Oracle® Install Base

Concepts and Procedures

Release 11*i*

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Oracle Install Base Concepts and Procedures, Release 11*i*

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Preface

Audience for This Guide

Welcome to Release 11*i* of the *Oracle Install Base Concepts and Procedures*.

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

- The principles and customary practices of your business area.
- Oracle Install Base

  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, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

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How To Use This Guide

This document contains the information you need to understand and use Oracle Install Base.

- Chapter 1 provides overviews of the application, its features, functions, and integration points with other applications.
- Chapter 2 provides information about starting the application, accessing its initial pages, and using features that appear throughout it.
- Chapter 3 provides procedures for locating and building products and associating them with assets, parties, pricing data, counters, contracts, transactions, service requests, and repair orders.
- Chapter 4 provides procedures for defining transaction search criteria and viewing the results.
- Chapter 5 provides procedures to view and define systems, which are constructs that owners of products can define to group their products.
- Chapter 6 describes the window used to specify the transaction type used for updating a source instance and non-source instance. A new system can also be created for the instance from this window.

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 Install Base Implementation Guide

This guide provides information for setting up the contents of many of the lists of values (LOV) that you see in the application.

Oracle Enterprise Install Base Concepts and Procedures

Refer to this guide for information about Oracle Install Base's connections to ERP applications.

Oracle Service Concepts and Procedures

This guide provides information about supporting applications for all Oracle Service applications. The Counters sections explain how to define and use the counters that you can adjust in Oracle Install Base.

Oracle Inventory User's Guide

This guide provides information about the proper classification of items so that they can flow properly into Oracle Install Base.

Oracle Order Management User's Guide

Refer to this guide to get a better understanding how products flow into Oracle Install Base.

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.

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.

Oracl*eMetaLink*

Oracl*eMetaLink* 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 Oracl*eMetaLin*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 Oracl*eMetaLink* 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, updating, querying, and copying of instances through Install Base user interfaces and through integration with other applications. These include CRM applications such as Field Service and Depot Repair and ERP applications 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. For each party type, you can define relationship types such as Owner and Service Provider. Each party can have multiple accounts. This feature supports the multiple business relationships for today's businesses globalization and outsourcing requirements.

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 relationships or product configurations that can exist between instances such as component-of, member-of, connected-to. It also supports the creation of a component-of structure at the time of instance creation from Bill of Materials (BOM).

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 Life Cycle Tracking in Install Base

Install Base instances of IB trackable, shippable items get created when an item is received into inventory, through inventory receipt, miscellaneous receipt, purchase order receipt, and so on. When an inventory receipt transaction is processed, a message is sent to the Oracle Service Fulfillment Manager (SFM) advanced queue. It is automatically de-queued and processed by the Install base interface process to update Install Base. The instance bears the owner of the internal organization, with a location in an inventory organization and a subinventory/locator.

Any subsequent movement in inventory, such as transfer, issues, and adjustments, will be captured and reflected in Install Base through the SFM queue and the Install Base interface process.

At the time of sales order shipment or sales order RMA receipt, the inventory transaction triggered by the shipment transaction or RMA receipt is processed to update the existing instance in Install Base.

For non-shippable items, the sales order line fulfillment transaction triggers the creation of an instance in Install Base by the SFM queue and the Install Base interface process.

At the time of Sales Order line creation, the Install Base transaction detail can be used to define other attributes to update the instance, such as the change of ownership and location. You can enter multiple party and account relationships, extended attributes, contact information, system information, and so on. These will update the Installed Base instance when it is accessed.

1.3.8 Sales Order Shipment, Fulfillment, and RMA Receipt Interface

The Order Management to Installed Base Interface is described as follows:

1. Shipped Order Lines, RMA Receipt Order Lines (shippable items)

When an order line is shipped or RMA received and the corresponding inventory transaction is processed, a message is sent to the SFM advanced queue. It is automatically de-queued and processed to update Install Base.

A sales order shipment generates an Inventory Issue material transaction in the Inventory module. Because Install Base also tracks the internal inventory for trackable items, the instance exists already in Install Base. A shipment can cause a change of location and ownership depending on the Install Base transaction type being used, to the instance.

A sales order Return line provides for an Inventory receipt material transaction in the Inventory module. Because the Install Base instance already exists for the item being returned, a receipt can trigger an update of the specified instance, depending on the Install Base transaction type being used.

2. Fulfilled Order Lines (non-shippable items)

When an order line is fulfilled, the order line generic workflow sends a message to the SFM advanced queue. It is automatically de-queued and processed to create an instance in Install Base.

The Install Base interface processes additional Install Base tracked details that are entered in the transaction detail.

1.3.9 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.

1.3.10 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 Services 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

1.4.2 ERP Integration

Oracle Install Base has the following integration points with Oracle Applications (ERP):

- Inventory Receive and Transactions
- Purchase Order Receive, Order Management RMA Receive
- Order Management Shipping and Fulfillment
- Fixed Assets
- Projects
- Work in Process

2

Basics of Oracle Install Base

2.1 Accessing Oracle Install Base

You access Oracle Install Base as follows:

1. Using the path provided by your local system administrator, navigate to the Welcome to Oracle *e*Business Suite page.
2. If you have not already obtained a registered and approved login, click Register Here to register.
3. After you have an approved login, in the Welcome to Oracle *e*Business Suite page, enter your login and password.
4. Click Go.

   The Search Products page appears under the Products main tab and the Products subtab.

   If you are an outside customer, the Welcome to Oracle Install Base page appears. Select an account number from the list of values presented to you and click Go to activate the application with information appropriate for this account. The information is a subset of that which is described in the rest of Concepts and Procedures for this application.

2.2 The Products Tabbed Page

In Oracle Install Base all pages are organized under the Products tab with the following subtabs:

Products

Some of the activities that you can perform here are search for products, view product details, view product configurations, copy products, and define product configurations.

Transactions

Here you can search for transactions and examine their details.

Systems

Here you can view and maintain systems.

2.3 Finding a Product with Quick Find

The Quick Find function appears in every page within Oracle Install Base. You use it when you have a specific identifier for a tracked instance that you want to investigate. Use this procedure to locate an instance with Quick Find.

Prerequisites

None

Steps

1. Click the Products tab.

   The Search Products page appears.

2. From the Quick Find list of values, select the type of unique identifier that you want to use to locate a tracked instance.

   For example, although an instance may not have a unique serial number, Install Base establishes its own instance number for anything that it tracks. Thus, if you know that number, you can select Instance Number as the type.

3. In the field immediately to the right, enter a value for the type of identifier that you selected.

4. Click Go.

   The Search Results page appears with the results of the search in the form of a list.

5. Click a link for an entry in the list to get additional details about the instance in the Product Details page.

2.4 Using the Go Button to Display a List of Values

Many pages within this application have a special use for the Go button in which it retrieves a list of values. In this use you enter a generic search value using `%` in the preceding field and then click Go to display a list of values that satisfy the generic criteria. When you select one of these results, it populates the associated field. For example, to display a list of values of all item numbers that begin with CM, you can enter the generic search value `CM%` in the Item Number field.

3

Using the Products Tabbed Page

Products are item instances that are being tracked. Oracle Install Base provides life-cycle tracking of such item instances. If an item is set up as trackable, then an instance is created when it is first received into inventory. Its ownership, status, and location are tracked for inventory movements, project issues, WIP issues, sales transaction, and return RMA. In addition, in Install Base many properties can be tied to the instance to facilitate its usability in other applications. An example is tracking the party relationships for a product. A product can be owned by one party but serviced by another. For each party, many accounts and contacts can be defined and stored. In addition, multiple configurations can he set up for an instance to track the relationships that are possible. This is especially useful in the telecommunication environment where, for example, a port can be a component of a switch but is connected to a circuit at the same time.

Item instances can be used to track non-tangible products such as telephone service. For example, a telephone number can have different services such as call waiting and conference call. These can all be defined as components of the telephone service. As such, contracts and warranty terms can be applied using CRM contracts, just as they can be applied to tangible products.

Counters can be tied to products so that usage can be captured. For example, if a product is an electrical meter, then counters can be used to store the meter reading, thus recording the usage that in turn generates revenue.

Service requests and repair orders can be viewed for products recorded in Install Base, which provides a repository of information of their location, bill-to address, ship-to address, service contacts, and relationship to other products.

For each product in Install Base, a history of transactions is being tracked and stored. Given a particular time frame, all history can be traced.

3.1 The Search Products Page

The Search Products page has the following regions:

Quick Find

Use this when you already know a unique identifier for a product, such as a serial number or a sales order number.

Search Products

Within this region you can define and display searches according to saved criteria.

Saved Searches

Use this to create, save, and use personalized, named search criteria.

Search Results (untitled)

The untitled region below Saved Searches displays the results of your most recent search. From here you can view details of listed items and perform other operations on them.

After you have performed a search, the result list appears in the Search Products page. The functions available to perform on entries on this list are as follows:

Remove button

Marks the entry as a candidate for changing the status of the product to Expired when you click Update.

Description link

Displays the General Attributes region of a Product Details page.

View Configuration icon

Displays the Product Configuration page. There you can view product configurations by relationship type and version, expire relationships, and add and create subproducts.

Copy button

Displays the Copy Product page. There you can use the copy of the product definition to define another product. The Copy Product page is very similar to the Create Product page reached with the Create button. The main difference is that the Copy Product page already has supplied some values.

Update button

Changes the status of entries with the Remove box selected to `Expired` and puts the current date and time as the end date and end time. Changing a product status to `Expired` does not remove the product from Install Base.

Create button

Displays the Create Product page. There you can define a new product.

3.2 The Product Details Pages

From the side navigation menu on the left of a Product Details page, you can access the following features and functions:

General

View and define general information about the product such as system name, serial number, owner, and location.

Additional Attributes

View and update values for additional attributes defined for an item or instance.

Assets

View and define associated asset information such as asset number, date placed in service, and employee.

Party Relationships

View and define names, types, and effective dates for additional parties that can be associated with an instance. You can use these features to transfer ownership.

Pricing

View extended pricing attributes that come from Order Management sales order lines at the sale of a product.

Counters

Review and update counter readings.

Contracts

View information such as the name, effective dates, coverage description, and warranty for associated contracts.

Notes

Create and view notes associated with a product.

Transactions

View the most recent transactions for this product.

Service Requests

View and create service requests associated with the product.

Repair Orders

View open, closed, and hold repair orders for a product.

History

Retrieve and view the history of a product.

Operating Units

Work with operating units associated with a product.

Configuration

Displays the Product Configuration page. There you can view the various configurations and define children for an instance.

3.3 Using Saved Searches

With saved searches you can easily reuse a set of possibly complicated search criteria by assigning a name to a saved set of criteria. Use this procedure to display the results of a previously named set of search criteria.

Prerequisites

None.

Steps

1. Click the Products tab. The Search Products page appears.

2. In the Saved Searches list of values, select the name of the predefined search that you want to use.
3. Click Go. The search results appear in the lower part of the page.
4. As desired, click the link for an item description to display details about it.

3.4 Defining Saved Search Criteria

With saved searches you can easily reuse a set of possibly complicated search criteria by assigning a name to the saved set of criteria. Most of this defining process occurs on the Advanced Product Search page. This page is organized by regions of basic categories under which you can define and test various specific search criteria. After you are satisfied with intermediate or final results of your tests, you can save the set of criteria with a name of your choice. The basic category regions are:

- General Attributes
- Current Location
- Party
- Party Accounts
- Assets
- Table Personalization (defines the position of displayed columns)

Most fields within the regions are followed by a Go button. The button indicates that you can enter a generic search value using `%` in the associated fields and then click Go to display a list of values that satisfy the generic criteria. When you select one of these results, it populates the associated field.

Use this procedure to define a named set of search criteria.

Prerequisites

None

Steps

1. Click the Products tab.

   The Search Products page appears.

2. Click Personalize.

   The Advanced Product Search page appears.

3. In each basic category region, enter data in the fields.

   As necessary, use generic entries and the associated Go button to populate fields with specific values.

   Click the calendar icon to help you enter dates.

   As necessary, click Clear to clear out your test entries, and re-enter values.

4. In the Table Personalization region, use the Move and Remove commands and arrows to move selected columns between the list of available columns and columns that you select for display.

5. Use the arrows in the right-hand column of the personalization table to arrange the display sequence of your selected columns. The column titles as arranged from top to bottom are displayed from left to right on the Search Products page.

6. As appropriate, click one of the following:

   - Search: Finds values that satisfy the current search criteria
   - Save As: Saves the current search criteria with a name that you enter
   - Save: Saves the search criteria under the most recently used name for search criteria
   - Save and Search: Saves the search criteria under the most recently used name for search criteria and then performs a search that uses those criteria

References

The Search Products Page

3.5 Creating Products

In the Create Product page you can create a product, or item instance. You can also edit a partial product definition that you began earlier but want to complete. The page has regions for general item information, owner information, current location, item flags, and item views. If you are aware of another product in Install Base that has many of the same values for this information, then use the copy product procedure instead.

Selecting the Sellable checkbox means that the product is orderable and reflects that the corresponding item has been set to orderable in the setup of the Item Master. The Merchant checkbox is selected automatically if an agent creates or changes the instance. Similarly, the Customer checkbox is selected automatically if a customer creates or changes the instance.

Use the following procedure to create a product.

Prerequisites

The item and item number for an item instance (product) must already be defined in the Inventory Item Master as IB trackable.

Steps

1. Navigate (T) Products > (T) Products > (B) Create.

   The Create Product page appears.

2. In each region, enter data in the fields.

   As necessary, use generic entries and the associated Go button to populate fields with specific values.

   Click the calendar icon to help you enter dates.

   Sellable means orderable and reflects selecting the Orderable flag in the item master setup. The Merchant flag is automatically selected if an agent creates or changes the instance. The Customer flag is automatically selected if a customer creates or changes the instance.

   As necessary, click Clear to clear out your test entries, and re-enter your values.

3. If your definition is complete, then optionally select Creation Completed.

   Doing so means that it can be used for configuration and other applications.

4. Click Submit.

   A Product Details page appears for your product with its new product (instance) number. If you provided values for all the required fields (with asterisks) but did not select Creation Completed, then the application selects it for you. If an instance is created without the mandatory fields, then Creation Completed is not selected. This means that the instance cannot be used in applications such as Service Request.

Guidelines

Typically this is an appropriate time to associate additional attributes, contacts, parties, and accounts with the product.

3.6 Copying Products

In the Copy Product page you can create a product, or item instance, by copying another. It is essentially a create product window without specific details such as serial number. Changes can be made to the copied template, and options are available to specify what can be copied such as party and account information. The page has regions for general item information, owner information, current location, item flags, item views, and other characteristics.

Selecting the Sellable checkbox means that the product is orderable and reflects that the corresponding item has been set to orderable in the setup of the Item Master. The Merchant checkbox is selected automatically if an agent creates or changes the instance. Similarly, the Customer checkbox is selected automatically if a customer creates or changes the instance.

Use the following procedure to copy a product.

Prerequisites

None

Steps

1. Navigate (T) Products > (T) Products.

   The Search Products page appears.

2. If an appropriate product list for copying a product is not already displayed, then generate such a list by performing a search as described in The Search Products Page.

3. Click Copy for the product whose description you want to use to define a new product.

   The Copy Product page appears.

4. In each region, enter data in the fields.

   As necessary, use generic entries and the associated Go button to populate fields with specific values.

   Click the calendar icon to help you enter dates.

   As necessary, click Restore to return the settings to those of the copied product, and re-enter values.

5. If your definition is complete, then optionally select Creation Completed.

6. Click Save.

If you provided values for all the required fields (with asterisks) but did not select Creation Completed, then the application selects it for you.

3.7 Working with General Attributes

In this page you can view, define, and modify general information about a product, such as system name, serial number, owner, and location. This page is organized by regions of basic categories under which you can define and test various specific search criteria.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select General.
2. In each region, enter data in the fields.

   As necessary, use generic entries and the associated Go button to populate fields with specific values.

   Click the calendar icon to help you enter dates.

   With the Split item flag, you can indicate that you want to divide a quantity greater than 1.

   As necessary, click Restore to return the settings to those of the most recently saved state of the product, and re-enter your values.
3. If your definition is complete, then optionally select Creation Completed.
4. Click Save.
5. If you selected the Split item flag, then a page appears in which you can define how you want to split the quantity for your product. T

3.8 Working with Additional Attributes

In the Additional Attributes page you can supply a value for a list of additional attributes, which were defined at setup time.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Additional Attributes.
2. Enter values for the displayed attributes.
3. As necessary, click Restore to set values to the state of the last update, and re-enter values.
4. Click Update to save your set of values.

3.9 Working with Assets

In the Assets page you can view and define associated asset information such as asset number, date placed in service, and employee. Use this procedure to add an asset to the Assets list.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Assets.
2. Click Add Asset. The Search Assets page appears.
3. In each region, enter data in the fields.

   As necessary, use generic entries and the associated Go button to populate fields with specific values.

   Click the calendar icon to help you enter dates.

   As necessary, click Clear to clear out your test entries, and re-enter values.
4. Click Search. The Asset Search Results page appears.
5. If necessary to refine your search, select an item and click Refine Search Criteria. You are returned to the Search Assets page. Go to step 3.
6. Fill blank fields of candidate assets, and use Go buttons as necessary.
7. Select an asset that you want to add.
8. Click Add to Product.

   The asset is added to your product.

3.10 Working with Parties

In the Parties pages you can view and define parties and their associated accounts and contacts. Use this procedure to work with parties.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Parties.

   The Parties page appears. Here you can view and define parties.

2. To mark a party for removal, select Remove for the party name.
3. Use the lists of values and the Go buttons as necessary to define party type, party name, and relationship type.
4. Enter start and end dates.

   If no start date is entered, then it defaults to the current date. If you want this party relationship to end on a particular date, then enter it as the end date. It can be the current date or a future date.

5. Click Restore to return values to those saved last, and re-enter values or click Update to save changed values.
6. Optionally, you can click Account Details or Contact Details to take you to their respective pages.
7. In the side navigation menu, select Accounts.

   The Party Accounts page appears. Here you can view and define accounts.

8. Select a party from the list of values and click Go so that the accounts for that party can be defined or viewed. You can define multiple accounts for a single party.
9. To mark an account for removal, select Remove for the account name.
10. Use the lists of values, Go buttons, and calendar icons as necessary to define account numbers, relationship types, and start and end dates.
11. Click Restore to return values to those saved last, and re-enter values or click Update to save changed values.
12. In the side navigation menu, select Contacts.

The Party Contacts page appears. Source Type provides the source of information about the contact.

13. Select a party from the list of values and click Go so that the contacts for that party can be defined or viewed. You can define multiple contacts for a single party.
14. To mark a party contact for removal, select Remove for the contact name.
15. Use the lists of values and the Go button as necessary to define party contacts.
16. Optionally, click Details for an entry for a summary of information about a particular party contact.
17. Click Restore to return values to those saved last and re-enter values or click Update to save changed values.
18. In the side navigation menu, select Summary.

    The Parties Summary page appears. Here you can view a summary of associated parties and the accounts and contacts for each.

3.11 Viewing Pricing Attributes

With the Pricing Attributes page, you can view and set the values for pricing attributes.

Use this procedure to view and define values for pricing attributes.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Pricing.

   The Pricing page appears. Here you can view and set value for pricing attributes.
2. Use the context filter to select a particular set of pricing attributes.

   The contexts are part of the setup for extended pricing attributes in Order Management.
3. Click Go. A list of pricing attributes and associated values appears.
4. Edit the values as necessary.

5. Click Restore to return values to those saved last, and re-enter values or click Update to save changed values.

3.12 Working with Counters

With the Counters application, you can define counters for a product to monitor the usage of customer products and services and execute business processes based upon the usage information. Common everyday objects that have counters are an automobile (the odometer), a gas meter, and a photocopy machine. Counters provide a mechanism for tracking new product warranties, service contracts, support agreements, and similar business needs.

As a piece of equipment recorded in Install Base is put into service, its usage can be tracked by incrementing the counters associated with the unit. These counters may be updated manually or automatically on regular intervals. The Counters application determines the counter names, counter types, and adjustment types that appear in this page. In Install Base you cannot define counters, but you can view, adjust, enter, and reset their readings.

Use this procedure to view, adjust, and reset counter readings.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Counters.

   The Counters page appears. Here you can view, adjust, and reset counters.

2. In the Reading region, enter any necessary new readings for specific counters.
3. As necessary, in the Adjustment region, select an adjustment type, and enter an adjustment amount.
4. As necessary, in the Reset region, select the counter that you want to reset, enter the readings before and after reset, and enter a comment for the reset.
5. Click Restore to return values to those saved last, and re-enter values or click Update to save changed values.

3.13 Working with Contracts

In the Contracts page, you can view information about contracts related to an item instance.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Contracts.

   The Contracts page appears and displays the current contract information.

2. To view details of a displayed contract, click the link in the Number field.

3.14 Working with Notes

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Notes.

3.15 Viewing Transactions

In the View Latest Transactions page, you can see recent transactions for the current item instance. Use this procedure to view the latest transactions.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select View Latest.

The View Latest Transactions page appears. Definitions of selected columns on this page are as follows:

Application	The source application of the transaction.
Source Group Ref	A grouping of source headers such as a purchase order group.
Source Header Ref	The document number of the source such as a sales order number or purchase order number.
Source Line Ref	The line number of the source document such as a sales order line number for a sales order.
Source Distribution Ref	A free-form source reference for the source application.

2. For details of a particular transaction, click the transaction ID. The Transaction Details page appears, which provides information about the associated product, pricing, parties, party contacts, and party accounts.

3.16 Splitting Quantities

In the Split Quantity page you can subdivide a product with quantity greater than one into parts whose total quantities equal the original quantity. You can split the original quantity into two or n parts. Install Base automatically creates serviceable products under serial control with a quantity of one. Only nonserialized products are created with a quantity greater than one.

Some reasons for splitting quantities are as follows:

- Isolate a quantity for transfer to an end customer
- Set apart a quantity to be terminated
- Set aside a quantity for installation elsewhere
- Set apart a quantity to apply or order a new service program
- Set apart a quantity for upgrade or repair

Use this procedure to split quantities.

Prerequisites

You must have selected a product with quantity greater than 1 and navigated to a Product Details page.

Steps

1. In the General Attributes region, click Split.

   The Split Quantity page appears.

2. To split the original quantity into two parts, in the Split into Two Products region, enter the first and second quantities.
3. Click Restore to return values to those saved last, or click Update to save changed values.
4. To split the original quantity equally among n products, in the Split into n Products region, click Update.
5. Click Restore to return values to those saved last, and re-enter values or click Update to save changed values.

   The application displays information for the newly created instances.

3.17 Transferring Ownership

In the Transfer Ownership page, you can transfer ownership of a product from one active party to another. Use this procedure to transfer ownership.

Prerequisites

- You must have selected a product and navigated to a Product Details page.
- A transfer must have two valid parties to occur.
- The two valid parties must have been set up in the Contact Center as related customers.

Steps

1. In the side navigation menu, select Owner.

The Transfer Ownership page appears.

2. In the Transfer Ownership region, enter the new party type, account type, and party name. Use the Go buttons as necessary to help you to select entries.
3. Click Restore to return values to those saved last and re-enter values or click Update to save changed values.
4. In the associated address regions, enter the new shipped-to address and billed-to address. Use the Go buttons as necessary to help you to select entries.
5. Click Restore to return values to those saved last or click Update to save changed values.

3.18 Working with Service Requests

In the Service Requests page, you can view the service request that caused some service to occur that was recorded in Install Base. Earlier, when the service request was made, a check probably was made to Install Base to get current information about the account. From this page you can also create new service requests.

Use this procedure to view and create service requests.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Service Requests.

   The Service Requests page appears.

2. Use the View Service Requests list of values and Go button to select a category of service request to display.
3. For displayed records click the entry under Details for further information.
4. If you want to create a new service request, then click Create New Service Requests.

3.19 Viewing Repair Orders

In the Repair Orders page you can view open, closed, and hold repair orders associated with an item instance. Use this procedure to view repair orders.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Service Requests.

   The Service Requests page appears.

2. In the View Repair Orders list of values, select the category of repair order.
3. Click Go.

   Any related repair orders appear.

3.20 Viewing History

In the Product History page you can view the whole history of an item instance. Use this procedure to view product history.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select History.

   The Product History page appears.

2. Enter selection criteria:

   - Enter a value in the Version Label field. Use the % placeholder and the Go button as necessary to help you to enter an appropriate version label.

     Selection of an entry from the Go version label list also provides the entry's associated date and time.

   - Alternatively, you can leave the Version label field blank and enter a date and time.

   Date and Time refer to the time that a transaction occurs in Install Base. A given value of version can have multiple time stamps associated with it.

3. Click Retrieve History.
4. The available history appears and shows the times of changes as separate entries.
5. Click a link for an entry to display the details of the changes made at that time.

3.21 Working with Operating Units

In the Operating Units page, you can view, add, and remove the association of operating units with a particular item instance. An operating unit is an organization with which the instance can be associated. When it is sold from one organization, a unit is assigned to the sold-from relationship for the instance. Service can be provided by yet another organization unit such as one in Field Service. The service billed-from unit is an organization that collects the receivable and can be used by Service Request. Use this procedure to work with operating units.

Prerequisites

You must have selected a product and navigated to a Product Details page.

Steps

1. In the side navigation menu, select Operating Units.

   The Operating Units page appears and displays any operating units now associated with the selected instance.

2. If you want to delete a displayed association with an operating unit, click the Remove icon for that unit. The removal will take effect permanently on clicking Update.

3. To modify or add a new association as necessary, enter values for the operating unit, type, start date, and end date. Use the % placeholder and the Go button as necessary to help you to enter an appropriate operating unit.

4. Click Restore to return values to those removed last, and re-enter values or click Update to save changed values.

3.22 The Product Configurations Page

In the Product Configuration page you can view product configurations by relationship type and version, expire relationships, and add and create subproducts.

The ability to track products down to the component level is especially important in field service environments, where components are often exchanged or repaired as part of maintenance agreements. As-built and as-shipped product configurations can also be tracked.

Selective Page Description

View Relationship Type Field

Defines the type of relationship that you seek. For explanation of relationship types, refer to Understanding Relationship Types.

Select Column

Selections here mark entries as candidates for removal from a relationship when you click Expire.

Description Column

Displays the items with the selected relationship type. Click the + (plus sign) to expose immediate children in a relationship.

Expire Button

Removes relationships selected for expiration in the Select column. Do not click this button when the topmost product in a structure is selected.

Add Button

Use this to add an item instance to the instance displayed in a row.

Create Button

Use this to create an item instance to add to the instance displayed in a row.

Show Parent Button

Use this to view the parent of a configuration.

3.23 Understanding Relationship Types

With Install Base you have a flexible way of maintaining six different types of instance-to-instance relationships. These relationship types are seeded in the relationship type table, which you cannot extend.

Install Base supports the following relationship types:

- Component-Of
- Connected-To
- Upgraded-From
- Member-Of
- Installed-On
- Provided-By

Component-Of

This relationship type is used to maintain the configuration or structure of an item instance. You will use this for most of your needs in the management of item configuration. This is the only configuration type that can be created from ERP integration from the bill-of-materials (BOM), assemble-to-order (ATO), or pick-to-order (PTO) model.

An example:

- The following items are parts of a personal computer:
  - Motherboard
  - CPU
  - I-O boards
  - RAM
  - Monitor
  - Keyboard
  - Mouse

Connected-To

This relationship type can be used to maintain the connection scheme of a group of item instances. In other words, it can be used to represent a network of connected items.

An example of this type of relationship is the representation of a computer network in which different computers and network equipment are connected to each other through connected-to relationships:

```
john-pc-01
|___vivek-sun
|___jenny-pc
          |___print-server-05.2
          |___ST-Tool-Server-1
```

Upgraded-From

This relationship type is used to store the relationship between item instances when some of the item instances are upgraded from others. This type of relationship is especially useful in tracking software instances and their relationships with each other.

For example, consider a set of software components stored as item instances in Install Base. Some software instances are upgraded from their old versions. The original and upgraded versions of the software are stored as item instances and are connected to each other by an upgraded-from relationship:

```
Win 3.1.1
    |_______Win95
    |              |_____Win95-patch 1.1.2
    |              |_____Win95-patch 1.2.0
    |
    |_______Win98
```

Member-Of

This relationship type is typically used to maintain the configuration of a group or system of item instances and provides the flexibility to maintain multi-level grouping of item instances.

For example, consider a car on which a fuel injection system and a cooling subsystem are installed. Each subsystem can have a number of components that are members of it:

```
Nissan 240 SX (serial # NS-23405679-278)
|____Fuel Injection system
|          |___Fuel injection valve-1 (serial # E-34897)
|          |___Fuel injection valve-2 (serial # E-22787)
|          |___Fuel Filters
|
|____Cooling System
         |____Radiator (serial # X-44545)
```

Installed-On

This relationship type is typically used for software item instances to capture their installation information.

For example, a number of software instances can be installed on a physical item instance. These software components are not actually components of or connected to the parent hardware system and hence do not qualify for the business rules applicable to those relationship types. Hence, the installed-on relationship type provides a convenient way of tracking the software installed on a system:

ffaruqi-pc

```
|__Solaris 4.5
|       |___Oracle 8.0.5
|       |___Net Monitor 2.0
|
|__Windows NT 4.0
        |___Microsoft Office 2000
        |___Norton Anti Virus
```

Provided-By

This relationship type is typically used to maintain relationships between systems and the services provided by them.

For example, consider a PCS service license purchased by a user for his cellular phone. As part of the PCS service plan, the messaging service is provided, for which the user pays an additional fee to the PCS service provider. The messaging service in turn provides the voice mail and paging services. This service provision information can be tracked in Installed Base using the provided-by relationship:

Sprint PCS Service ((408-255-6787)

```
|___Messaging Service
|           |____Voice Mail Service
|           |____Paging Service
|
|___Internet Access
|            |____Oracle Mobile Services
|
|___Sprint Emergency Roadside Assistance Service
```

3.24 Adding a Subproduct

Use this procedure to add a subproduct.

Steps

1. In the Product Configuration page, click Add for the item instance to which you want to add a subproduct.

   The Search Subproducts page appears.

2. Use the Quick Find or Saved Searches as necessary to display the appropriate subproduct.

3. From the Select column, select the item that you want to add.

4. Click Add as Child.

   The subproduct is added to the structure.

3.25 Creating a Subproduct

Creating a subproduct involves both creating an item instance and defining it as a child in a relationship. In the Create Sub-Product page, you can create a product, or item instance. You can also edit a partial product definition that you began earlier but want to complete. The page has regions for general item information, owner information, current location, item flags, and item views. Use the following procedure to create a subproduct.

Prerequisites

The item and item number for an item instance (product) must already be defined in the Inventory Item Master with the IB Trackable flag selected.

Steps

1. In the Product Configuration page, click Create for the item instance to which you want to create a subproduct.

   The Create Sub-Product page appears.

2. In each region, enter data in the fields.

   As necessary, use generic entries and the associated Go button to populate fields with specific values.

   Click the calendar icon to help you enter dates.

   As necessary, click Clear to clear out your test entries, and re-enter them.

3. If your definition is complete, select Creation Completed.

Doing so means that Install Base will begin to track your product after you submit your completed definition.

4. Click Create Child.

   The subproduct is added to the structure.

4

Using the Transactions Tabbed Page

You can use the Transactions tabbed page to define transaction search criteria and view the results. Available search criteria include transaction type, sub-transaction type, specific value in a transaction, date of transaction, and transaction status.

Transaction types are specified for any transaction source that has formal interfaces with Install Base. For example, transaction types from Oracle Applications include Order Management - Fulfillment, Order Management - Shipment, and RMA Receipt. Oracle Enterprise Install Base contributes types such as PO Receipt into Project, and Asset Retirement. Many more types are available.

For each transaction type, subtypes can be defined to further specify the actions on one or more Install Base records if this combination of transaction types and subtypes is selected for the interface transaction. These subtypes can be selected from a list of values in the transaction detail window from the ERP calling application, such as Order Management sales order line. If the update comes from applications such as Enterprise Install Base or Oracle Field Service that directly interact with Install Base, then the update transaction record includes fields with the types and subtypes. Such transaction types, subtypes, and actions can be defined in the Source Transaction Sub Type Setup window.

When an Order Management - Shipment transaction updates Install Base, a transaction bearing the transaction type, subtype (Ship), order number (Source Header Reference), order line number (Source Line Reference), and transaction date update Install Base, and a history transaction record is created. Each of these transactions bears a status such as Complete or Pending.

Based on the properties of the transaction, a search can be specified, for example, for display of the activities for Order Management - Shipment, with a transaction date of 07-Aug-2001.

The result of the selection criteria search is displayed with each transaction bearing a transaction ID, which is used as a link to a detail display page of the transaction.

4.1 Searching Transactions

In the Search Transactions page, you can define search criteria for transactions and then view the transactions that meet these criteria. Use this procedure to search transactions.

Prerequisites

None

Steps

1. In the Products tabbed page, click the Transactions tab.

   The Search Transactions page appears.

2. Enter a transaction type.

   As an aid, enter a generic value or %, and click the Go button to display a list from which you can select the desired transaction type.

3. Enter values in other fields to further qualify your search criteria as needed.

   As an aid, use the calendar icon to specify desired dates.

4. If necessary, click Clear to blank out your entries, and re-enter them.
5. Click Submit to display the transactions that meet your search criteria.
6. To see the a list of the instances under a transaction, click the link for its transaction ID.

   The Instances for a Transaction page appears with a list of the associated instances.

7. To see the transaction details for a particular instance, click the link for its description.

5

Using the Systems Tabbed Page

In the Systems tabbed page, you can define and view systems for a customer, which is an owner party with an account. A system is a construct that products owners can define to group their products. For example, a headquarters can have many buildings, and each building can have many floors. Headquarters can be a system, each building can be a system, and each floor can be a system. There can be a hierarchy in system structure. For example, headquarters can be parent of all the buildings, and each building can be a parent of all the floors in the building. Products can be grouped under each system. Thus the headquarters can own a number of networks, each building can own many servers, and each floor can own many PCs and printers.

5.1 The Systems Page

In the Systems page you can view and define systems, which are hierarchical groupings of products. The initial display of the Systems page lists all available systems ordered by systems ID and includes information such as name, description, and type. Selected entries on the page are:

Remove

Marks a system for removal when you click Update.

System ID

Is a unique identifier whose link takes you to a page where you can view and edit system details.

View Configuration (Icon)

Displays a graphical representation of the system configuration.

Products (Button)

Displays the products that are tied to the system.

Products are tied to system in the Product Details page. Only products of the same customer and account as the system can be tied to the system.

Create (Button)

Displays a page where you can define a new system.

Update

Removes those systems marked for removal.

Refine Search

Enables you to display a subset of all systems on this page.

5.2 Refining a Systems Search

The initial display of the Systems page lists all available systems ordered by systems ID. Use this procedure to filter this display.

Prerequisites

None

Steps

1. In the Products tabbed page, click the Systems tab.

   The Systems page appears with all systems listed.

2. Click Refine Search. The Search Systems page appears.
3. To refine your search, enter values as necessary for general information, installation details, billing details, shipping details, and contact details. As an aid, use available lists of value and calendar icons.
4. If you need to erase your entries, click Clear, and re-enter values.
5. Click Search.

   The Systems page reappears showing only the systems that meet your search criteria.

5.3 Working with System Details

In the Systems Details page you can view and edit system details such as installation location, shipping and billing information, and contacts.

Steps

1. Navigate to the System Details page by selecting a System ID link from the Systems page.
2. As necessary, edit the values in information fields. As aids, you can use calendar icons, generic entries, and Go buttons to help you to select values.
3. If you need to correct many entries, Click Restore to return values to their last saved state, and re-enter values.
4. Click Update to save your edits.

5.4 Working with System Configurations

In the Systems Configurations page you can see a graphical representation of a system. From this perspective you can also launch into pages to display and edit system components. You can only group systems with the same owner and account. Use this procedure to work with system configurations.

Steps

1. Navigate to the System Configurations page by selecting the View Configuration icon for a system on the Systems page.

   The selected system becomes the top of the displayed configuration hierarchy.
2. To expose any configuration components below one with a right-pointing arrowhead, click the arrowhead.

   The arrowhead points downward, and defined subcomponents appear. Clicking a downward-pointing arrowhead conversely removes display of subcomponents.

   Clicking Show Parent shows the parent of the configuration
3. To access the details of an exposed system, click its name.

   The System Details page for that system appears.

4. View and edit the system details as necessary as described in Working with System Details. When you have finished, return to the Systems Configurations page.
5. To expose the parent of the system originally selected on the Systems page, click Show Parent.

   If a parent exists, it appears in the graphical display.

5.5 Creating a System

In the Create System page you can define a system. One way do this is to cycle through this page, first by creating the top of the system hierarchy and later by assigning it as the parent of subcomponents that you define.

Steps

1. Navigate to the Create System page by clicking the Create button on the Systems page.

   The Create System page is like the Systems Details page but has no values supplied.
2. As necessary, enter appropriate values in information fields. As aids, you can use calendar icons, generic entries, and Go buttons to help you to select values.
3. If you need to correct many entries, click Clear to blank out values, and enter new ones.
4. Click Create to save your work.
5. To create other components of the system, repeat the previous steps in this procedure.

   Use the Parent Name field to link what you define to a previously defined component.

6 Using the Transaction Details Window

This topic group covers the following topics:

- Accessing the Transaction Details Window
- The Transactions Details Window

6.1 Accessing the Transaction Details Window

Unlike the main interfaces for end users in Oracle Install Base, the Transaction Details window is based on forms, not HTML. Therefore the window requires a different access procedure than does the main part of the application.

You access the Transaction Details window through the Sales Orders window as follows:

1. Using the URL, user name, and password provided by your local system administrator, log in to the forms mode of Oracle Applications.
2. From the Responsibilities menu, select the Order Management Super User responsibility, and click OK.
3. From the Navigator, choose Orders, Returns > Sales Orders.

   The Sales Orders window appears.
4. Enter an appropriate sales order number in the Order Number field to populate the window.
5. In the Line Items tabbed page, select a line.
6. Click Actions.

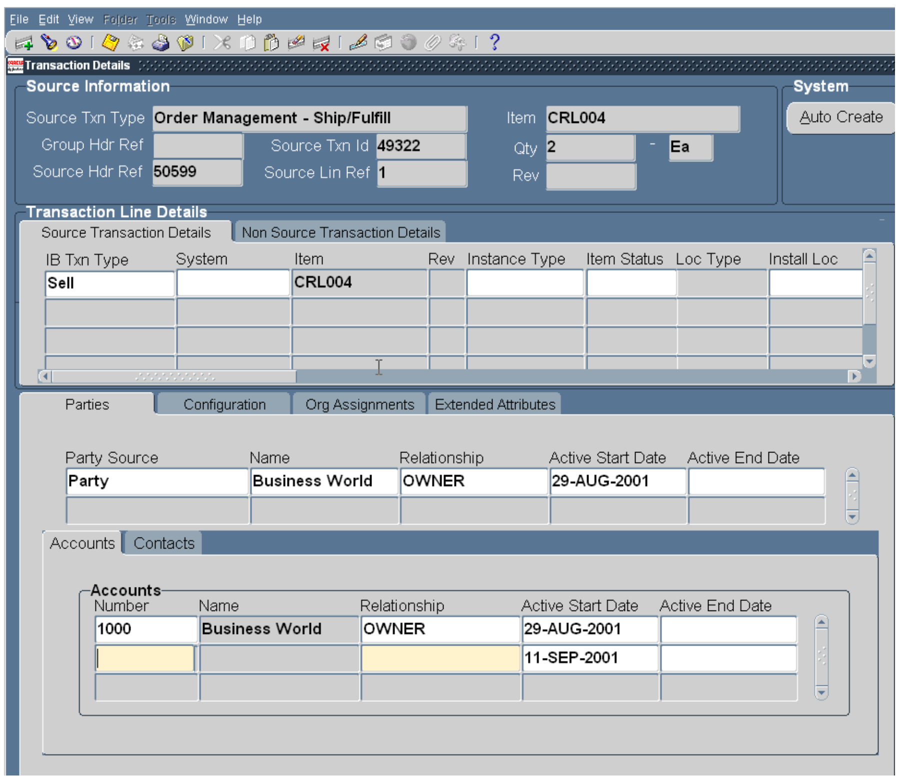
   The Actions window appears.
7. Select Installation Details and click OK.

The Transactions Details window appears.

6.2 The Transaction Details Window

The Transaction Details Window is used to specify the transaction type used to update a source instance and non-source instance and to define multiple parties, contacts, accounts, organization assignments, configuration, and extended attributes for the source instance. In addition, a new system can be created for the instance from this window.

Figure 6–1 Transaction Details Window



Source Information Region

This region shows the source transaction type, table, and ID being deployed here. These are implemented in the Install Base Transaction Type and Sub Type setup. In this case it identifies the application for this transaction detail to be Order Management Ship-Fulfill. It also displays the source transaction item number, quantity, and unit of measure.

System Region

Auto Create Button

Use the Auto Create button to define a new system for the source instance. This process is similar to setting up a system and related information in the system setup in the HTML page. After setup here, the system name can be used to associate it with the source instance.

Transaction Line Details Region

Source Transaction Detail Tab

Use this tab to specify the attributes and transaction type for the item displayed in the Source Information region. This tab provides for specifying the Install Base transaction type, which is defined in the subtype name of the transaction type and subtype setup window. In that setup, the kind of actions that can happen to a source instance, its related non-source instance, and parent instance have already defined. An LOV displays only the types defined for this source application.

This window can also be used to specify system, instance type, status, installation location, installation date, serial/lot number being processed, instance number being referenced, in service date, external reference, version label, start date, and end date. For the instance, the following can be defined: party, configuration, organization assignment, extended attributes, accounts, and contacts.

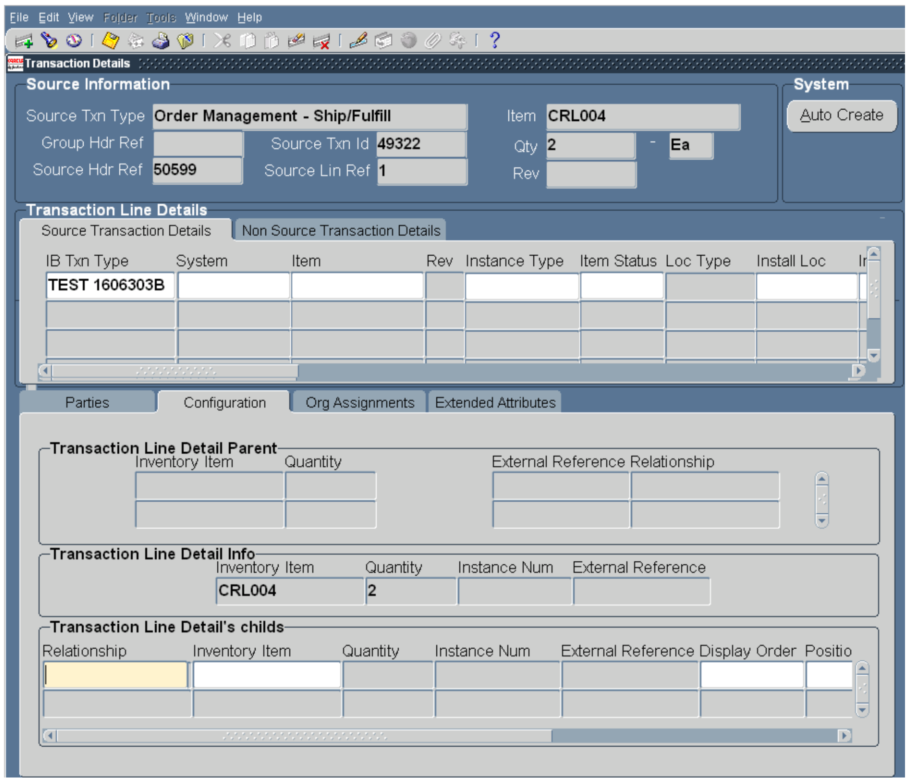
Parties Tab

For a sales shipment line, the owner party is displayed and cannot be changed. In addition, other parties with different relationship types can be specified here for the source instance. For each of these parties, the Accounts tab and the Contacts tab can be used to define multiple accounts and contacts for the source item.

Configuration Tab

If the source item is a BOM-enabled item, or if it is an existing instance with a configuration, then the parent-child relationships of all its relationships are displayed. Here children of various relationship types can be added and updated.

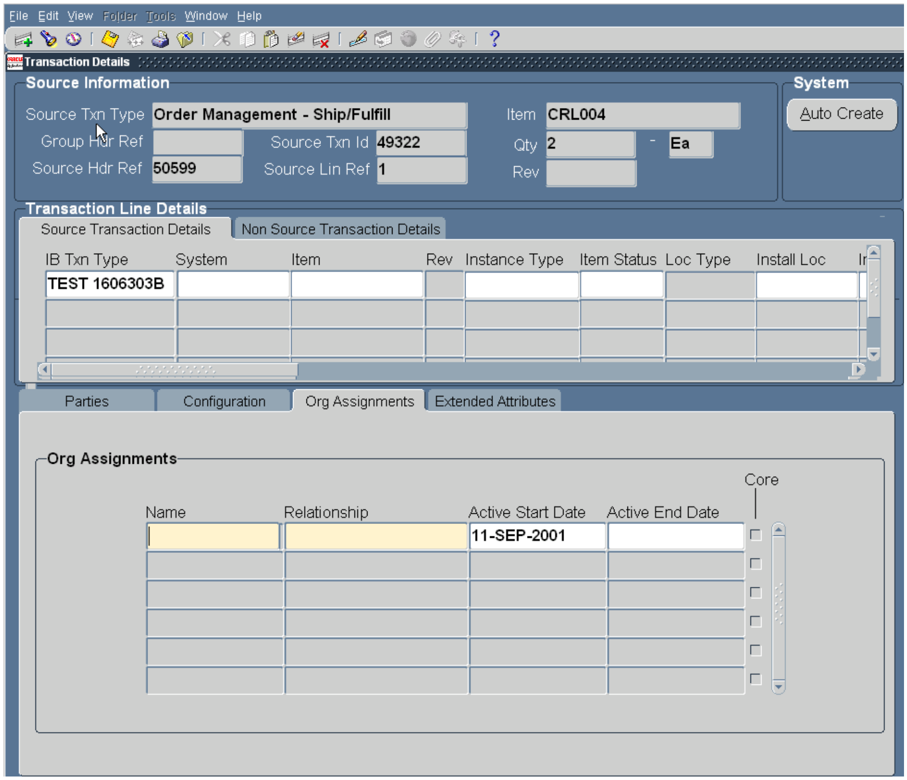
Figure 6–2 The Configuration Tab of the Transaction Details Window



Org Assignments

Here the various organization assignment such as Service Billed From can be specified for the source instance.

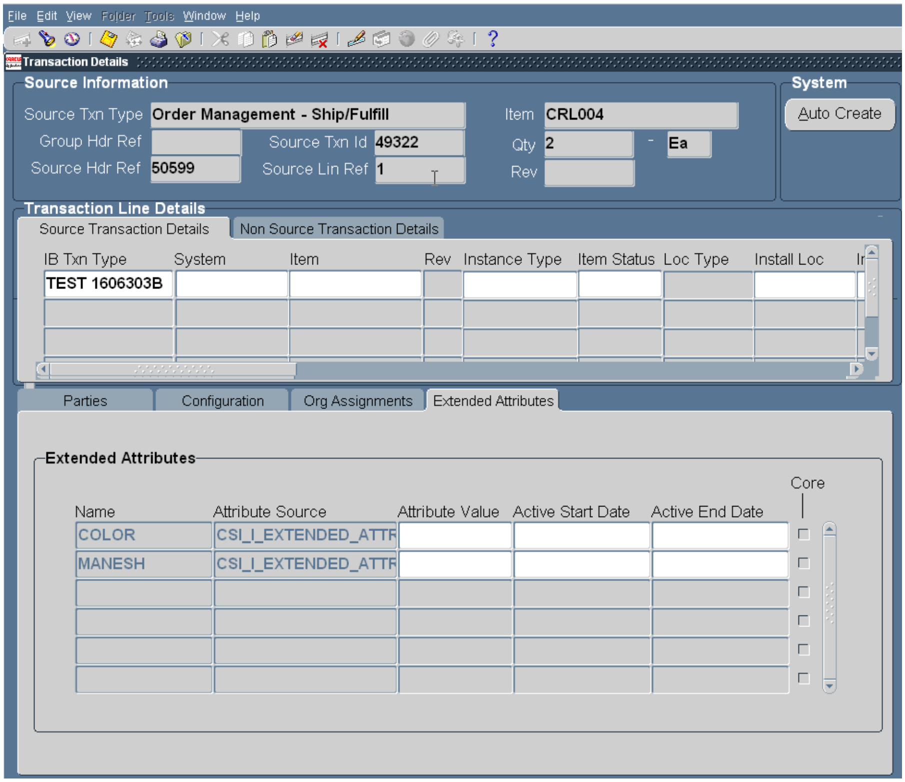
Figure 6–3 Org Assignments Tab



Extended Attributes

If any extended attribute has been defined for this item, instance, or category, then the values for these attributes can be entered here.

Figure 6–4 Extended Attributes Tab



Accounts

This tab is used to define accounts for a party. For a shipped item on a sales order line, the owner account default is displayed. In addition, more accounts can be specified for the party of the source instance.

Contacts

This tab is used to define contact for a party. Multiple contacts can be specified for the same party of the source instance.

Non Source Transaction Detail Tab

This tab is to specify the attributes for the instance that is related to the one displayed in the Source Information region. An example of a non-source instance is an instance being replaced by the one being shipped in the source transaction. You can specify system, instance type, status, installation location, installation date, serial/lot number being processed, instance number being referenced, in service date, external reference, version label, start date, and end date. For the non-source instance, the following can also be defined: party, configuration, organization assignment, extended attributes, accounts, and contacts.