated business objects, change their export and import sequence, nor the scope value selection. However, you can create a new configuration package with such modifications at any time.


Business Object Import Sequence: Explained

The setup data for business objects related to tasks are imported according to the import sequence. The default business object import sequence is derived based on the sequence of the tasks within the configuration selected to export setup data for. This is because the task sequence should be congruent to the sequence you need to enter the related data to prevent dependency failures.

Oracle delivered task lists have been designed with the data dependency in mind to avoid errors while running import. Therefore, the default sequence of the tasks within an offering or functional area takes into consideration such dependencies and prevents dependency failures.

The application assigns the lowest import sequence number to the business objects associated to the first task and increases the sequence number for the successive tasks.

 **Note:** When you create an implementation project and customize the list of tasks, you must consider the dependencies between the setup data. It is strongly recommended that you have no more than one offering in an implementation project. This ensures that import and export of the setup data is straightforward and that the export and import sequence is correct.

 **Note:** You can change the default import sequence when creating your configuration package if you are fully aware that such changes do not result in data dependency failures during import.

The following business objects are exceptions to the default task-based sequence rule and they are always exported and imported before any other business objects in this sequence:

Business Object Name	Business Object ID
Application Taxonomy	FND_APP_TAXONOMY
Application Reference Data Set	FND_APP_REFERENCE_DATA_SET
Application Reference Data Set Assignment	FND_APP_REFERENCE_DATA_SET_ASSIGNMENT
Application Lookup	FND_APP_SET_ENABLED_LOOKUP
Data Security Policy	FND_APP_DATA_SECURITY_POLICY
Application Tree Structure	FND_APP_TREE_STRUCTURE
Application Tree Label	FND_APP_TREE_LABEL
Application Tree	FND_APP_TREE
Application Flex Value Set	FND_APP_FLEX_VALUE_SET
Application Descriptive Flexfield	FND_APP_EXTENSIBLE_FLEXFIELD
Application Extensible Flexfield	FND_APP_FLEXFIELD
Application Key Flexfield	(FND_APP_KEY_FLEXFIELD

Export Scope: Explained

All setup data from all business objects in the export definition is exported by default. However, exported setup data can be filtered by specific export scope values if the business object has scope enabled for setup data export. These business objects are known as scope enabled business objects and are typically qualifiers of other setup data. Some of the examples of business objects with scope are Business Units, Legal Entities, Ledgers, and Territories. Scope enabled business objects might potentially be used to filter or segment other setup data during setup export. Example: You can get filter and export all transaction tax data for a given tax regime. During export, you have the option to select specific scope values for such business objects and they are used as filter criteria for exporting setup data of the relevant business objects that depend on them. For any setup data where scope is applicable, only the data that matches the selected values are exported.

Customizing Configuration Packages

Customizing Configuration Packages: Points to Consider

All tasks and associated business objects in the selected implementation project are included in the setup export and import definition of a configuration package. You can customize the setup export and import definition when you use an implementation project as source for the configuration package. The following are the customization options available for configuration packages based on implementation projects.

Excluding Business Objects

If you do not want to export any specific setup data, you can exclude the corresponding business object from the setup data export and import definition of the configuration package. However, before excluding any business object, make sure that all prerequisite data for your configuration is available in the environment where you are planning to migrate the setup data. Therefore, you should limit to use this option to cases where the corresponding setup data is already available in the target instance and no data dependency issues result during import.

Reordering Business Objects


The default export and import sequence of setup data, or business objects, is the same as the order of the tasks they are associated with in the configuration. You can change the sequence in which setup data is exported and consequently imported by changing the sequence of the business objects in the setup export and import definition of your configuration package. It's strongly recommended that you limit using this option when you need to correct a data dependency issue and you fully understand the data relationships between the business objects of your configuration.

Filtering Setup Data

All setup data from all business objects in the setup export and import definition is exported by default. However, you can filter exported setup data by specific export scope values if the business object has a scope selection for setup data export. During export, you might have the option to select specific scope values. For any setup data where scope is applicable, only the data that matches the selected values transfers.

Business Objects Marked as Scope Parameters: How They are Exported

When creating a configuration package for an implementation project, you may see some business objects listed and used as scope parameters. These correspond to business objects used as parameters just for the purpose of filtering setup data for some tasks within the implementation project used as source for the configuration package.

 **Note:** Business objects that are used as scope parameters for data filtering do not appear when creating a configuration package for an offering or functional area.

How Export Handles Scope Parameters

The data for business objects used as scope parameters is not exported because these business objects are not directly associated to any tasks in the implementation project used to create the configuration package. During export, all scope values defined by user are passed to each service to filter the appropriate data. Each service uses the applicable parameters and return the appropriate setup data. Therefore data of the business objects that depend on the business object scope parameter is filtered and exported.


Example

Receivable data may be filtered by subledger, (subledger may have been defined as the scope parameter for receivable data). Even if subledger is not associated with any tasks in the Receivables configuration you selected to export, you have the option to filter receivables data associated to certain subledgers during export. You find the subledger business object listed as scope parameter even though subledger data does not exported.

How Export Works: Explained

Functional Setup Manager exports the setup data relevant to the configuration you select (offering, functional area or implementation project). To do that Functional Setup Manager will:

1. First, it takes a snapshot of your configuration at the time of the export by creating a configuration package. This configuration package includes all the relevant tasks applicable to the selected configuration based on the features enabled for implementation at the time of the export.

 **Note:** The definition of the configuration package is unchanged once you create it. Therefore you can change the feature selection for your configuration and it will not impact the existing configuration packages.

2. Then, Functional Setup Manager identifies all business objects associated to the tasks within such configuration and assign them a sequence for the purpose of export or import their setup data. This sequence is congruent to the task sequence used to enter the setup data for such configuration.
3. The application assigns the lowest import sequence number to the business objects associated to the first task and increases the sequence number for the successive tasks.
4. Functional Setup Manager processes the business objects in the list based on the import sequence. Functional Setup Manager identifies the service associated to the business object, invokes the service to export the setup data and returns the results. The business object is then marked as processed and Functional Setup Manager continues

with the next business object in the list. If no service is available, then the business object is marked as requiring manual data loading and continues with the next business object in the list.

5. The setup data of some business objects may be processed by the same service, and hence the service exports the setup data for all the relevant business objects that shares it. Because the service takes care of all the relevant setup data at once, it only must be invoked once during the process; therefore, Functional Setup Manager marks as processed and with the same result, any other business objects sharing the same service.
6. All the scope parameters defined for the configuration being exported are passed to each service in the list when invoked. Each service handles and uses only the scope parameters relevant to its logic and exports the setup data.
7. Finally, after completing the list, Functional Setup Manager consolidates the setup data returned by each service into a compressed file known as the configuration package file. Functional Setup Manager also consolidates all the errors returned by the services while processing the setup data and generates the appropriate summary report.

How Import Works: Explained

Unlike the export setup data process, the import process acknowledges that your attention may be needed for tasks where setup data cannot be imported through a service.

Functional Setup Manager will first identify and remind you of all such tasks that are recommended to perform either:

- **Prior to import**
Oracle delivered tasks that cannot be migrated through a service, may be marked as recommended to perform prior to import when other setup data depend on it. Import setup data process warns and reminds you of performing such task before proceeding with your import process. Make sure to perform such tasks prior to import to avoid data dependency issues while running import.
- **During import**
Oracle delivered business object which setup data is prerequisite of other setup data and that do not have a service available for setup data are marked as recommended to perform during import. The import setup data process pauses when it reaches such business object and waits until user confirms such setup data was imported by user. Functional Setup Manager pauses the import setup data process at the proper time to remind you and wait for confirmation that such setup data is entered before proceeding. Make sure to perform such task prior or at the time the process is paused.
- **Post import**
Oracle delivered tasks handling third-party setup data cannot be migrated through a service, but other setup data within the configuration do not have any data dependencies. Therefore, you should perform those tasks just to ensure all your configuration setup data is migrated but you do not have to perform prior or during the import necessarily.

Depending on the method used to import the setup data, you first have to upload the configuration package file created by the export process prior to initiate the import process. During the import, this file is read to identify all the business objects which setup data is included in it. Once the import process is initiated, it warns users to perform the task recommended performing prior to import. Once user decides to continue, Functional Setup Manager starts invoking the business object services based on the import sequence assigned to the business objects in such configuration. When required, the import process pauses giving you the appropriate information and suggested actions. Resume the import process after taking the appropriate actions.

- If a setup import process paused due to errors encountered, then review the errors and take appropriate actions to correct the data or fix the issue, and then resume the process. The process resumes processing data for the failed object. However, you have the option to skip the failed object and continue processing data for the next business object in the list.

- If a setup import process paused due to a manual task to be performed outside of the application, then you perform the task and resume the paused process.

The import setup data process continues until all the services for importing the setup data are complete or user has stopped or canceled the process. Services perform an update and insert operation. That is, existing rows that are identical to the data being imported are ignored, existing rows that have differences are updated, and new rows are inserted. Each service is invoked once and imports all the setup data for the relevant business objects that share it. Any dependencies that may exist between the business objects that share a business object service are taken care and resolved by the service itself.

Export and Import Reports: Explained

The export and import setup data processes generate different reports that you can review in the application or download it for offline review, comparison and analysis:

- The results report show what setup data was exported or imported, appear ordered by business objects and include information on any errors encountered during the export or import process.
- You can drill down on the status message for the process to view the process results and resolve any errors. The results appear ordered by business objects and include information on any errors encountered during the export or import process.
- The setup data report lists all the setup data in the processed configuration package and include individual reports: one for each business object.
- Process status details report is available as a text file showing the status of an export or import process including detailed information on the errors encountered during the process. These reports show the same information as the export and import results seen directly in the application.

Incremental and Maintenance Data Import: Critical Choices

Although it's recommended that you export and import setup data for an offering, you may require an incremental data migration during your implementation. In such cases, you can export and import setup data for more granular configurations than an offering such as a functional area or a task list. There are several considerations to keep in mind if you migrate more granular configurations.

Points to consider for incremental data migration

You should fully consider the following choices before performing any incremental data migration:

- Create the implementation project with the appropriate tasks for the configuration you want to migrate.
- Make sure that all prerequisite data for your configuration is available in the environment where you are planning to migrate the setup data. For example, If you require a legal entity to exist before you migrate the setup data for a business unit configuration and the prerequisite setup data does not exist, consider to adding it to the configuration package you use to import.
- The sequence of the tasks and therefore the business objects in your configuration should align with the business object dependencies and prerequisites. Oracle delivered task lists have been designed with this in mind to avoid errors while running import.
- You may also refine the scope of the data you want to export or import while creating your configuration package by defining the scope selection. Be aware that scope selection is not available to all business objects. Check that the

business object service supports it. Check the application documentation or verify it from the application at the time you are defining your configuration package. A select and add icon is enabled on the scope table once you select the corresponding business object.

- During an incremental migration, all the setup data in the configuration package is processed inserting all new data records and updating existing setup data records according to service logic. No data is removed during the import process unless otherwise specified by the service. Consult the application release notes to review any exceptions on handling the setup data by the service.

Additional Access for Exporting and Importing Setup Data: Explained

You must have access to the Application Implementation Consultant role to export or import setup data. However, access to additional roles is needed to export and import setup data for certain business objects:

Business Object Name	Required Role Name
Corporate Card Expense Type Mapping Rule	Corporate Card Administrator
Corporate Card Company Account	Corporate Card Administrator
Corporate Card Program	Corporate Card Administrator
Corporate Card Transaction Download Parameter	Corporate Card Administrator
Corporate Card Transaction Upload Rule	Corporate Card Administrator
Corporate Card Usage Limit Rule	Corporate Card Administrator
Bank Statement Reconciliation Tolerance	Cash Manager
Bank Statement Automatic Reconciliation Matching Rule Set	Cash Manager
Bank Statement Automatic Reconciliation Matching Rule	Cash Manager
Bank Statement Transaction Creation Rule	Cash Manager
Cash Transaction Type	Cash Manager
Bank Transaction Code	Cash Manager

Business Object Name	Required Role Name
Bank Statement Parsing Rule	Cash Manager
Bank Account	Cash Manager
Bank Branch	Cash Manager
Bank	Cash Manager
Collections Aging Bucket	Collections Manager
Collections Dunning Configuration	Collections Manager
Collections Preference	Collections Manager
Collector	Collections Manager
Expense Audit Rule	Expense Manager
Expense Audit List Rule	Expense Manager
Expense Receipt Management Rule	Expense Manager
Incentive Compensation Participant	Incentive Compensation Application Administrator
Department	Human Capital Management Application Administrator
Legal Employer	Human Capital Management Application Administrator
Payroll Statutory Unit	Human Capital Management Application Administrator
Division	Human Capital Management Application Administrator
Job	Human Capital Management Application Administrator
Location	Human Capital Management Application Administrator
Enterprise Information	Human Capital Management Application Administrator
Legislative Data Group	Human Capital Management Application Administrator
Payroll Security Profile	IT Security Manager
Payroll Flow Security Profile	IT Security Manager

Business Object Name	Required Role Name
China Ledger Option	Enterprise Financial Data Export Options Management for China
China Depreciation Method Formula	Enterprise Financial Data Export Options Management for China
China Financial Information Option	Enterprise Financial Data Export Options Management for China
China Golden Tax Miscellaneous Option	Golden Tax Administration for China
China Value Added Tax Invoice Option	Golden Tax Administration for China

Concurrent Implementation Maintenance: Critical Choices

If you are concurrently implementing more than one offering at a time, you should adhere to the sequence given below when importing these Offerings into another environment to prevent data dependency issues.

Offering Import Sequence

Sequence	Family	Offering
1	HCM	Workforce Deployment
2	HCM	Compensation Management
3	HCM	Workforce Development
4	Financials	Financials
5	Financials	Fusion Accounting Hub
6	HCM	Incentive Compensation
7	CRM	Customer Data Management
8	CRM	Enterprise Contracts
9	CRM	Marketing
10	CRM	Sales
11	Procurement	Procurement

Sequence	Family	Offering
12	Projects	Project Financial Management
13	Projects	Project Execution Management
14	Projects	Grants Management
15	SCM	Materials Management and Logistics
16	SCM	Manufacturing and Supply Chain Materials Management
17	SCM	Order Management
18	SCM	Price Management
19	SCM	Product Management
20	SCM	Supply Chain Financial Orchestration
21	SCM	Supply Chain Managerial Accounting
22	SCM	Value Chain Planning
23	GRC	Risk and Controls

Setup Data Comparison: Explained

Setup data comparison identifies the differences between the setup data of two configuration packages, or two different versions of the same configuration package.

Understanding Setup Data Comparison

You can use Setup data comparison to learn how data for a given implementation has changed over time. For instance, an implementation may have been done in phases and some of the original configuration has been modified. You can track the changes over time through different versions of the same configuration package, or different configuration packages. Once you identify the setup data differences or discrepancies you make a decision on how to resolve them. You can import the setup data from the configuration package into the environment if the wanted implementation matches what is in the configuration package. You can also resolve the discrepancies for a given record or business object by editing the setup data through the relevant task. The setup data comparison functionality helps you speed up the process of identifying the differences among one or multiple business objects relevant to a configuration. The comparison identifies which records are common to either configuration packages' alternate key matching. The report shows any data differences in the records with

matching alternate keys. If alternate keys are not defined for the business object, then the entire data record is compared in the report.

 **Note:** Alternate key definition depends on the specific design of the business objects owning product or product family, and is not controlled by the application.

Comparing Configuration Packages


You can identify the setup data differences between configuration packages using the compare function available from the Manage Export and Import processes page. You must have the Application Implementation Consultant security role to compare setup data. You can compare setup data between two different configuration packages or two versions of the same configuration package. To compare a configuration package to data in a current environment, export the setup data for the current environment into a new configuration package for comparison.

To compare configuration packages:

1. Select **Manage Export and Import Processes** from the Setup and Maintenance work area.
2. Verify that both configuration packages are available and then select **Compare** on the Export and Import Processes page. You can also compare two available versions of the same configuration package.
3. Use the Comparison Process page to view an existing comparison or create a new one.
4. To create a new comparison, select **Create** and select the two configuration packages for comparison. Make sure to select the correct **Process Dates**.
5. Name the comparison process for easy identification, select **Submit**, and then refresh the Comparison Process page to monitor the progress of the comparison until it completes.

You can view the process results while it is in process by selecting the In Process status message. Once it is complete you can select the process name to view the complete results.

Configuration package comparison results display on the Configuration Package Comparison page once you select the process name. The two configuration package names appear in the Compared Configuration Packages region. The comparison identifies the data records common to both configuration packages by using the alternate keys. Any record without a match in the other source is a discrepancy and is reported. The comparison then identifies additional discrepancies by comparing each attribute value of the common data records. If one or more of the attribute values differs, it is also reported as a discrepancy.

 **Note:** If no alternate keys are defined for the business object by the owning product or product family, then the entire record is compared.

Three columns display the number of discrepancies:

- **In Both With Mismatch** Indicates how many records exist in both sources but have some differences.
- **Only in Source 1** Indicates how many records only exist in the first source and do not exist in the second source.
- **Only in Source 2** Indicates how many records only exist in the second source and do not exist in the first source.

You can select the listed number of discrepancies to view the detail report, or select **Download** to download the report. Once you finish reviewing the discrepancies, you can decide which configuration package to use, or what data to modify in the current environment.

Reference: Moving Functional Setup Data Using the Command-Line

Functional Setup Manager enables users to implement and configure all Oracle Fusion Applications as well as to move the setup data across instances. This is generally done using Functional Setup Manager export and import functionality built into the application. It is strongly recommended that you use and access this functionality from the Manage Configuration Packages page. As an alternate method, an Application Implementation Consultant user can move the setup data using the export and import functionality accessed from a command line. Be aware that some capabilities and restrictions may appear when using command-line functionality.

Moving the data requires the following steps:

1. Set up prerequisites
2. Export data from the source
3. Import data on the target

Moving setup data from the source environment to the target environment using command-line scripts: Set up Prerequisites

Before you move the Functional Setup Data to the target environment, you must identify the implementation projects used to enter and define the setup data in the source environment. Ask your Application Implementation Consultant user to gather the codes of the implementation projects. You can gather the implementation codes using Oracle Fusion Functional Setup Manager or SQL. To obtain a list of the implementation codes using SQL, use the following query: **SQL> SELECT**

```
impl_project_name, short_name from asm_impl_projects_v1;
```

To gather the implementation codes using Oracle Fusion Functional Setup Manager:

1. Sign in to Oracle Fusion Applications with a user account that is provisioned with the necessary role, such as the predefined Application Implementation Consultant role. Contact your security administrator for details.
2. From the Administration menu in the work area of Oracle Fusion Applications, select Setup and Maintenance.
3. In the Tasks pane, under the Implementations group, click Manage Implementation Projects.
4. Click an implementation project name in the Search Results. The Implementation Project page is displayed.
5. In the Basic Information section, copy the value for the Code field. Make sure to perform steps 4 and 5 for each project you want to export.
6. Ensure all the Managed Servers are started in the environment.

Moving setup data from the source environment to the target environment using command-line scripts: Export data from the source

To export the data from the source:

1. Set the USER_MEM_ARGS variable as follows: **export USER_MEM_ARGS="-Xms256m -Xmx1024m -XX:CompileThreshold=8000 -XX:PermSize=128m -XX:MaxPermSize=1024m"**

2. For either UNIX or Windows, at an operating system command prompt, navigate to the location of the `fsmConfigurationPackageExport` executable:

(UNIX) `ATGPF_ORACLE_HOME/fsm/scripts`

(Windows) `ATGPF_ORACLE_HOME\ fsm\ scripts`

`ATGPF_ORACLE_HOME` is located under the fusionapps Oracle Fusion Middleware home directory (`FA_MW_HOME`).

3. Enter `fsmConfigurationPackageExport.sh` (for UNIX) or `fsmConfigurationPackageExport.cmd` (for Windows), using the following syntax:

```
fsmConfigurationPackageExport

commonDomainInternalUrl=http://host.domain:port

jdbcUrl=jdbc:oracle:thin:@DB_host_name.domain/sid

fusionRuntimeSchema=fusion_runtime

fusionRuntimeSchemaPasswordFile=USER_HOME/fusionRuntimeSchemaPassword.txt

fsmUsername=user

fsmPasswordFile=USER_HOME/fusionRuntimeSchemaPassword.txt

implementationProjectCode=IMPLEMENTATION_PROJECT_CODE_TO_EXPORT

configurationPackageFile=USER_HOME/cp.zip

logFile=USER_HOME/log_file

jpsConfig=COMMON_DOMAIN_HOME/config/fmwconfig/jps-config-jse.xml

mwHomeLoc=MW_HOME

atgpfHomeLoc=ATGPF_ORACLE_HOME

[pollingInterval=interval]

[pollingLimit=limit]
```

The description of the options for the `fsmConfigurationPackageExport` command follows:

Option	Description	Optional or Mandatory?
<code>-commonDomainInternalUrl</code>	The CommonDomain domain internal URL on the source registered in Oracle Topology Manager in the format of Internal_Server_Protocol: // InternalServer Host:Internal_Server_Port.	Mandatory
<code>-jdbcUrl</code>	The JDBC URL in the format of jdbc: oracle: thin:@//DBhost_ name. domain/sid to the connect to the source database.	Mandatory

Option	Description	Optional or Mandatory?
-fusionRuntimeSchema	The Oracle database schema name (user name) to log in to the source database. This value should always be fusion_runtime.	Mandatory
-fusionRuntimeSchemaPasswordFile	The absolute path to the password file, which contains the schema password to log in to the source database.	Mandatory
-fsmUsername	User name to log in to Oracle Fusion Functional Setup Manager that has Application Implementation Consultant job role.	Mandatory
-fsmPasswordFile	The absolute path to the password file, which contains password to log in to Functional Setup Manager.	Mandatory
-implementationProjectCode	The implementation project code that must be exported from the source instance.	Mandatory
-configurationPackageFile	The absolute path to the configuration package ZIP file to save exported data.	Mandatory
-logFile	The absolute path to the source log file.	Mandatory
-jpsConfig	The absolute path to the jps-config.xml file.	Mandatory
mwHomeLoc	The absolute location of the source Oracle Fusion Applications Middleware Home (FA_MW_HOME). FA_MW_HOME is located under the appbase Applications base directory (APPLICATIONS_BASE).	Mandatory
-atgpfHomeLoc	The absolute location of the source Applications Core Oracle Home (ATGPF_ORACLE_HOME). ATGPF_ORACLE_HOME is located under the fusionapps Oracle Fusion Middleware home directory (FA_MW_HOME).	Mandatory
-clientPolicy	The Web Service Client Policy to be used to invoke the Oracle Enterprise Scheduler Web service to submit the export process. The default is oracle/wss10_saml_token_client_policy.	Optional
-pollingInterval	The polling interval to be used to periodically check if export process is complete. The default is 5 seconds.	Optional
-pollingLimit	The polling limit to be used until reached to check if the export process is complete. The default is 3600 seconds.	Optional

Option	Description	Optional or Mandatory?
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Moving setup data from the source environment to the target environment using command line scripts: Import data on the target

The `fsmConfigurationPackageImport` script moves the setup data for an implementation to a target instance. To import the data on the target:

1. For either UNIX or Windows, at an operating system command prompt, navigate to the location of the `fsmConfigurationPackageImport` executable:

(UNIX) `ATGPF_ORACLE_HOME/fsm/scripts`

(Windows) `ATGPF_ORACLE_HOME\fsm\scripts`

`ATGPF_ORACLE_HOME` is located under the fusionapps Oracle Fusion Middleware home directory (`FA_MW_HOME`).

2. Enter `fsmConfigurationPackageImport.sh` (for UNIX) or `fsmConfigurationPackageImport.cmd` (for Windows), using the following syntax:

```
fsmConfigurationPackageImport

commonDomainInternalUrl=http://host.domain:port

jdbcUrl=jdbc:oracle:thin:@DB_host_name.domain/sid

fusionRuntimeSchema=fusion_runtime

fusionRuntimeSchemaPasswordFile=USER_HOME/fusionRuntimeSchemaPassword.txt

fsmUsername=FUSION

fsmPasswordFile=USER_HOME/fusionRuntimeSchemaPassword.txt

configurationPackageFile=USER_HOME/cp.zip

logFile=USER_HOME/cpImport.log

jpsConfig=COMMON_DOMAIN_HOME/config/fmwconfig/jps-config-jse.xml

mwHomeLoc=MW_HOME

atgpfHomeLoc=ATGPF_ORACLE_HOME
```

The description of the options for the `fsmConfigurationPackageImport` command follows:

Option	Description	Optional or Mandatory?
-commonDomainInternalUrl	The CommonDomain domain internal URL on the source registered in Oracle Topology Manager in the format of Internal_Server_	Mandatory

Option	Description	Optional or Mandatory?
	Protocol: // InternalServer Host:Internal_Server_Port.	
-jdbcUrl	The JDBC URL in the format of jdbc: oracle: thin:@//DBhost_name. domain/sid to the connect to the source database.	Mandatory
-fusionRuntimeSchema	The Oracle database schema name (user name) to log in to the source database. This value should always be fusion_runtime.	Mandatory
-fusionRuntimeSchemaPasswordFile	The absolute path to the password file, which contains the schema password to log in to the source database.	Mandatory
-fsmUsername	User name to log in to Oracle Fusion Functional Setup Manager that has Application Implementation Consultant job role.	Mandatory
-fsmPasswordFile	The absolute path to the password file, which contains password to log in to Functional Setup Manager.	Mandatory
-implementationProjectCode	The implementation project code that must be exported from the source instance.	Mandatory
-configurationPackageFile	The absolute path to the configuration package ZIP file to save exported data.	Mandatory
-logFile	The absolute path to the source log file.	Mandatory
-jpsConfig	The absolute path to the jps-config. xml file.	Mandatory
mwhHomeLoc	The absolute location of the source Oracle Fusion Applications Middleware Home (FA_MW_HOME). FA_MW_HOME is located under the appbase Applications base directory (APPLICATIONS_BASE).	Mandatory
-atgpfHomeLoc	The absolute location of the source Applications Core Oracle Home (ATGPF_ORACLE_HOME). ATGPF_ORACLE_HOME is located under the fusionapps Oracle Fusion Middleware home directory (FA_MW_HOME).	Mandatory
-clientPolicy	The Web Service Client Policy to be used to invoke the Oracle Enterprise Scheduler Web service to submit the export process. The default is oracle/wss10_saml_token_client_policy.	Optional

Option	Description	Optional or Mandatory?
-pollingInterval	The polling interval to be used to periodically check if export process is complete. The default is 5 seconds.	Optional
-pollingLimit	The polling limit to be used until reached to check if the export process is complete. The default is 3600 seconds.	Optional

FAQs for Importing and Exporting Setup Data

What's a setup business object?

A setup business object is a self-contained representation of a business entity supported by a setup task. These are logical representations of real-world objects. Setup business objects represent the data entered when you perform setup tasks. Business objects used by setup tasks also require web services to facilitate export and import of corresponding data. Setup data entered by way of a setup task is stored in the table associated with the corresponding business object. For example, Primary Ledger is the business object of the setup task called Manage Primary Ledger. When the Manage Primary Ledger task is performed, data entered is stored in the tables associated with the Primary Ledger business object.

When does it make sense to create multiple configuration packages from the same implementation project?

You can use the same implementation project to create many configuration packages. It's only useful to do so if the list of tasks in the implementation project has changed, or tasks and their associated business objects in the selected implementation project define the setup export or import definition for the configuration package. It's also useful if you use a custom export or import definition for different configuration packages.

What happens if I modify a configuration package that I recently created?

You can only modify configuration packages that display a status of **definition in progress**. The configuration package definition is locked once you submit it for export or upload it for import. If you want to keep making modifications to a configuration package you can save it until you are ready to submit it for export.

How can I export or import an implementation project without the associated setup data?

When you create a configuration package select the option to export the setup task list only. When this configuration package exports and imports, only the task list from the selected implementation project is transported.

How can I view and print any errors generated by an import or export process?

Download and then view or print the Export Results Report or the Import Results Report for the relevant process.

When does export or import show errors at the data level as opposed to the system level?

An error at the business object level occurs if the setup export and import web services cannot start. For example, if a service cannot be found in the specified location where it is registered or access is denied to the service then the application raises an error. In general, errors occur at the system level. However, data level errors may also occur depending on how the web services are designed.

When does it make sense to create an implementation project to make changes to my setup data?

You do not necessarily have to create an implementation project to make changes to setup data. For low risk changes you can search for a task by name or its associated business object name and then perform the task again to enter the data into the appropriate page.

How can I see what setup data transfers when I export a configuration package?

When you create a configuration package by selecting an implementation project, the business objects associated with the tasks in the implementation project task list are what are included during export. You can view these business objects when you are working in the implementation project or after you create the configuration package.

Why did the export process not raise any errors when it did not export any data?

Sometimes no data exports for a business object even though the process completes successfully without any errors. This happens when only Oracle Fusion Applications predefined setup data exists in the business object. Setup export and import exclude Oracle Fusion Applications predefined setup data. A message indicating that no rows were processed and no failures occurred during export displays when the export process completes.

How can I view the associated business object hierarchy?

The task list generated for an implementation project not only drives the implementation tasks but also determines what setup data exports and imports during deployment to another instance. You can see the list of business objects representing the setup data by selecting the business objects view from the Manage Implementation Projects page. The business object view shows the business objects associated with the tasks. This gives you an insight into the order of the business objects, and therefore the setup data that exports and imports when you deploy the implementation to another instance.

What's a business object dependency?

If there is data dependency between two business objects then a hierarchical relationship can be defined between them. Typically this signifies that parent business object fully qualifies the child business object. For example, Tax Regime is the parent business object while Tax Rate is a child business object. This means, that to fully identify a tax rate you must know the tax regime as well.

Task List Scope and Business Object Hierarchy

A hierarchical relationship between business objects is especially important if you want to define hierarchical task list scope objects. Relationships between the scope objects must be defined through the hierarchical relationships of the respective business objects.

For example, a Legal Entity object is the scope for a Define Legal Reporting Unit object. If Legal Entity is the scope for Define Legal Reporting Unit, then if you want to make selection of both Legal Entity and Define Legal Reporting Unit when defining Legal Reporting Unit, you must define Legal Entity as the parent business object of Define Legal Reporting Unit.

A child or dependent business object can have one and only one parent, while a parent business object may have multiple children.

When does a dependency need to be defined for a business object?

If the selection of a business object for a task list requires another business object to identify the selection, you must define a dependency between the two objects. For example, several tasks need to be performed to set up a transaction tax. Each transaction tax is only relevant in the context of a tax regime. Therefore, if tax regime is defined as the parent business object for transaction tax, then you are able to select the appropriate tax regime and transaction tax combinations when performing the list of tasks to set up taxes.

How can I exclude any business objects from exporting or change the import sequences?

By default, all business objects related to the task list of the implementation project used in the configuration package are exported. You can exclude any business objects from exporting by deselecting the business object from the default list. If you deselect a business object then the business object data are not exported or available for subsequent import. The default import sequences of the business objects are based on the order of the related tasks in the implementation project. You can change the import sequence when creating a configuration package. As a result, the order in which the business objects export and import changes. Use caution when excluding business objects or changing their import sequences because data dependencies among the business objects might exist, which could result in failures during import.

How can I cancel an export or import process that I submitted?

You can cancel any export or import process from the Manage Export and Import Processes page or from the Manage Configuration Packages page. Select the process you want to cancel, and select **Cancel Process** from the **Actions** menu. Once you confirm to cancel the process, it completes processing of the business object that already started and does not process the remaining business objects. The process status is changed to Canceled and you are not able to resume the process.

What happens if I upload a different version of the same configuration package?

The previously uploaded version is overwritten with the newly uploaded version.

What happens if my import process remains in the Paused Due to Errors status?

An import process is set to Paused due to errors when the process has paused because either an error occurred that you must correct. Review the process results and resume the process once you have taken appropriate actions to correct the errors. The process restarts processing the same business object that failed by default. You can instruct the import process to skip the failed business object and continue with the next object if you manually entered the appropriate data or want to receive all errors at the end. Notice that additional business object having data dependency downstream may also fail if you skip the failed object without fixing the corresponding errors.

What happens when I skip the failed object during import?

The skip failed object option during importing setup data is recommended when you have taken care of the issues manually (outside the configuration package), or when no data dependencies exist for the object and you are planning to address the issues later. When you resume the import setup data process with the skip failed object option, the import process will no longer try to process setup data for the business object that generated the error last time and will proceed with the next business object in the configuration package. However, any setup data for the failed object that was previously processed by

the Import Setup Data will remain in the system. Notice that errors will be raised while processing the setup data of any other business object that depend on the failed object data that was not fixed.

What happens if my import process remains in the User Action Required status?

An import process is set to **User Action Required** when the process has paused because certain data must be imported. This occurs when a standard service to automate the setup data export and import for a business object (marked as required for other data) is not available. You have to migrate or enter the data manually using another application or process external to the Setup and Maintenance Work Area. Review the process results to identify the business object and resume the process once you have taken appropriate actions to externally import the required data.

What happens when I resume the import setup data process without loading the requested data?

Errors may occur later while importing setup data for other objects that depend on the business object you suppose to manually import data for. However, if the setup data already exists in the environment due to was previously imported, you can resume the process without any issues.

Can I run the Import Setup Data process without pausing and obtain a report of all errors at the end?

Yes. To do so, make sure to unmark the option **Pause each time an error occurs** when submitting or resuming the Import Setup Data process. After the process finishes, review the process results to get the error details. The import processes all the business objects but it may still pause with status User Action Required if any business object requires manual import. You can identify what objects require prior manual data import, if any, and force the process to run without pausing for manual import. To do so, navigate to the **Pause for External Import** step when submitting the import setup data process, then identify all business objects marked for pause and deselect them.

Why was no data exported for my business object?

The export process will always export the setup data rows that are not pre-seeded, or custom. If you haven't entered any custom data for a given business object, the process will report a message indicating no rows were processed. If you are sure you have custom data for the business object, make sure to report this to the product that owns the business object.

Why did I get a message saying Manual Export Status Pending?

During the Export Setup Data process, some business objects may finish with the status Manual Export Pending. This indicates that a service to export the setup data for this business object is not available, and the application cannot automatically export the setup data. If any setup data for this business object exists in the environment you are exporting the

data from, you must manually set it up in the environment where you are planning to import the setup data. During the import setup data process a pause will occurred if the setup data is needed as prerequisite for any other business object.

Do I need to wait for the process to pause in User Action Required to manually import the setup data?

No. The Import Setup Data process pauses to alert you when such data is required based on the configuration you are importing. You can manually import it prior to the process pauses.

Why did import errors appear when no data to import is found?

If your configuration package contains no data for a given business object, the import process sets the status to Completed with Errors and indicates that no data is found. The application is trying to ensure that all relevant data for a given implementation is available during the import. If data does not exist or you do not want to import data for the business object, you can bypass these errors by resuming the import process without pausing for errors.

How can I understand if an export or import setup data process is making progress and know what business object is currently processing?

To identify the business object that an export or import setup data is processing at any time while the process is running:

1. Navigate to the **Manage Configuration Packages** or **Manage Export and Import Processes** page.
2. Locate the export or import setup data process you are interested.
3. Navigate to the export and import process results page by clicking on the **Status** column.
4. Look at the **Total of Objects Processed** that appears at the bottom of the **Object Details** table to identify how many objects have processed. Refresh the page and review this value again to see any progress.
5. Open the **Status** menu and select In progress to filter the contents of the **Object Details** table on the **Export and Import process results** page.

The name of the business object currently being processed displays in the table.

For an offering based export or import process initiated from the **Applications Administration** page:

1. Select the corresponding offering from the **Applications Administration** page.
2. Select the export or import process you are interested in.
3. Navigate to the **export and import process results page** by clicking on the **status** column.
4. Look at the **Total of Objects Processed** that appears at the bottom of the **Object Details** table in order to identify how many objects have been processed so far. Refresh the page and review this value again to see any progress.
5. Open the **Status** menu and select **In progress** to filter the contents of the **Object Details** table on the **Export and Import process results** page.

The name of the business object currently being processed displays in the table.

Why does the configuration package contain some scope values by default?

If you have selected any scope values when performing an assigned implementation task, then the selected values are preselected as candidates for filtering setup during export and import. Some application core tasks, such as tasks for defining profile options, have parameters defined that you can use as setup filters and are preselected as filter candidates for export and import. You can remove any of these preselected values when you are creating the configuration package. You can also add more scope values for export and import purposes only.

