Oracle® Install Base

Implementation Guide

Release 11*i*

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Oracle Install Base Implementation Guide, Release 11*i*

Part No. A95106-02

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Preface

Audience for This Guide

Welcome to Release 11*i* of the *Oracle Install Base Implementation Guide*.

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

- The principles and customary practices of your business area.

  If you have never used Oracle Install Base, Oracle suggests you attend one or more of the Oracle Install Base training classes available through Oracle University.

- The Oracle Applications graphical user interface.

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

See Other Information Sources for more information about Oracle Applications product information.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information,

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Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

How To Use This Guide

This document contains the information you need to implement Oracle Install Base.

- Chapter 1 provides overviews of the application, its features, functions, and integration points with other applications.
- Chapter 2 provides details of the setup steps to implement the product.
- Chapter 3 describes the configuration of the system profile options for the product.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Install Base.

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

Online Documentation
All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Install Base shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Install Base.

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

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

Documents Related to All Products

Oracle Applications User's Guide

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

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

Documents Related to This Product

Oracle Enterprise Install Base Implementation Guide

Refer to this guide to understand the implementation of a closely related product.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Install Base. This manual details additional steps and setup considerations for implementing Oracle Install Base with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Install Base with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Install Base.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Oracle Enterprise Install Base Implementation Guide

This guide is required for the setup of the ERP integrations with Install Base.

Oracle Manufacturing Implementation Guide

This document is required for the setup of Inventory, Bill of Material, and WIP.

Oracle Service Fulfillment Manager Implementation Guide

This document is required for the setup of the SFM (Service Fulfillment Manager) Advanced Queue used in the ERP integration with Install Base .

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Install Base and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Install Base working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Overview of Oracle Install Base

1.1 Definition of Oracle Install Base

Oracle Install Base is a repository of product information, location, status, party relationships, configuration, ownership, accounts, and change history for a customer product, an asset, or a software license. It offers life-cycle tracking of an item from the time that it is received, in inventory, in WIP, in projects, at customer sites, or during repair. Install Base also records a history of changes to tracked items and does so independently of their ownership, physical location, or accounting classification.

Install Base is specifically designed to track serialized and non-serialized item instances for the following:

- Tangible products
- Tangible assets
- Software
- Communications and utility services

1.2 What Is New for Oracle Install Base in This Release

Oracle Install Base was originally designed to track information about customer units. For this release the original concept has been expanded to support tracking of any unit regardless of business party relationships, location, or accounting classification. Thus the application now tracks generalized item instances.

1.3 Features of Oracle Install Base

1.3.1 Functional Overview

Oracle Install Base leverages existing CRM and ERP applications and is fully integrated with the Oracle e-Business Suite. It provides the following functionality:

- Instance maintenance
- Instance to multiple party/account relationships
- Accounting classifications
- Maintenance of instance-to-instance relationships
- History of all changes
- Mass edits by a future-dated, mass load capability
- Definable extended attributes

1.3.2 Instance Maintenance

Oracle Install Base provides for creation, update, querying, and copying of instances through Install Base user interfaces or through integration from CRM modules such as Field Services and Depot Repair, and ERP modules such as Receipts, WIP completion, Inventory transactions, Asset Installation, Order Management, and Shipping. It provides tracking of location, status, addresses, contacts, business party relationships, inter-instance relationships, an extended set of attributes for pricing, and the instance itself.

1.3.3 Multiple Party/Account Relationships

Oracle Install Base provides for association of an instance to different party types such as party, employee, or vendor. Each Install Base instance must always have an owner. If the owner is of type Party, then an account of the party is also mandatory. For each party type, you can define relationship types, such as Service Provider. Each party can have multiple accounts. This feature supports the multiple business relationships for globalization and outsourcing requirements of today's businesses.

1.3.4 Accounting Classification

Oracle Install Base provides for associations of an instance with different account types, such as inventory, customer product, and asset, to support the tracking of internally and externally owned products.

1.3.5 Multiple Inter-Instance Relationships

Oracle Install Base provides for different kinds of relationship that can exist between instances, such as component-of, member-of, connected-to, provided-by, upgraded-from, and installed-on. It also supports the creation of a component-of structure at the time of instance creation from Bill of Material (BOM) during integration with Order Management (OM).

1.3.6 History of All Transactions

Oracle Install Base records any changes made to an instance in terms of the transaction type, the source reference, date, and time. It tracks changes to the inter-instance relationships, party/account relationships, location, resources, version labels, and associated operating units, to name a few. Given a time stamp, all changes are viewable in Install Base.

1.3.7 Mass-Edit, Mass-load, and Future-Dated Transactions

Oracle Install Base supports a mass edit function so that a set of instance attributes such as location and party change can be updated given a specific set of selection criteria. These transactions can be set to run on a future date. In order to load a large amount of data into Install Base, an open interface is provided.

1.3.8 Extended Attributes

Oracle Install Base supports extended pricing and instance attributes, which can be user-defined and populated to fit any specific business needs.

1.4 Integration Points and Dependencies for Oracle Install Base

1.4.1 Cross-CRM Integration

Oracle Install Base has the following integration points within the CRM suite:

- Updates to Counters and Notes

- Direct updates from Field Service and Advanced Service Online (ASO)
- Access for view and reference by the rest of CRM applications including Contracts and Service Request
- Trading Community Architecture (TCA) party for party and relationship
- Instance creation and updates from Contracts (OKi, OKB)

1.4.2 ERP-Install Base Integration

Oracle Install Base has the following integration points with Oracle ERP applications through the Oracle Service Fulfillment Manager (SFM) Advanced Queue and Oracle Enterprise Install Base processing:

- Inventory receiving and purchase order receiving
- Inventory transactions
- Order management
  - RMA receiving
  - Sales order shipping
  - Sales order fulfillment
- Fixed assets
- Projects
- Work in process

1.4.3 Inventory Receiving and Purchase Order Receiving

If an item is set up as trackable in Install Base, an inventory receipt such as miscellaneous receipt or PO receipt causes the creation or update of an Install Base instance. At the time the inventory transaction happens, a message is sent to the SFM advanced queue. It is automatically de-queued and processed to update Install Base. Refer to *Oracle Enterprise Installed Base Implementation Guide* and *Oracle Enterprise Installed Base Concepts and Procedures* for more information.

If an item is non-serialized and controlled, and if an instance already exists for it at the same subinventory location, it is added to the quantity of the instance with the same subinventory location. If an instance for the same item subinventory location does not exist, then a new instance is created

If an item is serial controlled at receipt or is predefined, then an instance is created for it with quantity of 1 with location in the subinventory location

If an item is serial controlled at order issue, then it is treated as a non-serialized controlled item in inventory. Only at order-issue time, when it gets a serial number, is an instance with the serial number created.

1.4.4 Inventory Transactions

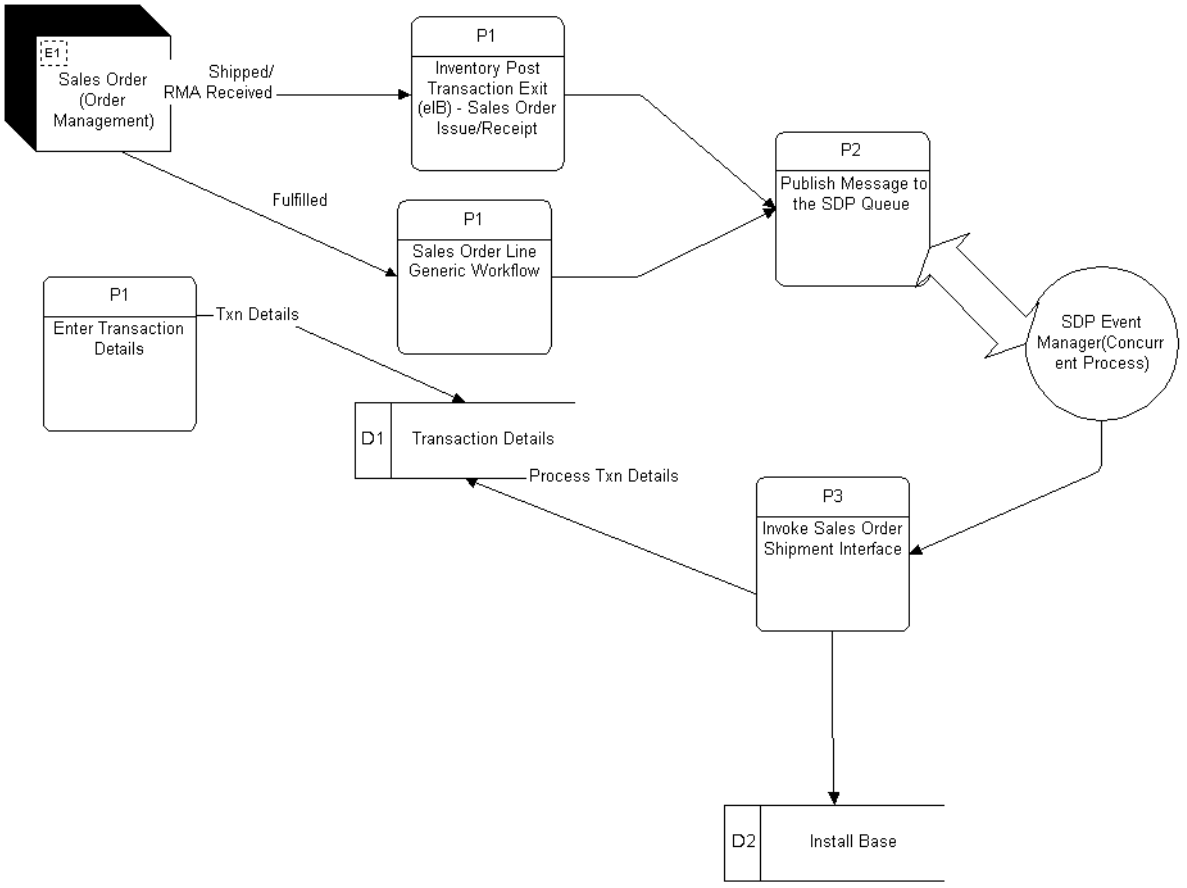
If an Install Base trackable item has been received into inventory and an Install Base instance has been created, then any subsequent inventory transactions will be tracked in Install Base as well.

For an inventory transfer or move order transaction, the location of an instance is updated to reflect the new location for a serialized item. For a non-serialized item, the quantity of the instance at the From location is subtracted, and the quantity of the instance at the To location is increased by the quantity being moved. If the item is issued to a WIP job, then the location of the item reflects the WIP job number. If it is transferred with an internal order, then the location reflects the internal sales order. If it is issued to an asset, then it reflects the asset number. If it is issued to a project/task, then the location of the instance shows the project and task number. Refer to Enterprise Install Base documentation for more details.

1.4.5 Order Management Integration

In this release, Order Management is the only ERP integration that implements the functionality of Install Base installation detail. This includes RMA receipt, sales order shipment, and sales order fulfillment. Figure 1–1 illustrates some of the relationships discussed in this section.

Figure 1–1 Integration of Order Management with Install Base



1.4.5.1 RMA Receiving

An RMA return receipt generates an inventory receipt material transaction in the Inventory application. If an item never exists in Install Base, the RMA receipt causes a new instance to be created with the location in inventory. If the instance already exists in Install Base, this return can cause a change of location, depending on the Install Base transaction type being used and provided that the serial number is entered in the installation detail.

In the sales return line, installation detail can be invoked to specify additional details for this instance and other related instances for this update to Install Base.

Refer to Section 1.4.9 for information on the use of installation detail. To use the installation detail, the transaction types being used have to be previously set up. Refer to Section 2.3.18 for instructions on setting up transaction types.

1.4.5.2 Sales Order Shipment

For an Install Base trackable, shippable item, a shipping transaction generates an inventory issue transaction in the Inventory application.

For a serialized item already in inventory, this transaction causes a change of location and ownership, depending on the transaction type being used. When an item is being shipped for the first time and if it has Install Base trackable BOM components, then at the time of shipment, the component instances and component-of relationships for the trackable components are built in Install Base. The following rules apply:

- A top assembly item must be serialized controlled.
- A top assembly must be of quantity 1.
- Components can be non-serialized controlled.
- A non-serialized parent cannot own serialized components.
- A component tree stops at a quantity greater than 1.

For items serialized at sales order issue, the first-time shipment transaction causes the creation of a new instance with the serial number. If it has trackable components, then the component instances and component-of configuration for these components are built as well. The same rules apply.

In this release the creation of configuration is not supported for non-serialized top assembly through OM Integration, except for pick-to-order (PTO) and assemble-to-order (ATO) models. This creation of configuration for non-serialized top assembly can be done through the Install Base user interface.

For a non-serialized controlled item, the quantity is subtracted from the instance with the inventory location, and a new instance is created with the customer ownership and location.

The creation of a PTO model is supported as in previous versions of Install Base. At the time of sales order line, Configurator comes into play to allow the selection of optional items to be put into the PTO model. As a result, additional sales order lines are created for the mandatory and optional items. If they are Install Base trackable, then at the time of sales order shipment, instances of the top model, the trackable

components, and the component-of relationships are created in Install Base. The PTO model need not be serialized controlled.

In all cases, at the sales order line for a sales order, installation detail can be invoked to specify additional details for this instance and other related instances, for this update to Install Base. Refer to Section 1.4.9 for information on the use of installation detail.

To use the installation detail, the transaction types being used have to be previously set up. Refer to Section 2.3.18 for instructions on setting up transaction types.

In 11.5.6, the creation of an ATO is supported as well. At the time of sales order line, Configurator comes into play to allow for the selection of optional items to be put into the ATO model. Then a WIP job can be created for the configured item to be built in WIP. At the time of WIP assembly completion, the configured item instance and its configuration are created with the location in inventory. When it is shipped, the location and ownership will be changed to that of the customer. The ATO model need not be serialized controlled.

1.4.5.3 Sales Order Fulfillment

For the sales order line for an Install Base trackable, non-shippable item, the fulfillment activity in Order Management invokes the Install Base interface through the Order Line generic workflow, which is the same workflow that is used by the Sales For Communications (XNC) application.

For an Install Base trackable, non-shippable item, the serial control can be set at the level of sales order issue. The serial number for Install Base instances can be entered in the Installation detail before it is booked. The fulfillment transaction causes the creation of a new instance with the serial number. If it has trackable components, then the component instances and component-of configuration for these components will also be built the first time it is fulfilled. The following rules apply.

- A top assembly item must be serialized controlled.
- A top assembly must be of quantity 1.
- Components can be non-serialized controlled.
- A non-serialized parent cannot own serialized component.
- A component tree stops at quantity greater than 1.

For a non-serialized controlled item, a new instance is created with the customer ownership and location.

In all cases, at the sales order line for a sales order, installation detail can be invoked to specify additional details for this instance and other related instances for this update to Install Base. Refer to Section 1.4.9 for information on the use of installation detail.

To use the installation detail, the transaction types being used must have been previously set up. Refer to Section 2.3.18 for instructions on setting up transaction types.

1.4.6 WIP Integration

The creation of a serialized top assembly instance with components configuration is supported if the use of Genealogy is turned on for the WIP job. Creation of a non-serialized top assembly instance with components configuration is not supported.

At the time of WIP assembly complete inventory receipt, the interface generates an inventory receipt in the Inventory module. The Install Base interface creates an instance for the serialized top assembly and the component-of configuration of any Install Base trackable items issued to the WIP job. In this case the serial numbers of the components are known at the time of creation.

At the time of sales order shipment, the ownership and location are changed to that of the customer, depending on the transaction being used.

1.4.7 Asset Integration

For information about asset integration, refer to *Oracle Enterprise Installed Base Implementation Guide* and *Oracle Enterprise Installed Base Concepts and Procedures.*

1.4.8 Project Integration

For information about project integration, refer to *Oracle Enterprise Installed Base Implementation Guide* and *Oracle Enterprise Installed Base Concepts and Procedures.*

1.4.9 Use of Installation Details

The Transaction Details window is used to capture additional information that is used to update the instance, an RMA return line, and a sales order line.

Installation detail can be activated on the sales order line window by clicking the Actions button and selecting Installation Details. For a full description of this

window, refer to "Using the Transaction Details Window" in *Oracle Install Base Concepts and Procedures* and online help.

2

Implementation and Setup

2.1 Product Dependencies and Requirements

The following modules must be installed and set up for Install Base to work. Refer to the appropriate files and guides to install and set up these modules:

- Oracle Inventory
- Oracle Enterprise Install Base
- Oracle Service Fulfillment Manager
- Oracle Order Management
- Oracle Purchasing
- Oracle WIP
- Oracle BOM

2.2 Setup Checklist

The following table is a list of setup steps that must be completed.

Table 2–1 Setup Steps with Upgrade Information

Reference Number	Required	Step Title	Upgrade
1.	Yes	Confirm Inventory Setup	Upgraded
2.	Yes	Item Master	Upgraded
3.	Yes	Locations	Upgraded
4.	Yes	Parties	Upgraded

Table 2–1 Setup Steps with Upgrade Information

Reference Number	Required	Step Title	Upgrade
5.	Yes	Installation Parameters	Upgraded/Yes
6.	Seeded/optional	Party/Account Relationship Types	Seeded/ optional
7.	Seeded	Instance-to-Instance Relationship Types	Seeded
8.	Optional	Vendors	Optional
9.	Optional	Employees	Optional
10.	Yes	Party Accounts	Upgraded
11.	Yes	Party Contacts	Upgraded
12.	Seeded	Accounting Classification Codes	Seeded
13.	Optional	Instance Type Codes	Upgraded
14.	Seeded	Instance Location Source Codes	Seeded
15.	Seeded	Party Source	Seeded
16.	Seeded/optional	Instance-Organization Unit Relationship Types	Seeded/optional
17.	Seeded/optional	Version Labels	Upgraded
18.	Yes	System Type Codes	Upgraded
19.	Optional	Systems	Upgraded
20.	Optional	Product Split Reasons	Upgraded
21.	Seeded/optional	Instance Statuses	Upgraded
22.	Yes	Profile Options	Yes
23.	Yes	Responsibilities	Yes
24.	Optional	Descriptive Flex Fields	Optional
25.	Seeded/optional	Transaction Types	Upgraded/seeded/optional
26.	Seeded	Extended Attributes Levels	Seeded
27.	Optional	Extended Attributes	Optional

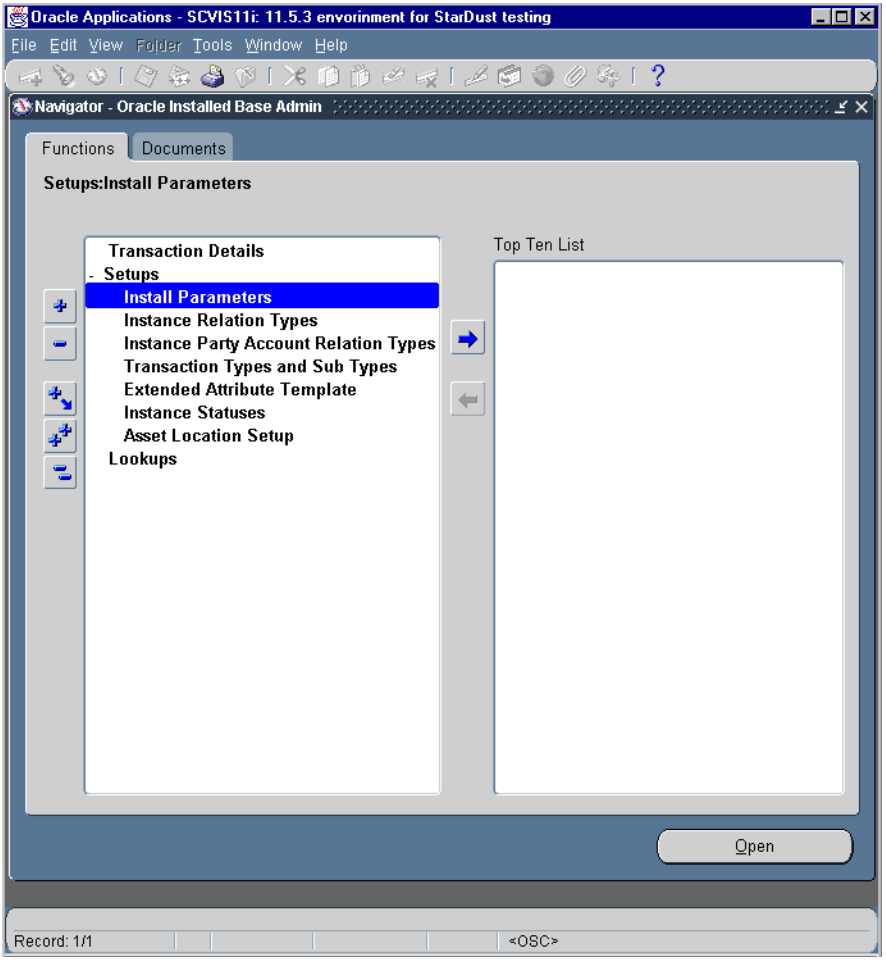
Table 2–1 Setup Steps with Upgrade Information

Reference Number	Required	Step Title	Upgrade
28.	Yes	Setup of Oracle Enterprise Install Base	Yes
29.	Yes	Setup of the Oracle Service Fulfillment Manager Advance Queue	Yes
30.	Yes	Menu setup of Oracle Order Management	Yes
31.	Yes	Order Management Line Type and Workflow	Yes
32.	Yes	Setup of background concurrent processes: Mass Edit, Term Line, Order Fulfillment Reroute	Yes

2.3 Setup Steps within Oracle Install Base

Most of these steps are performed through navigation to Install Base Setups and Lookups as shown in Figure 2–1.

Figure 2–1 Navigation for Install Base Setups



2.3.1 Set Up Installation Parameters

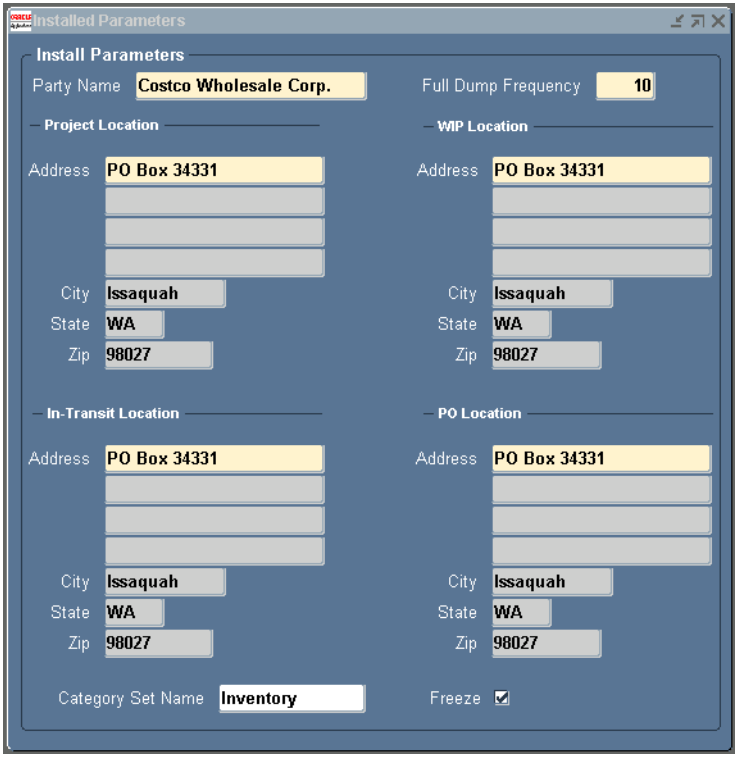
Install Base keeps a set of customer-specific installation parameters defined in the CSI_INSTALL_PARAMETERS table at setup time. This table contains exactly one row of parameters that is defined at application setup time. After they are defined, some of these parameters are allowed to change but not all.

The following table defines the set of parameters stored in the CSI_INSTALL_ PARAMETERS table

Table 2–2

Table Columns Name	Description	Change Allowed After Setup
INTERNAL_PARTY_ID	Internal Party ID defined for the Install Base organization.	No
PROJECT_LOCATION_ID	Location ID defined for Projects in HZ_LOCATIONS table.	No
WIP_LOCATION_ID	Location ID defined for WIP in HZ_LOCATIONS table.	No
IN_TRANSIT_ LOCATION_ID	Location ID defined for In-transit in HZ_LOCATIONS table.	No
PO_LOCATION_ID	Location ID defined for PO in HZ_LOCATIONS table.	No
HISTORY_FULL_DUMP_ FREQUENCY	Frequency of complete data dump for Install Base history.	One-time setup
CATEGORY_SET	Specifies the category set to be used in extended attribute setup	One-time setup

Figure 2–2 Install Parameters Window



2.3.2 Set Up Codes for Party-Account and Party-Contact Relationship Types

Install Base keeps the following set of relationship codes in the CSI_IPA_RELATION_TYPES table:

- Instance-Party Relationship Type Codes
- Party-Account Relationship Type Codes
- Party-Contact Type Codes

These relationship codes are user-extendible.

The following table defines the set of columns of the CSI_IPA_RELATION_TYPES table.

Table 2–3

Table Columns Name	Description
IPA_RELATION_TYPE_ CODE	The relationship code
PARTY_USE_FLAG	'Y' indicates that it is an instance-party relationship type.
ACCOUNT_USE_FLAG	'Y' indicates that it is a party-account relationship type.
CONTACT_USE_FLAG	'Y' indicates that it is a party contact type.

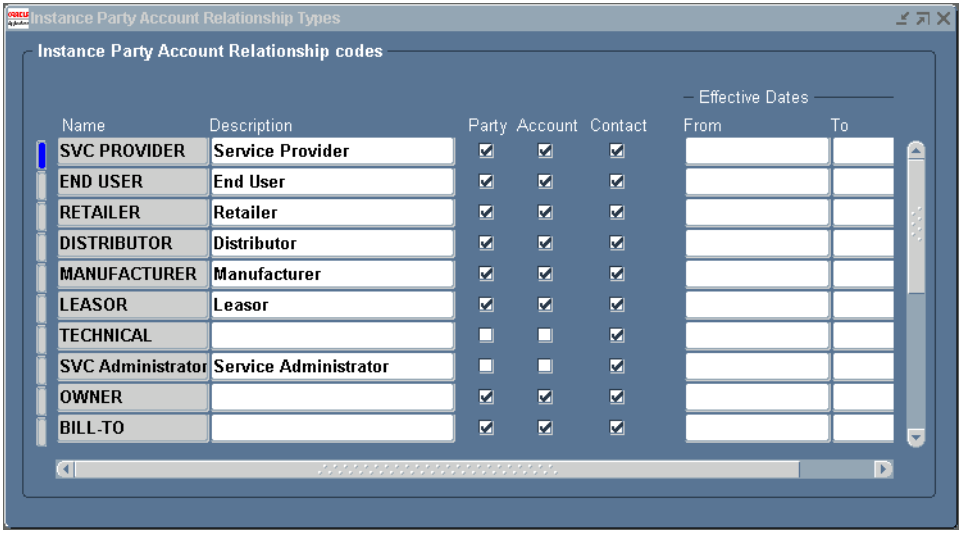
The following instance statuses are seeded in the CSI_IPA_RELATION_TYPES table:

Table 2–4

IPA_RELATIONSHIP_TYPE_ CODE	PARTY_USE_ FLAG	ACCOUNT_ USE_FLAG	CONTACT_ USE_FLAG
OWNER	Y	Y	N
BILL-TO	Y	Y	Y
SHIP-TO	Y	Y	Y
TECHNICAL	N	N	Y
SERVICE-ADMINISTRATION	N	N	Y

You can set up relationship type codes for Party, Account, and Contact by selecting the corresponding checkbox in the following setup window.

Figure 2–3 Window for Instance Party Account Relationship Codes



For more information about how to set up these codes, consult the *Oracle Customer Care Implementation Guide*.

2.3.3 Set Up Codes for Instance Relationship Types

Install Base keeps a set of relationship codes in the CSI_II_RELATION_TYPES table. These relationship codes are not user-extendible. The following table defines the set of columns of the CSI_II_RELATION_TYPES table.

Table 2–5

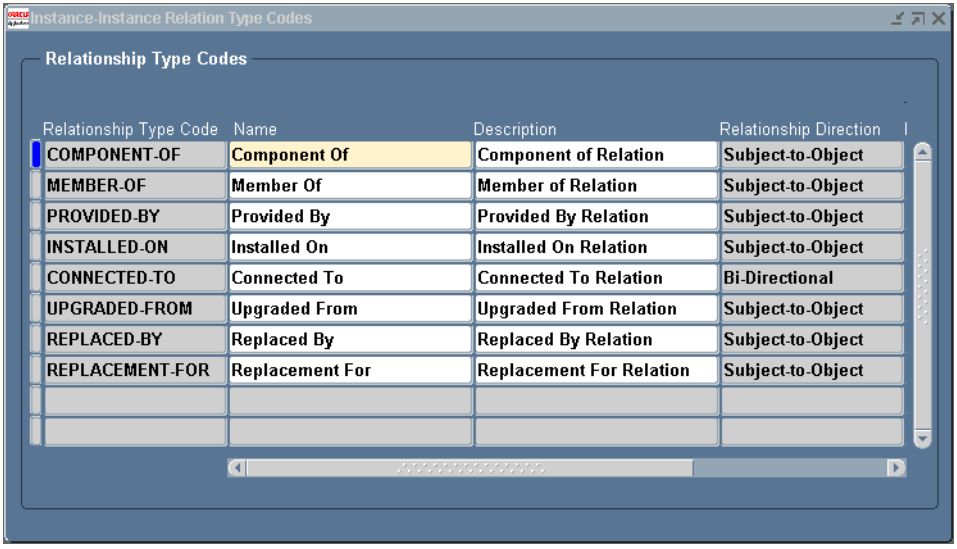
Table Columns Name	Description
RELATIONSHIP_TYPE_CODE	The relationship code
RELATIONSHIP_DIRECTION	The direction of interpreting the relationship

Seeded data are the only relationship type codes currently supported. Verify that the following instance statuses are seeded in the CSI_II_RELATION_TYPES table by checking the content of the Relationship Type Codes window.

Table 2–6

RELATIONSHIP_TYPE_ CODE	NAME	RELATIONSHIP_ DIRECTION
COMPONENT-OF	Component Of	Subject-to-Object
MEMBER-OF	Member Of	Subject-to-Object
PROVIDED-BY	Provided By	Subject-to-Object
INSTALLED-ON	Installed On	Subject-to-Object
CONNECTED-TO	Connected To	Bi-directional
UPGRADED-FROM	Upgraded From	Subject-to-Object
REPLACEMENT-FOR [for transaction only]	Replacement For	Subject-to-Object
REPLACED-BY [for transaction only]	Replaced By	Subject-to-Object

Figure 2–4 Relationship Type Codes Window



2.3.4 Verify Extended Attribute-Level Codes

Type: CSI Lookup

Lookup Type: CSI_IEA_LEVEL_CODE

Access Level: Non-Extensible

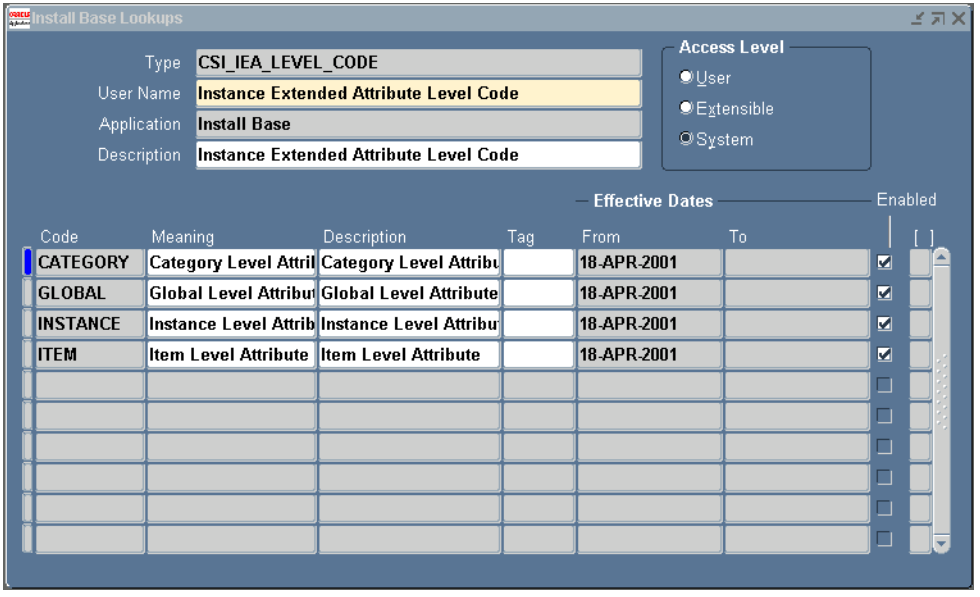
Verify that the following values are already seeded for CSI_IEA_LEVEL_CODE

Table 2–7

Lookup Code	Meaning	Description
GLOBAL	Global	Global Level Attribute
CATEGORY	Category	Category Level Attribute
ITEM	Item	Item Level Attribute
INSTANCE	Instance	Instance Level Attribute

This is a lookup. These are the extended attributes that are used in the Extended Attribute page of the application.

Figure 2–5 Lookups for Extended Attribute Level Codes



2.3.5 Set Up Extended Classifications (Optional)

Type: CSI Lookup

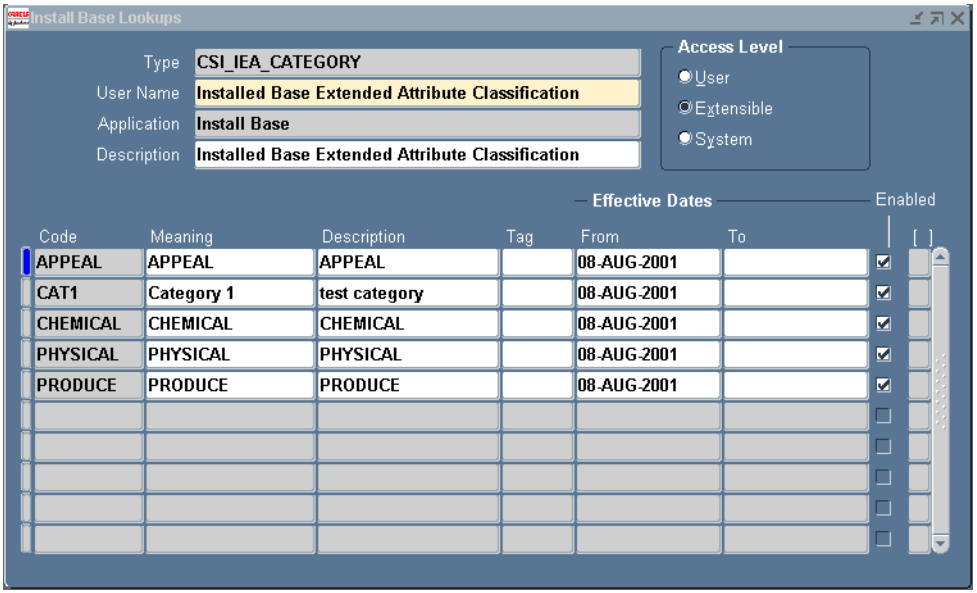
Lookup Type: CSI_IEA_CATEGORY

Access Level: Extensible

Values are not seeded for this code.

Optionally define extended attribute classifications such as chemical and physical.

Figure 2–6 Lookups for Extended Attribute Classifications



2.3.6 Set Up Extended Attribute Pools (Optional)

Type: CSI Lookup

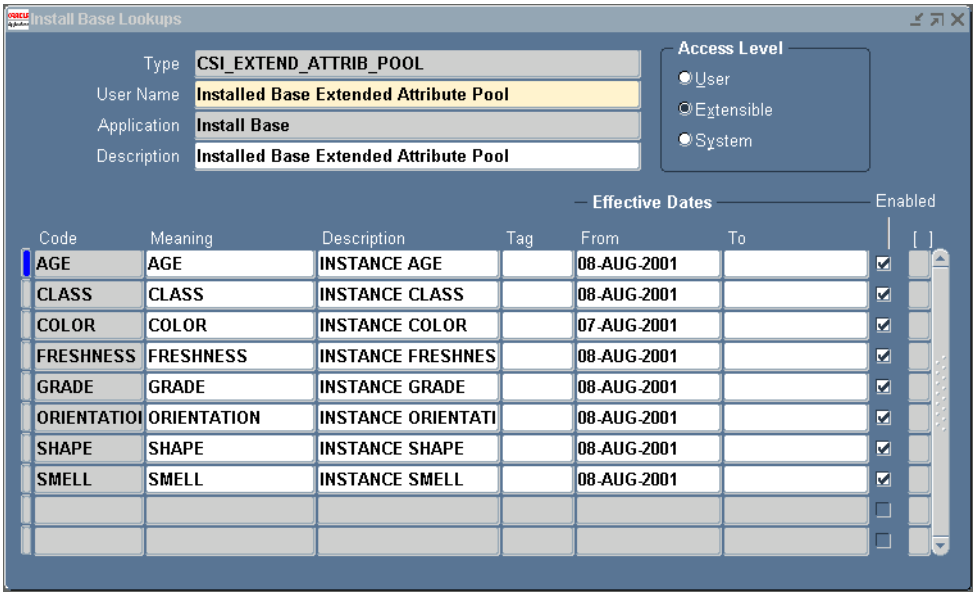
Lookup Type: CSI_EXTEND_ATTRIB_POOL

Access Level: Extensible

Values are not seeded for this code.

Optionally define extended attribute pools with code values such as color and grade.

Figure 2–7 Lookups for Extended Attribute Pool



2.3.7 Set Up Extended Attributes (Optional)

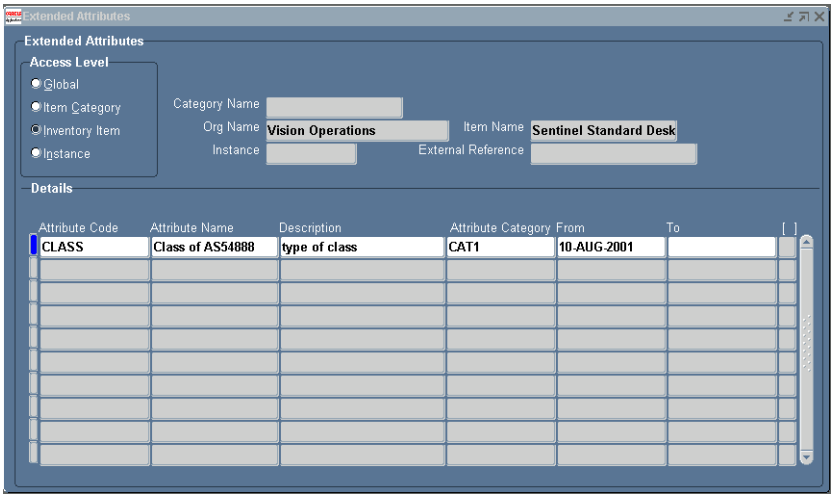
The extended attributes used for Install Base item instances must be defined in the CSI_I_EXTENDED_ATTRIBS table.

Four levels of extended attributes can be defined for Install Base items:

- Global: Global Level Extended Attributes are applicable to all the item instances in install Base.
- Item Category: Category level extended attributes are applicable to the items of the category for which the extended attributes are defined.
- Inventory Item: Item level extended attributes are applicable to all the instances of the item type for which the extended attribute is defined.
- Instance: Instance level extended attributes are applicable only to the instance for which the extended attribute is defined.

Use the Install Base Extended Attributes window to define these attributes.

Figure 2–8 Extended Attributes Window



2.3.8 Set Up Accounting Classification Codes

Type: CSI Lookup

Lookup Type: CSI_ACCOUNTING_CLASS_CODE

Access Level: Extensible

Verify that the following values are already seeded for CSI_ACCOUNTING_CLASS_CODE:

Table 2–8

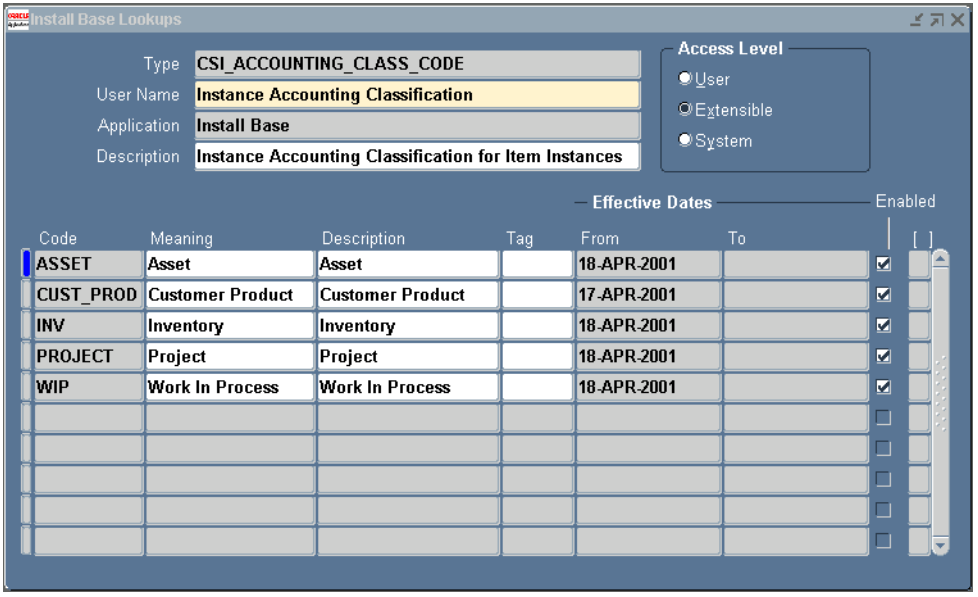
Lookup Code	Meaning	Description
INV	Inventory	Inventory
ASSET	Asset	Asset
WIP	Work In Process	Work In Process

Table 2–8

Lookup Code	Meaning	Description
PROJECT	Project	Project
CUST_PROD	Customer Product	Customer Product

Add any new accounting classification codes required by your organization.

Figure 2–9 Setup for Accounting Classification Codes



2.3.9 Set Up Instance Type Codes

Type: CSI Lookup

Lookup Type: CSI_INST_TYPE_CODE

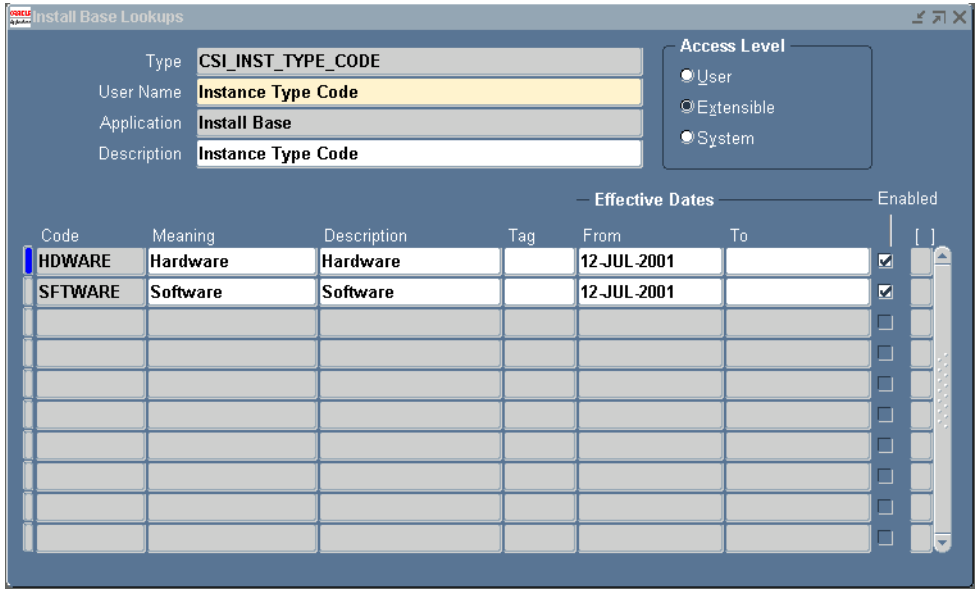
Access Level: Non-Extensible

No values are seeded for CSI_INST_TYPE_CODE.

Define the instance type codes used by your organization. Example of instance types are Hardware, Software, and Service.

You can enter any value. The type of product is used in the general attribute page in the application.

Figure 2–10 Setup of Instance Type Codes



2.3.10 Verify Codes for Instance Location Sources

Type: CSI Lookup

Lookup Type: CSI_INST_LOCATION_SOURCE_CODE

Access Level: Non-Extensible

Verify that the following values are already seeded for CSI_INST_LOCATION_SOURCE_CODE.

Table 2–9 Setup for Instance Location Source Codes

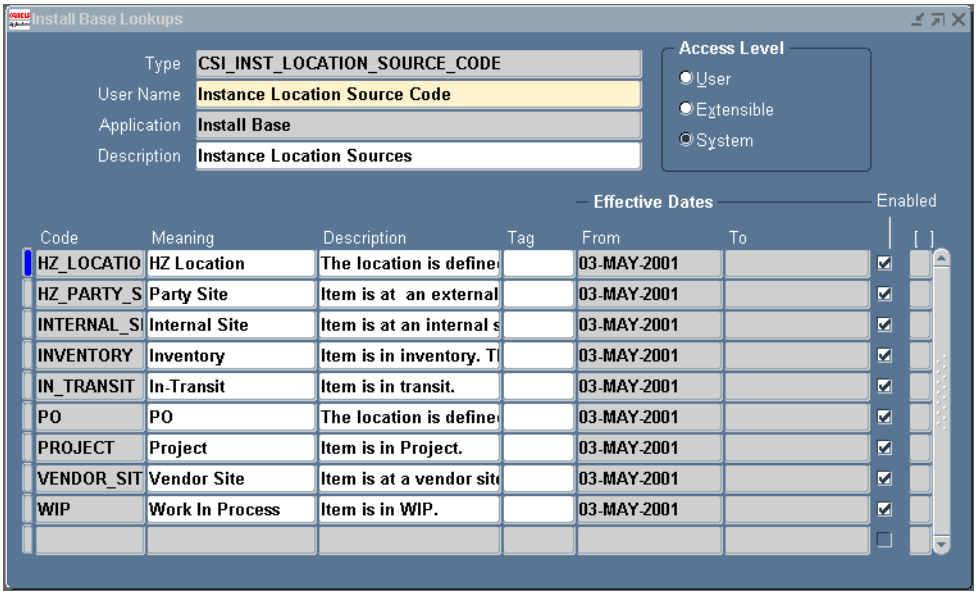
Lookup Code	Meaning	Description
HZ_LOCATIONS	HZ Location	The Location is defined in HZ_LOCATIONS table

Table 2–9 Setup for Instance Location Source Codes

Lookup Code	Meaning	Description
HZ_PARTY_SITES	HZ Party Site	Item is at an external party site. The location is defined in HZ_PARTY_SITES table.
INTERNAL_SITE	Internal Site	Item is at an internal site. The location is defined in HR_LOCATIONS table.
INVENTORY	Inventory	Item is in inventory.
IN_TRANSIT	In-Transit	Item is in Transit. Location is defined by in-transit order line ID.
PO	PO	Location is defined in PO_LINES_ALL table.
WIP	Work in Process	Item is in WIP.
PROJECT	Project	Item is in Project.
VENDOR_SITE	Vendor Site	Item is at a vendor site. Location is defined in PO_VENDOR_SITES_ALL table.

These values are not extensible.

Figure 2–11 Setup for Instance Location Source Codes



These are the different kinds of locations that a product can have.

2.3.11 Verify Party Sources

Type: CSI Lookup

Lookup Type: CSI_PARTY_SOURCE_TABLE

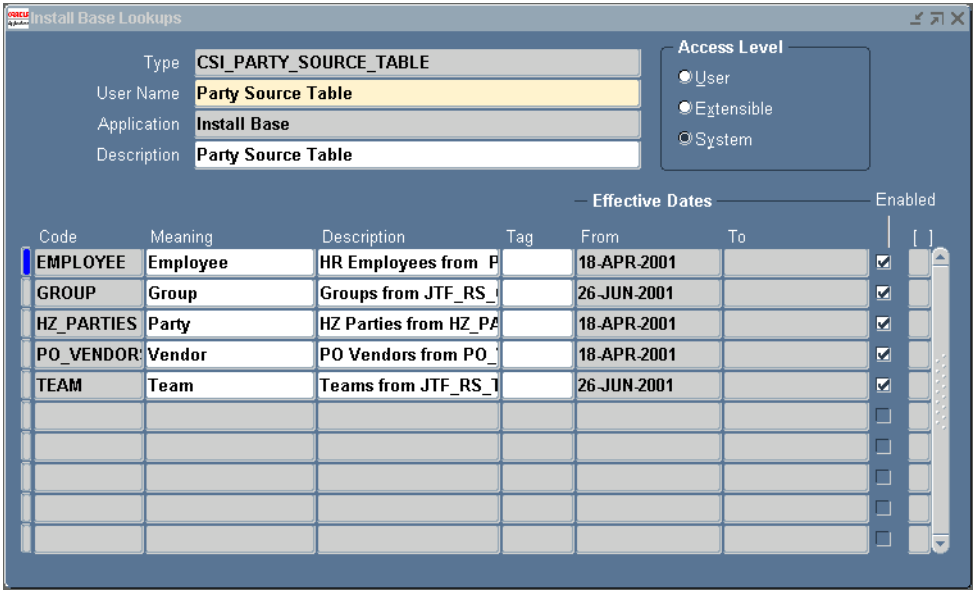
Access Level: Non-Extensible

Verify that the following values are already seeded for CSI_PARTY_SOURCE_TABLE.

Table 2–10

Lookup Code	Meaning	Description
HZ_PARTIES	HZ_PARTIES	Party is defined in HZ_PARTIES table.
PO_VENDORS	PO_VENDORS	Party is defined in PO_VENDORS table.
EMPLOYEE	HR Employee	Party is defined in Party is defined in PER_ALL_PEOPLE_F table.

Figure 2–12 Setup for Party Sources



2.3.12 Set Up Codes for Instance-Organization Unit Relationship Types

Type: CSI Lookup

Lookup Type: CSI_IO_RELATION_TYPE_CODE

Access Level: Non-Extensible

Verify that the following values are already seeded for the CSI_IO_RELATION_TYPE_CODE

Table 2–11

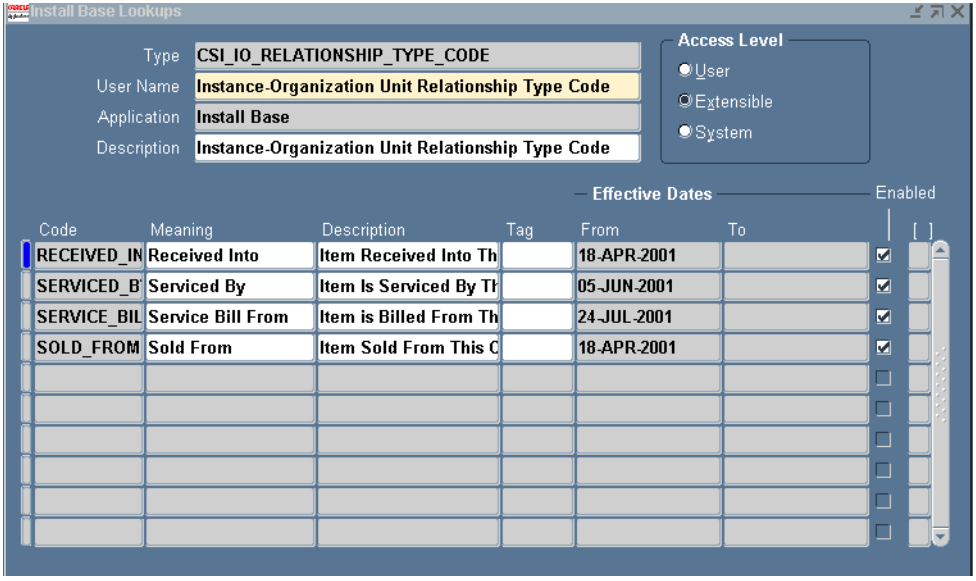
Lookup Code	Meaning	Description
RECEIVED_INTO	Received into	The Received Into item is received into this organization unit.
SERVICED_BY	Serviced by	The Serviced By item is serviced by this organization unit.
SOLD_FROM	Sold from	The item is sold from this organization unit.

Table 2–11

Lookup Code	Meaning	Description
SERVICE_BILLED_FROM	Service billed from	Organization that gets the credit from Billing.

Define new instance-to-operating units organization codes specific to your organization.

Figure 2–13 Setup of Instance-Organization Relationship Type Codes



2.3.13 Set Up System Type Codes

Type: CSI Lookup

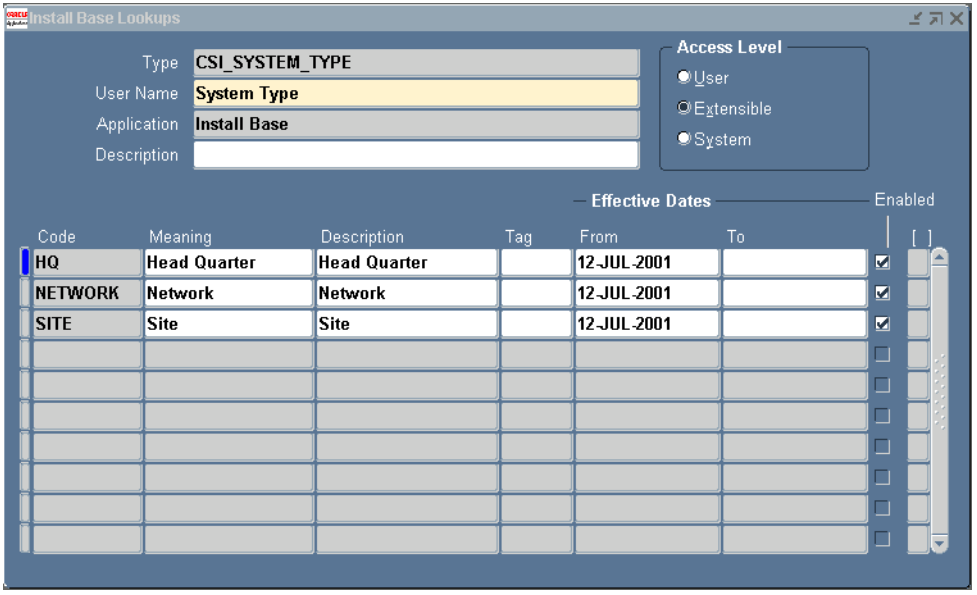
Lookup Type: CSI_SYSTEM_TYPE

Access Level: Extensible

No values are seeded for CSI_SYSTEM_TYPE.

Use the setup window to define system types to be used in your organization. They are used in the Systems page of the application to define systems.

Figure 2–14 Setup of System Types



2.3.14 Set Up Systems

The systems associated with Install Base item instances must be defined in the CSI_SYSTEMS table.

Systems should be defined using the Install Base setup window.

2.3.15 Set Up Version Labels

Type: CSI Lookup

Lookup Type: CSI_INSTANCE_VERSION_LABELS

Access Level: Extensible

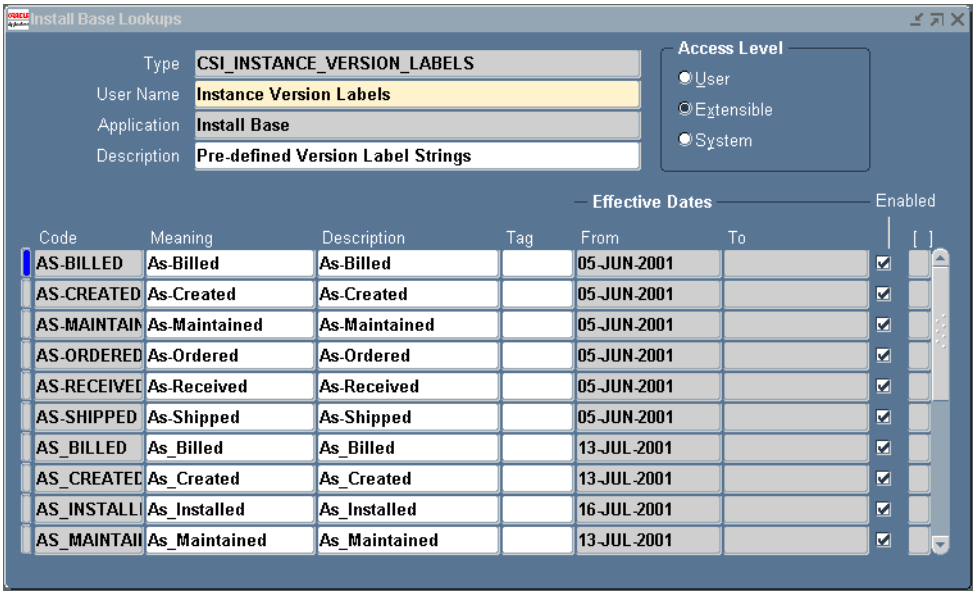
Verify that the following values are already seeded for CSI_INSTANCE_VERSION_LABELS.

Table 2–12 Setup of Version Labels

Lookup Code	Meaning	Description
AS-CREATED	As-Created	As-Created
AS-MAINTAINED	As-Maintained	As-Maintained
AS-ORDERED	As-Ordered	As-Ordered

Define new version label codes to be used in your organization.

Figure 2–15 Lookups for Version Labels



2.3.16 Set Up Split Process Reasons

Type: CSI Lookup

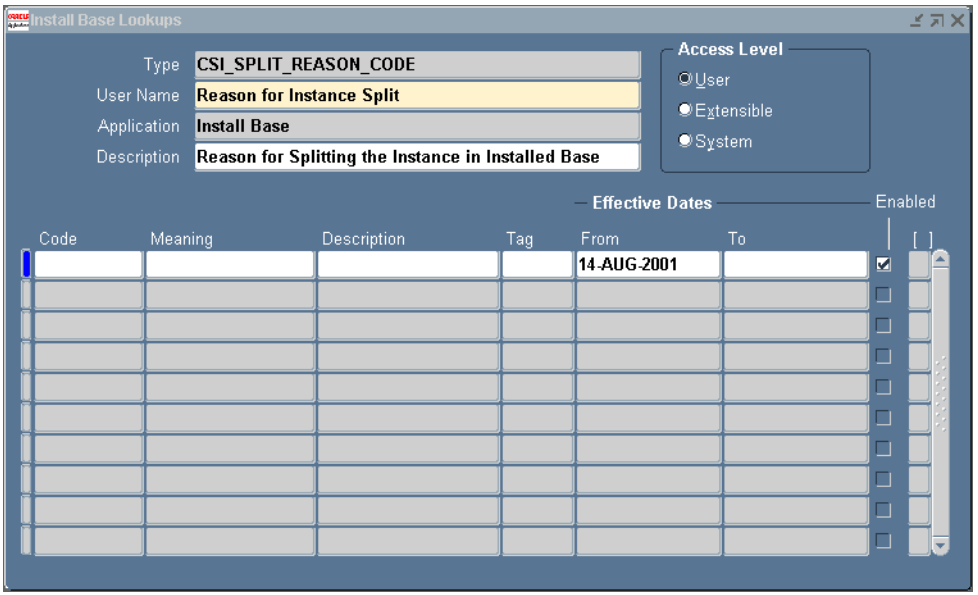
Lookup Type: CSI_SPLIT_REASON_CODE

Access Level: Extensible

No values are seeded for CSI_SPLIT_REASON_CODE

Define split reasons to be used in your organization.

Figure 2–16 Setup of Split Reason Codes



2.3.17 Set Up Instance Statuses

Install Base keeps a set of instance statuses defined in the CSI_INSTANCE_ STATUSES table. Instance statuses are user-extendible and are defined using a combination of settable flags.

The following table defines the set of columns of the CSI_INSTANCE_STATUSES table.

Table 2–13 CSI Instance Statuses

Name	Terminate	Status Change Allowed	Service Allowed	Request Allowed	predefined	Updatable
Expired	Y	Y	N	N	Y	N

Latest	N	Y	Y	Y	Y	N
Upgraded	N	Y	Y	Y	Y	N
Created	N	Y	Y	Y	Y	N
Replaced	N	N	N	N	Y	N
Updated	N	Y	Y	Y	Y	N
Returned for Repair	N	Y	Y	N	Y	N
Returned for Upgrade	N	Y	Y	N	Y	N
Repaired	N	Y	Y	Y	Y	N
Replacement	N	Y	Y	Y	Y	N
Return for Replacement	Y	Y	N	N	Y	N
Replaced - No Return	Y	Y	N	N	Y	N
Spare Part	N	Y	Y	Y	Y	N
Returned for Credit	N	Y	N	N	Y	N
Loaner	N	Y	N	Y	Y	N
Returned Loaner	N	Y	N	N	Y	N

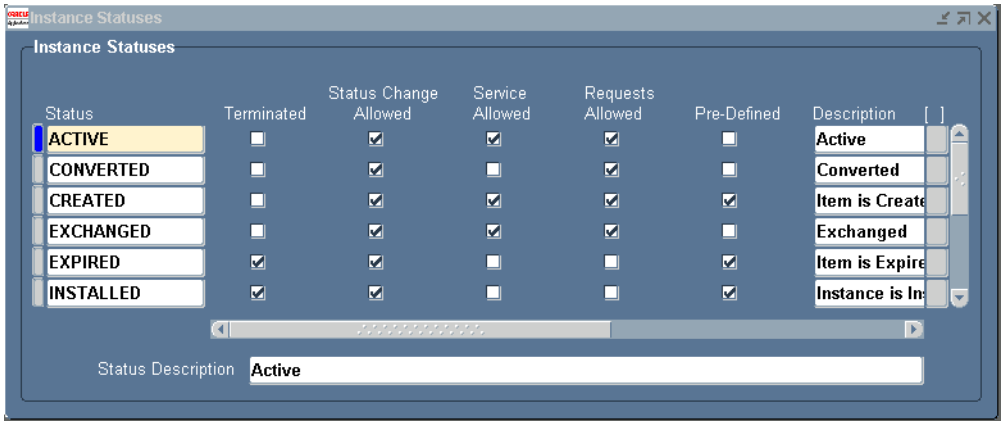
There are 16 seeded statuses.

The meaning of the flags is as follows:

- Terminated: Sets the instance to be terminated.
- Status Change Allowed: The status can be changed for an instance currently bearing this status.
- Service Allowed: Service contract can be applied to the instance with this status.
- Requests Allowed: Service request can be created for an instance with this status.

- Pre-Defined: Seeded
- Updatable: The flags on this status can be updated

Figure 2–17 Instance Statuses Window



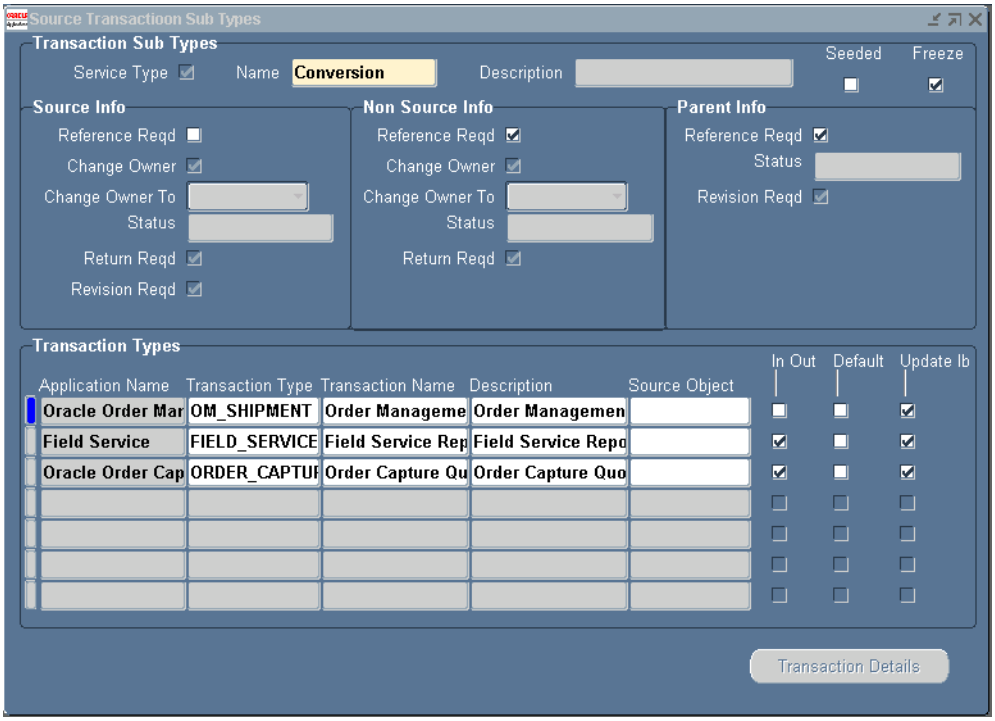
2.3.18 Set Up Transaction Types and Transaction Subtypes

Transaction types and subtypes are used to specify the kinds of transactions that the interface program can use. The main purpose of the Source Transactions Sub Types window is to specify what kind of update can be done to an Install Base instance when transactions come from either ERP or CRM. For this release the data comes from Order Management, Field service, and Order Capture. In Order Management you can go into the transaction relation details to pick one of the transactions being defined here. Here you define these transactions and the kind of actions they can perform on the source instance, the non-source instance, and the parent instance.

If Service Type is selected, thent the sub type name comes from CRM and the transaction billing type setup in Service.

If Service Type is not selected, then the sub type name comes from the Transaction Types region of this window.

Figure 2–18 Source Transaction Sub Types Window



2.3.18.1 Window Regions

Transaction Sub Types Region

This is where the name of the transaction sub type is selected. If Service Type is not selected, then the LOV comes from the Transaction Type setup in the Install Base setup. If Service Type is selected, then the LOV comes from Billing Transaction Types in the Service setup.

Some definitions:

- Seeded: For seeded transaction sub types, this will be selected.
- Freeze: If selected, then no changes are allowed after it is created.

Source Info, Non Source Info, and Parent Info Regions

You can specify the transaction types in three regions:

- Source Info: About the instance being transacted, such as in a sales order as a shipped item or a returned item.
- Non Source Info: About a related instance, such as one that is being replaced by the source instance.
- Parent Info: About actions to be done to the parent instance if the source instance is in a configuration.

Source Info Region for the Instance Being Transacted

If the Reference Reqd is selected, then enter the Install Base reference number.

If Change Owner is selected, then the application will change the owner.

A changed owner can be external or internal. Internal changes the ownership back to the organization. External ownership refers to the customer.

The Status field is used to change the status. When the transaction is processed, then the application updates Install Base to that status.

If Return Reqd is selected, then you are expecting a return. For example, the Return Reqd checkbox is selected for a loaner.

If Revision Reqd is selected, then you are expecting a revision.

Non Source Region for the Related Instance

An example of a related instance is one that is being replaced by the source instance.

The field definitions in this region are the same as those in the Source Info region.

Parent Information

If this part is a component of another, then you need to change the instance-to-instance relationship. This changes the relationship of the parent to the child.

The field definitions in this region are the same as those in the Source Info region.

Transaction Types Region

In this region you pick the souce application from which the transaction being defined comes. Examples are Order Management and Field Service.

InUpdate Ib: Indicates whether this transaction affects Installed base or not.

Default: Sets the transaction to be the default transaction for the selected application.

In Out: Will be taken out if selected.

2.3.19 Verify Transaction Status Codes

Type: CSI Lookup

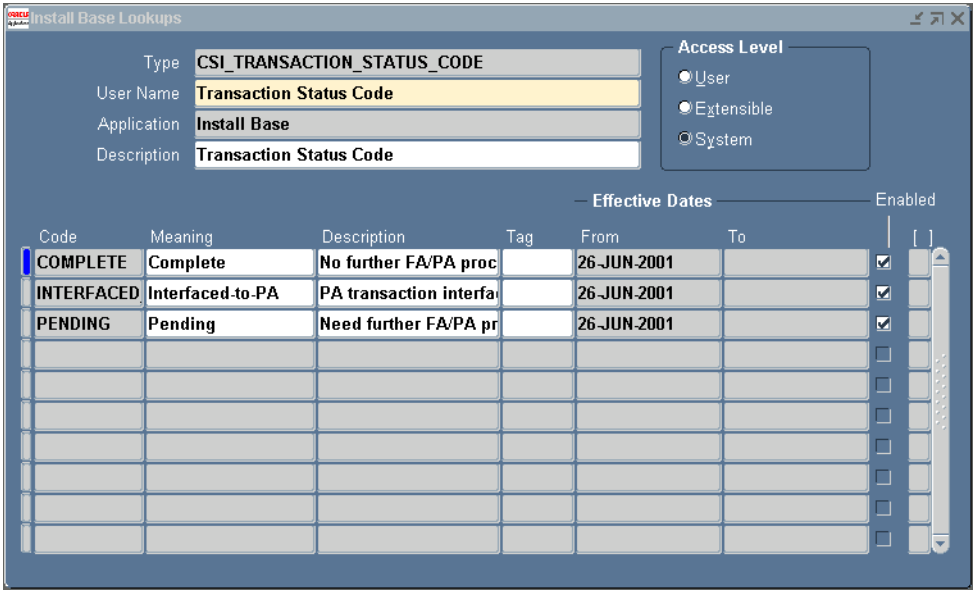
Lookup Type: CSI_TRANSACTION_STATUS_CODE

Access Level: System

Values are seeded for this code.

Whenever an interface transaction comes from an application such as Order Management, then the codes used in the interface transaction come from here.

Figure 2–19 Lookups for Transaction Status Codes



2.3.20 Verify Transaction Error Source Types

Type: CSI Lookup

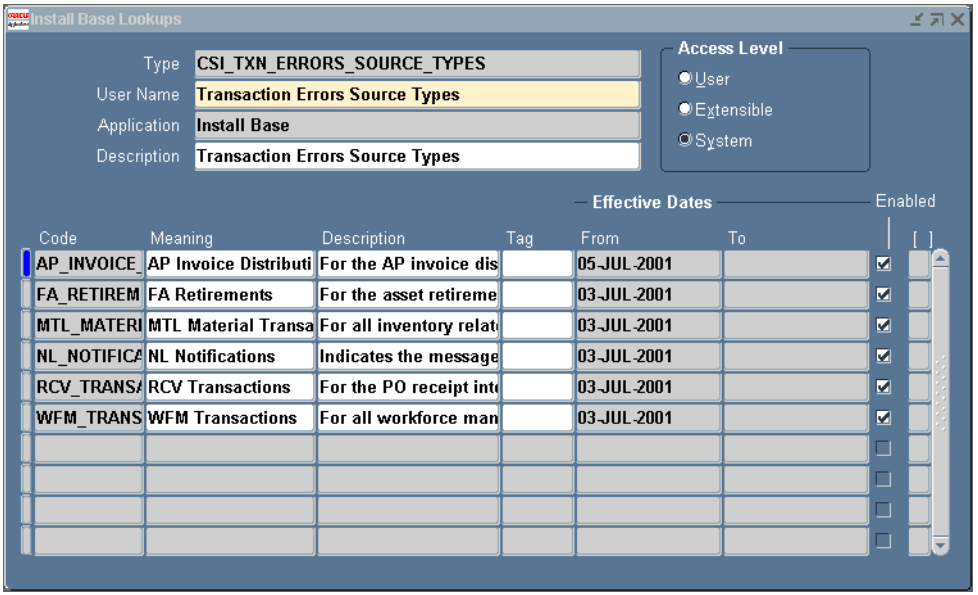
Lookup Type: CSI_TXN_ERRORS_SOURCE_TYPES

Access Level: System

Values are seeded for this code.

The processing of the error table uses this code to indicate where an error is.

Figure 2–20 Lookups for Transaction Error Source Types



2.4 Related Setup Steps within Oracle Enterprise Install Base

2.4.1 Set Up Asset Locations

Type: CSI Lookup

Assets referenced in Install Base have a physical location and an asset location. These asset locations related to Install Base item instances must be defined in the CSI_A_LOCATIONS table.

Asset locations should be defined using Enterprise Install Base setup windows.

For information on how to set up Asset Location types, refer to the *Oracle Enterprise Installed Base Implementation Guide*. Also refer to that guide for information on setting up the following:

- Asset location sources
- Instance usage codes
- CSI_TXN_ERRORS_SOURCE types

2.4.2 Verify Location IDs in HZ_LOCATIONS

The following locations need to be defined in the HZ_LOCATIONS table before using it in Install Base:

Table 2–14

Location	Description
Project	A fixed location ID defined for Projects in HZ_LOCATIONS table.
WIP	A fixed location ID defined for WIP in HZ_LOCATIONS table.
IN_TRANSIT	A fixed location ID defined for In-transit in HZ_LOCATIONS table.
PO	A fixed location ID defined for PO in HZ_LOCATIONS table.

These fixed location ids must be defined in HZ_LOCATIONS first before setting up the Installation Parameters in a later step. For more information about how to set up locations, consult the *Oracle Customer Care Implementation Guide*.

2.4.3 Set Up Codes for Asset Update Statuses

Type: CSI Lookup

Lookup Type: CSI_ASSET_UPDATE_STATUS

Access Level: Extensible

Verify that the following values are already seeded for CSI_ASSET_UPDATE_STATUS.

Table 2–15

Lookup Code	Meaning	Description
IN-SERVICE	In-Service	In-Service
RETIRED	Retired	Retired

Define new asset update assets codes to be used in your organization. Refer to the *Oracle Enterprise Installed Base Implementation Guide* for details.

2.5 Related Setup Steps within Other Oracle Applications

2.5.1 Verify Inventory Setup

Make sure that you set up Inventory as described in "Overview of Setting Up" in the *Oracle Inventory User's Guide*.

2.5.2 Set Up Items in the Item Master

All items that need to be tracked in Oracle Install Base (IB) and Enterprise Install Base (NL) need to be set up as IB Trackable, whether they are tangible, inventory-transactable, shippable items such as a computer or intangible, non-inventory-transactable, non-shippable items such as a license. An item can either be NL_trackable or a service item such as a contract. It cannot be both.

An item has to be set up in the global master item, and it needs to be assigned to the inventory organizations that use it.

For a warranty to be created for a product instance, the service item of the contract needs to be part of the BOM of the top assembly item.

Instances can be created online and through interfaces such as Inventory receipt.

Refer to Section 1.4.2, "ERP-Install Base Integration" for information about instance creation through integration.

For more information about how to set up items in Item Master, consult Oracle Inventory implementation guides.

2.5.3 Set Up Parties

The parties associated with item instances in Install Base need to be defined in HZ_PARTIES first.

For more information about how to set up parties, consult the *Oracle Accounts Receivable Implementation Guide*.

2.5.4 Set Up Vendors

The vendor parties associated with item instances in Install Base need to be defined in PO_VENDORS first. For more information about how to setup vendors, please consult Oracle Purchasing implementation manuals.

2.5.5 Set Up Employees

Employees can be associated with Install Base item instances as parties. To do so, the employee must be defined in HR tables first.

For more information about how to set up vendors, consult Oracle Human Resources Applications implementation guides.

2.5.6 Set Up Party Accounts

The parties associated with item instances in Install Base can have a number of accounts associated with them. These accounts need to be defined in the HZ_CUST_ACCOUNTS table before referencing them in install Base.

For more information about how to set up party accounts, consult the *Oracle Accounts Receivable Implementation Guide*.

2.5.7 Set Up Party Contacts

Install Base can maintain the contacts to parties associated with item instances. These contacts to parties must be defined in the HZ_PARTIES table using the Contact Center window before referencing them in Install Base.

For more information about how to set up party contacts, consult the *Oracle Accounts Receivable Implementation Guide*.

2.5.8 Create Users and Assign Roles and Responsibilities

Use this procedure to create a business user.

1. Login to jtflogin as sysadmin.
2. Navigate User Management Tab > Users > Create User.
3. Fill in the details

4. Select the user type as Business User.
5. Select that you already have a company, and select one of the companies listed (Preferably Business World).
6. Click Submit. Now you are back on the Users Page.

Approve and Assign Accounts

7. Select the Pending Approvals link.
8. Click on the user you just created.
9. Click Assign accounts, and select some or all of the accounts listed for the user and click Submit.
10. Optionally, click Approve on the Pending approvals page, enter comments, and click Submit.

Assign Role

11. Search for the user you just approved, and click on the user name.
12. Click the Roles button.
13. Move the role CSI_END_USER from the LHS List box to the right hand side using the single arrow button.
14. Click Submit to assign the role to the user

Assign Responsibility

15. Login to Forms, and switch to SYSADMIN responsibility
16. Select Security -> User in the navigator.
17. Enter the user name (csiuser) and password
18. Add the responsibility, Oracle Installed Base Customer, and any other responsibility that you might need for this user.
19. Please note the Responsibility Id of the above from this line itself.

Set up Default Responsibility and Application ID.

20. In the navigator, Profiles > System Query JTF% for user name specified above.
21. Set the User profile value for the following:

    JTF_DEFAULT_APPLICATION_ID to 542

    JTF_DEFAULT_RESPONSIBILITY to the responsibility ID that you obtained above

22. Quit the forms window.
23. Log in to the jtflogin with the user name and password, and everything should be set.

    The accounts that you assigned in step 8 should be what will show up as the list of accounts associated with this user in the customer UI. Note that it may be a subset because JTF shows all accounts regardless of active/inactive status whereas the Install Base window shows only the active accounts that are associated with this user.

2.5.9 Create an Agent User

Use this procedure to create an agent user.

1. Login to jtflogin as sysadmin
2. Use management Tab > Users > Create user. Fill in the details.
3. Select the user type as Individual User
4. Click Submit. Now you are back on the user page.
5. Search for the user you just created, and click on the user name.
6. Click Roles.
7. Move the CSI_NORMAL_USER from the list box to the right hand side, using the single arrow button.
8. Click Submit to assign the role to the user.
9. Login to Forms, and select the SYADMIN responsibility.
10. Select Security > User in the navigator.
11. Enter the user name (as in Step 1) and password.
12. Add the responsibility `Oracle Installed Base User` and any other responsibility such as `Oracle Installed Base Administrator` to the user.
13. Please note the responsibility ID of the from the `Oracle Installed Base User` line itself.
14. Navigate to Profiles > System. Query JFT% for the user name specified earlier.
15. Set the user profile values for the following:
    - JTF_DEFAULT_APPLICAION_ID to 542

- JTF_DEFAULT_RESPONSIBILITY to the responsibility ID from step 13.

16. Quit the Forms window.

2.5.10 Set Up Oracle Enterprise Install Base

For instructions on setting up the Oracle Enterprise Install Base, refer to the *Oracle Enterprise Installed Base Implementation Guide.*

2.5.11 Set Up Oracle Service Fulfillment Manager Advance Queue

For instructions on setting up the Oracle Service Fulfillment Manager Advance Queue, refer to the *Oracle Service Fulfillment Manager Implementation Guide.*

2.5.12 Set Up Transaction Detail in the Order management Menu

1. Log on to Oracle Applications under the System Administrator responsibility.
2. Choose the sub-option Menu under option Applications.
3. Click Enter Query (or Choose View -> Query By Example -> Enter option).
4. Enter the string ONT_SALES_ORDERS for the Menu field, and click Execute Query (or Choose View -> Query By Example -> Run option).
5. Go to the last record in the multi-record details block
6. Create a new record with the following Field Values:

   Seq: Choose the next sequence

   Function: Select Installed Base Transaction Details from the list of values.
7. Save the record.

3

Configuring Oracle Install Base System Profile Options

3.1 Oracle Install Base System Profile Options Defined

Table 3–1 describes the profile options for Oracle Install Base.

Table 3–1 Profile Options for Oracle install Base

Name	User Profile Name	Description
CSI_AUTO_GEN_SYS_ NAME	Auto-Generate System Name	Generate the System Name from the sequence (same as the system id)
CSI_SYS_NAME_UPD_ ALLOWED	System name Update allowed	Is update of System name allowed, once it's created
CSI_CASCADE_SYS_ TERMINATE	Cascade System Termination	When the system is terminated, also terminate all Instances which are grouped within this system
CSI_PROP_SYS_ CHANGES	Propagate System Changes	Propagate any system changes to the Instances grouped in it
CSI_AUTO_SPLIT_ INSTANCE	Auto-Split Products During Instantiation	Split the Instance into multiple instances of Quantity one each.
CSI_DEFAULT_ INSTANCE_STATUS	Default Status of Instantiated Products	Default status code assigned to item instances.
CSI_DEFAULT_ VERSION_LABEL	Default Version Label of the Instance	Default Version label that should be assigned for outbound transactions

Table 3–1 Profile Options for Oracle install Base

Name	User Profile Name	Description
CSI_EXPLODE_BOM	Explode the Bills Of Materials for the Item	Explode the Bills Of Materials for the Inventory Item.
CSI_ENABLE_SQL_ TRACE	Trace Enabled	Indicates whether the APIs enable the session trace option before executing the code.
CSI_DEBUG_LEVEL	Debug Level	Allowed Values are 0,1,2 and 3.0 - Lowest Level (No debug messages)3 - Highest level
CSI_INSTANCE_ TERMINATION_ STATUS	Default Termination Status	Default Termination Status
CSI_OE_LINE_ PROCESSING_DELAY	Delay between Order Line Processing	Delay between Order Line Processing
CSI_DISPLAY_HTML_ UI	Option to use the Install Base html UI for other products	Option to use the Install Base html UI for other products
SERVICE_MASTER_ INVENTORY_ VALIDATION_ORG - INV	Master Validation organization	Master Validation organization
CSI_STOP_AT_ DEBUG_ERROR	Debug option to stop at an error	Debug option to stop at an error
CSI_LOGFILE_NAME	Name of the Debug logfile	Name of the Debug logfile
CSI_LOGFILE_PATH	The 'utl_file_dir' parameter in init.ora	The 'utl_file_dir' parameter in init.ora

3.2 Verifying Debug Options

Oracle Install Base provides an option to log debug information in a log file. By default, the debug feature is turned off. To turn the debug option off, change the profile option CSI_DEBUG_LEVEL value to 0.

To turn the debug option on, perform the following steps:

1. Change the value of profile option CSI_DEBUG_LEVEL to either 1,2, or 3.

2. Specify the value of the profile option CSI_LOGFILE_PATH to be the path of the directory on server side where the log file should be written.

   You must choose the log file path from the list of paths defined for the parameter utl_file_di in the init.ora file. Alternatively, you can run the sql statement "SELECT value FROM v$parameter WHERE name = 'utl_file_dir'".

3. Specify the value of profile option CSI_LOGFILE_NAME to be the name you want to give to the log file.

   The specified log file will be written in the CSI_LOGFILE_PATH directory on the server side, and all debug messages will be written to this file. Each message in the log file will have the session ID and username attached to it.

3.3 Upgrade Notes

3.3.1 Handling Data Upgrade Errors

Verify the following reports found in <**Patch-Number**> directory.

The report file names are:

1. CSI_PRE_MIG_REPORT.lst

   This report can be reproduced using the following command if required:

   ```
   $ sqlplus <apps_user>/<apps_pwd> @$CSI_TOP/patch/115/sql/csiprrpt.sql
   ```

   The report contains the following checks and needs to be verified :

   - Count for csi transaction type should be 1.
   - Count for verifying track able flag should be 0
   - Count for verifying length of revision should be 0
   - Count for error log should be 0
   - Check profile value for “Service: CS to CSI Migrate Party Audit Data”. It should be Yes or No values.
   - Check profile value for “Service: CS to CSI Migrate Customer Products Audit Data”. It should be Yes or No values.
   - Check profile value for “Service: CS to CSI Migrate Systems All Audit Data”. It should be Yes or No values.
   - Check profile value for “Service: Inventory Validation Organization”. This should not be NULL.

2. CSI_POST_MIG_REPORT.lst

   This report could be reproduced using the following command if required:

   ```
   $ sqlplus <apps_user>/<apps_pwd> @$CSI_TOP/patch/115/sql/csiporpt.sql
   ```

   The reports contains all the errors encountered during data upgrade. Correct all the errors before moving forward. After analysis, if you still want to continue, you can run the following script which will set the profile option “Service: CS to CSI Continue Migration with Errors” to “Yes”. The following is the command line :

   ```
   $ sqlplus <apps_user>/<apps_pwd> @$CSI_
   TOP/patch/115/sql/csiupdpf.sql
   ```

   WARNING : After you run this script and continue with the patch, you will not be able to migrate any un-migrated data. If you do not want this to happen, then fix all errors and rerun the driver without running the above script.