# Oracle® Install Base

Implementation Guide

Release 11*i*

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Oracle Install Base Implementation Guide, Release 11*i*

Part No. B10167-02

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**Oracle Install Base Implementation Guide, Release 11*i***

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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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## 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 for new users to implement the product.
- Chapter 3 provides details of the setup steps for upgrade users to implement the product.
- Chapter 4 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 11*i* 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 11*i*.

### 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, Bills of Material, and WIP.

### Oracle Service Fulfillment Manager Implementation Guide

This document is required for the setup of the SFM (Service Fulfillment Manager) Event 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

This chapter covers the following topics:



## 1.1 Summary 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 Features of Oracle Install Base

## 1.2.1 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 date
- Definable extended attributes

## 1.2.2 Instance Maintenance

Oracle Install Base provides for creation, update, querying, and copying of instances through Install Base user interfaces or through integration from other modules, such as Field Service, Teleservice, Service Contracts, Depot Repair, Receipts, Work in Process (WIP) completion, Inventory transactions, Fixed Assets, Projects, 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.

## 1.2.3 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.

### 1.2.4 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.

### 1.2.5 Multiple Inter-Instance Relationships

Oracle Install Base provides for different kinds of relationships 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 Bills of Material (BOM) during integration with Order Management (OM).

### 1.2.6 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.

### 1.2.7 Mass-Edit 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.

### 1.2.8 Extended Attributes

Oracle Install Base supports user-definable extended attributes by item, item category, instance, and enterprise. These attributes are created at instance creation and can be updated.

## 1.3 Integration Points and Dependencies for Oracle Install Base

### 1.3.1 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
- Access for view and reference by applications such as Service Contracts, Teleservice, and Depot Repair.
- Trading Community Architecture (TCA) party for party and relationship

  When using the TCA merge routines with Install Base records, Oracle recommends that the party merge be done before the account merge. In addition, the internal party that is set up in the Install Base parameter cannot be used in the merge. For details, refer to Section 2.5.1 in this document.
- Integration with Oracle Quoting through transaction detail

  When entering a quote, you can invoke the transaction detail to enter additional information for Install Base. When the quote becomes an order, the transaction detail is copied against an Order Management order. This is processed when the order is shipped as described in the Order Management integration.

### 1.3.2 ERP-Install Base Integration

Oracle Install Base has the following integration points with Oracle ERP applications through the Oracle Service Fulfillment Manager (SFM) Event 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

### 1.3.3 Inventory Receipt and Purchase Order Receipt

If an item is set up as trackable in Install Base, then 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 Event Queue. It is automatically dequeued and processed to update Install Base. Refer to *Oracle Enterprise Install Base Implementation Guide* and *Oracle Enterprise Install 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, then 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.

### 1.3.4 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 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.

The supported Inventory transactions are as follows:

- Subinventory transfer
- Inter-organization transfer
- Cycle count adjustment
- Physical inventory adjustment
- Intransit receipt
- Intransit shipment
- Purchase order receipt
- Account alias issue and receipt

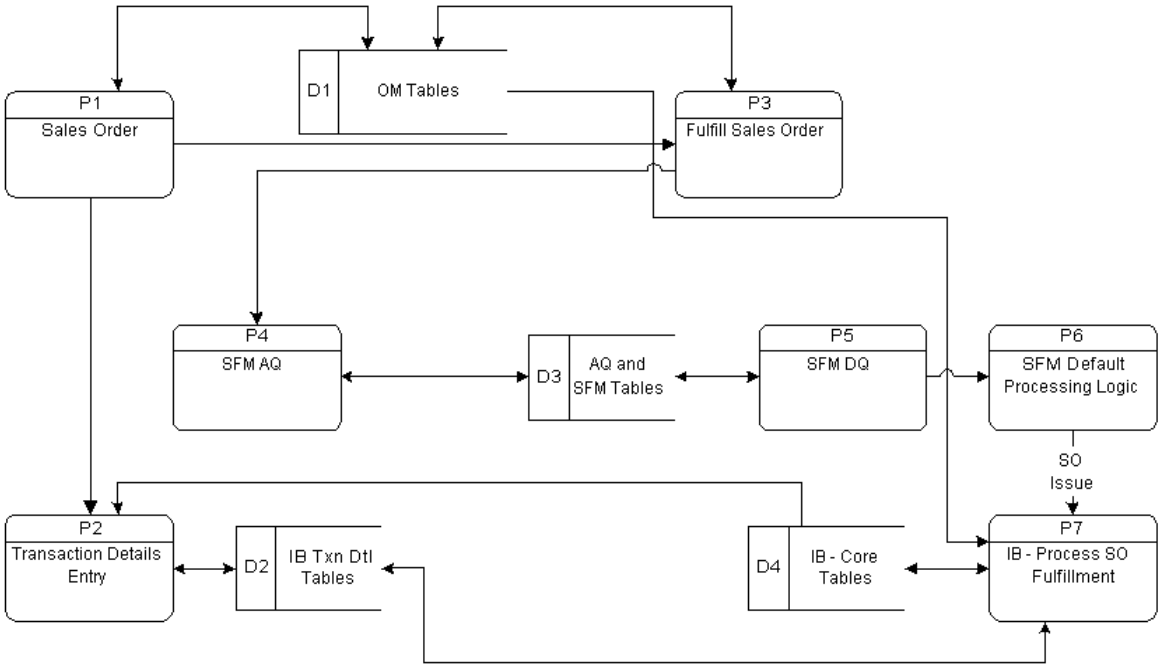
- Account issue and receipt
- Miscellaneous issue and receipt
- Sales order issue
- Sales order pick
- RMA receipt

The work-in-process inventory sourced transactions are described in Section 1.3.6, "WIP Integration".

### 1.3.5 Order Management Integration

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. Internal sales orders are not supported.

***Figure 1–1 Integration of Order Management with Install Base***




### 1.3.5.1 RMA Receipt

An RMA return receipt generates an inventory receipt material transaction in the Inventory application. If an item never existed in Install Base, then the RMA receipt causes a new instance to be created with the location in inventory. If the instance already exists in Install Base, then this return can cause a change of location to Inventory and other changes such as status and owner as specified in the transaction type setup used to process the transaction.

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.

An RMA without receipt for shippable and non-shippable items is not supported in this release.

Refer to Section 1.3.9 for information on the use of transaction detail. To use transaction detail, the transaction types being used have to be previously set up. Refer to Section 2.5.18 for instructions on setting up transaction types.

### 1.3.5.2 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 processing, Configurator enables 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 1.3.9 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 2.5.18 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 processing, Configurator enables 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.

#### 1.3.5.3 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, transaction detail can be invoked to specify additional details for this instance and other related instances for this

update to Install Base. Refer to Section 1.3.9 for information on the use of transaction detail.

To use the transaction detail, the transaction types being used must have been previously set up. Refer to Section 2.5.18 for instructions on setting up transaction types.

### 1.3.6 WIP Integration

The creation of a serialized top assembly instance with components configuration is supported for WIP jobs with quantity of one. For jobs with more than one top assembly, the components used are distributed equally for all the top assemblies. No fractional quantity is supported.

For example, if four components are issued to one top assembly in a WIP job with a quantity of two, then at the end, two components will be assigned to one assembly and two will be assigned to the other. This is true even if you issue all four components to only one top assembly. Creation of a non-serialized top assembly instance with component configuration is not supported, with the exception of an ATO item.

At the time of the WIP assembly complete inventory receipt, the interface generates an inventory receipt in Inventory. The integration point with WIP is strictly through the Inventory material transaction, not through any internal WIP transactions. 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. Only the components issued and returned before the assembly completion transaction are taken into consideration in the configuration buildup. Components issued and returned after the WIP assembly completion are ignored.

Only one level of configuration will be built for one WIP job. To process multiple levels of configuration, multiple jobs must be created and executed for sub-assemblies.

At the time of sales order shipment, the ownership and location are changed to that of the customer, depending on the transaction being used. The supported WIP material transactions are as follows:

- WIP component issue: A component will be set up in Install Base as a child in a component-of configuration for the top assembly at job completion
- WIP component return: A component will not be set up in Install Base as a child in a component-of configuration at job completion

- WIP negative (WIP -ve) component issue: A component will not be set up in Install Base as a child in a component-of configuration at job completion
- WIP-ve component return: A component will be set up in Install Base as a child in a component-of configuration for the top assembly at job completion
- WIP Assembly Completion: An assembly will be set up in Install Base as a parent in a component-of configuration with a location in inventory at job completion
- WIP Assembly Return: The location of an assembly instance will be changed from Inventory to that of a WIP job

### 1.3.7 Asset Integration

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

### 1.3.8 Project Integration

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

### 1.3.9 Use of Transactions 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.

The Transaction Details can be activated on the sales order line window by clicking Actions 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 for New Users

This chapter provides implementation and setup information for new users of Oracle Install Base. Refer to Chapter 3 if you have an earlier version of this application and are upgrading to this version.

This chapter covers the following topics:



## 2.1 Product Dependencies and Requirements

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

- Oracle Inventory
- Oracle Enterprise Install Base
- Oracle Service Fulfillment Manager
- Oracle Order Management
- Oracle Purchasing (Optional)
- Oracle Accounts Receivable
- Oracle Work in Process (Optional)
- Oracle Bills of Material

## 2.2 Setup Checklist for New Users

This following table provides a checklist of setup steps for new users of Oracle Install Base.

*Table 2–1 Setup Checklist for New Users of Oracle Install Base*

| Step Number | Title | Required or Optional | Seeded? | Extensible? | Section Reference |
|---|---|---|---|---|---|
| 1. | Synchronize On-Hand Balance between Inventory and Install Base | Required | NA | NA | Section 2.3.1 |
| 2. | Set Up Inventory Serial Control at the Master Level | Required | NA | NA | Section 2.3.2 |
| 3. | Set Up Parties | Required | N | N | Section 2.3.4 |
| 4. | Set Up Vendors | Optional | N | N | Section 2.3.5 |
| 5. | Set Up Employees | Optional | N | N | Section 2.3.6 |
| 6. | Set Up Party Accounts | Required | N | N | Section 2.3.7 |
| 7. | Set Up Party Contacts | Required | N | N | Section 2.3.8 |
| 8. | Confirm the Setup of Oracle Service Fulfillment Manager Event Queue | Required | N | N | Section 2.3.9 |
| 9. | Set Up the Action Menu in Order Management | Required | N | N | Section 2.3.10 |
| 10. | Set Up the Order Management Workflow | Required | N | N | Section 2.3.11 |
| 11. | Run the License Manager Program | Required | N | N | Section 2.4.1 |
| 12. | Verify the Setup of Four Profile Options for Enterprise Install Base | Required | N | N | Section 2.4.2 |
| 13. | Verify Location IDs in HZ_LOCATIONS | Required | Y | N | Section 2.4.3 |
| 14. | Verify Codes for Asset Update Statuses | Optional | Y | N | Section 2.4.4 |

*Table 2–1 Setup Checklist for New Users of Oracle Install Base*

| Step Number | Title | Required or Optional | Seeded? | Extensible? | Section Reference |
|---|---|---|---|---|---|
| **15.** | Set Up Installation Parameters | Required | N | N | Section 2.5.1 |
| **16.** | Set Up Codes for Party-Account and Party-Contact Relationship Types | Required | Y | Y | Section 2.5.2 |
| **17.** | Verify Codes for Instance Relationship Types | Required | Y | N | Section 2.5.3 |
| **18.** | Verify Extended Attribute-Level Codes | Required | Y | N | Section 2.5.4 |
| **19.** | Set Up Extended Attribute Pools | Optional | N | Y | Section 2.5.5 |
| **20.** | Set Up Extended Attribute Classifications | Optional | N | Y | Section 2.5.6 |
| **21.** | Set Up Extended Attributes | Optional | N | Y | Section 2.5.7 |
| **22.** | Verify Accounting Classification Codes | Required | Y | N | Section 2.5.8 |
| **23.** | Set Up Instance Type Codes | Optional | N | Y | Section 2.5.9 |
| **24.** | Verify Codes for Instance Location Sources | Required | Y | N | Section 2.5.10 |
| **25.** | Verify Party Sources | Required | Y | N | Section 2.5.11 |
| **26.** | Set Up Codes for Instance-Organization Unit Relationship Types | Required | Y | Y | Section 2.5.12 |
| **27.** | Set Up Version Labels | Optional | Y | Y | Section 2.5.13 |
| **28.** | Set Up System Type Codes | Required | N | Y | Section 2.5.14 |
| **29.** | Set Up Split Process Reasons | Optional | N | Y | Section 2.5.15 |
| **30.** | Set Up Instance Statuses | Required | Y | Y | Section 2.5.16 |
| **31.** | Set Up Source Transaction Types | Required | Y | Y | Section 2.5.17 |

***Table 2–1 Setup Checklist for New Users of Oracle Install Base***

| Step Number | Title | Required or Optional | Seeded? | Extensible? | Section Reference |
|---|---|---|---|---|---|
| **32.** | Set Up Transaction Subtypes | Required | Y | Y | Section 2.5.18 |
| **33.** | Set Up the Transaction Subtypes LOV from non-Service Processes | Required | Y | N | Section 2.5.19 |
| **34.** | Verify Transaction Status Codes | Required | Y | N | Section 2.5.20 |
| **35.** | Verify Transaction Error Source Types | Required | Y | N | Section 2.5.21 |
| **36.** | Create Business Users | Required | N | N | Section 2.5.22 |
| **37.** | Create Agent Users | Required | N | N | Section 2.5.23 |
| **38.** | Schedule the Expire End Dated Instances Program | Required | N | N | Section 2.5.24 |
| **39.** | Schedule the Initiate Mass Edit Program | Required | N | N | Section 2.5.25 |
| **40.** | Schedule the Process Mass Edit Program | Required | N | N | Section 2.5.26 |
| **41.** | Schedule the Process Old Order Lines-Fulfillable Only Program | Required | N | N | Section 2.5.27 |
| **42.** | Schedule the Resubmit Interface Process | Required | N | N | Section 2.5.28 |
| **43.** | Schedule the Resubmit Waiting Transactions Program | Required | N | N | Section 2.5.29 |
| **44.** | Final Synchronize On-Hand Balance between Inventory and Install Base | Required | NA | NA | Section 2.5.30 |

# 2.3 Related Setup Steps within Other Oracle Applications

## 2.3.1 Synchronize On-Hand Balance between Inventory and Install Base

To maintain life-cycle tracking for all items that are to be tracked in Install Base, it maintains a mirror image of what is in Inventory. For new implementations of Install Base, all on-hand quantities of Install Base trackable items must be issued out of Inventory. Oracle suggests that you use the miscellaneous issue transaction in Inventory to do this step.

You receive these items back into Inventory at Step 44 in the checklist. Refer to Section 2.5.30 for related information.

## 2.3.2 Set Up Inventory Serial Control at the Master Level

Install Base requires that the serial control of Install Base trackable items is set up in the master organization for Install Base to support the continuous tracking through all organizations.

## 2.3.3 Set Up Install Base Items in the Item Master

All items that need to be tracked in Oracle Install Base and Enterprise Install Base are set up as Install Base 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 Network Logistics trackable or a service item such as a contract. It cannot be both.

For an item to be set up as trackable in Install Base, Installed Base Trackable has to be selected on the Service tabbed page of the Master Item window. Depending on the revision of the Inventory application, Installed Base Trackable may not be on the Service tabbed page. In this case, select Network Logistics Trackable on the Inventory tabbed page of the Master Item window. An item has to be set up in the global master item, and it must be assigned to the inventory organizations that use it.

To create a warranty for a product instance, the service item of the contract must be part of the BOM of the top assembly item.

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

Refer to Section 1.3.2, "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.

### 2.3.4 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*.

### 2.3.5 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 set up vendors, consult Oracle Purchasing implementation guides.

### 2.3.6 Set Up Employees

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

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

### 2.3.7 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*.

### 2.3.8 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*.

## 2.3.9 Confirm the Setup of the Oracle Service Fulfillment Manager Event Queue

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

Install Base is dependent on SFM's Event Manager Queue Service. The setup steps for SFM's Event Manager Queue Service are listed below.

### SFM Installation & SFM Post-Install Steps (One-Time)

It is critical that the Generic Service Management (GSM) post-install steps are done correctly. Otherwise, the SFM Event Manager Queue Service will not be activated. Contact Oracle Customer Support for a list of specific patch requirements.

### Additional Manual Installation Step (One-Time)

SFM provides a Queue Console with which a DBA can see the number of events sitting in the Event Manager Queue Service. When SFM is installed in Shared Mode, which is the case for Install Base, the Queue Console form must be manually compiled. This form is in $XDP_TOP/forms/US/XDPADQCS.fmb.

### Deactivate Services that Are Not Used (One-Time)

When a DBA starts the Internal Concurrent Manager (ICM), this automatically starts SFM Services that are registered with GSM. Because Install Base is using only the SFM Event Manager Queue Service, all other SFM Services can be deactivated. To do this:

#### Steps

1. Log into Oracle Applications with SFM System Administrator responsibility.
2. From the Navigator menu, select Concurrent > Administer Manager.
3. Deactivate all services that appear except the SFM Event Manager Queue Service.

### Setup to ensure the Serializability of transactions processed in Install Base (One Time)

At any one time several transactions originating from Inventory and Order Management can be processed in Install Base. To eliminate the errors that can occur

due to the concurrent execution of these transactions, the following steps must be performed to ensure the serilizability of these transactions:

### Steps

1. Log into Oracle Applications.
2. Navigate to System Administrator > Concurrent > Manager > Define.
3. Query for the Manager SFM Event Manager Queue Service.
4. Click Work Shifts.
5. Change the processes to 1.
6. In the Parameter field, change the value of XDP_DQ_INIT_NUM_THREADS to 1 (XDP_DQ_INIT_NUM_THREADS=1).
7. Stop and restart the SFM Event Manager Queue.

### Monitor SFM's Event Manager Queue Service (Daily Basis)

If a DBA wants to check whether SFM's Event Manager Queue Service is running, this can be done from any of the following places:

- SFM's Queue Console - this provides the status as well as the queue size.
- Concurrent Manager's Administer Manager Form - this provides the status.
- Oracle Application Manager's SFM page - this page is in HTML. It allows a DBA to see the Event Manager Queue Service status and Queue Size.

## 2.3.10 Set Up the Action Menu in Order Management

This menu setup is required so that Transaction Details and Maintain Systems windows are set up as part of the Action menu.

### Steps

1. Log on to Oracle Applications with the System Administrator responsibility.
2. Choose Applications > Menu.
3. Choose View > Query By Example > Enter.
4. In the Menu field, enter the string `ONT_SALES_ORDERS`.
5. Choose View > Query By Example > Run.
6. Go to the last record in the multi-record details block.

7. Choose File > New to create new records with the following Field Values:
   a. Seq: Choose the next sequence.
   b. Function: Select Installed Base Transaction Details from the list of values.
   c. Seq: Choose the next sequence.
   d. Function: Select IB Maintain Systems from the list of values.
8. Save the record.

## 2.3.11 Set Up the Order Management Workflow

For sales orders to interact with Install Base for non-shippable items, the background workflow must be run in a certain sequence or the sales order workflow must be set up.

### 2.3.11.1 Interface Non-Shippable Items to Install Base without Workflow Customization

To interface non-shippable items to Install Base without Workflow customization:

#### Steps

1. Place an order for a non-shippable item through Order Management.
2. Book the order.
3. Run the Workflow background process with the following parameters:
   - Item Type = Sales for Communications
   - Minimum Threshold = Null
   - Maximum Threshold = Null
   - Process Deferred = Yes
   - Process Timeout = No
   - Process Stuck = No
4. After the above process has completed successfully, run the Workflow background process with the following parameters:
   - Item Type = OM Order Line
   - Minimum Threshold = Null
   - Maximum Threshold = Null

- Process Deferred = Yes
- Process Timeout = No
- Process Stuck = No

5. After the above process has completed successfully, run the Workflow background process with the following parameters:
   - Item Type = Sales for Communications
   - Minimum Threshold = Null
   - Maximum Threshold = Null
   - Process Deferred = Yes
   - Process Timeout = No
   - Process Stuck = No
6. After you are sure the process has completed successfully, you can see an instance created in Install Base. These workflow processes can be scheduled to run at regular intervals as required.

#### 2.3.11.2 Interface Non-Shippable Items to Install Base with Workflow Customization

To update the workflow in Workflow Builder for Fulfill-only workflows:

### Steps

1. Log on to Oracle Workflow Builder on your client PC using the apps user ID, password, and connect string to connect to the database to customize the workflows.
2. Select Sales for Communication, OM Order Line from Show Item Types window.
3. Move them to the Visible Window.
4. Click Open.
5. In the navigator, select Sales for Communication > Functions > Installed Base Interface.
6. Right-click and choose Copy.
7. Select OM Order Line > Functions.
8. Right-click and choose Paste.

9. Select OM Order Line > Processes.
10. Right-click the Order Line that you want to customize, and choose Copy.
11. Right-click again and choose Paste.
12. Enter a different internal name for the newly created process.
13. Double-click the newly created process to open it.
14. Click New Function on the Top icon bar.
15. Click the Internal Name Pull Down list, and choose Install Base Interface.
16. Delete the line after the Fulfill function (the line going out from Fulfill to the node after Fulfill).
17. Pull the Install Base Interface after the Fulfill function.
18. Right-click Fulfill, and drag it to Install Base Interface.
19. Right-click Install Base Interface, and drag it to the node after Fulfill. For the option results, choose Any.
20. Save and Exit.

To set up Order Management changes in applications:

### Steps

1. Order Management Super User > Setups > Transaction Types.
2. Query the desired transaction type that you plan to use on the sales orders.
3. Click Assign Work Flows.
4. End-date the current line type that used the seeded workflow.
5. Create another record with the same line type as the one that was expired.
6. Tie the Customized Workflow process name created in Workflow to the this line type.

To process sales orders:

### Steps

1. Place an order for a non-shippable item through Order Management using this customized line type.
2. Book the sales order.
3. Run the OM Workflow background process or schedule it.

4. View the instance created in Install Base.

## 2.4 Related Setup Steps within Oracle Enterprise Install Base

### 2.4.1 Run the License Manager Program

Run this program to license Enterprise Install Base only if you have not installed Enterprise Install Base. It enables Enterprise Install Base functionality for inventory receipts and other processing required for Install Base.

### 2.4.2 Verify the Setup of Four Profile Options for Enterprise Install Base

This is required only if you have not installed Enterprise Install Base. Confirm that the following profile options were set up:

- MO: Operating Unit (Indicates the Inventory Master Organization)
- CSE: Debug Option (Y or N)
- CSE Debug Log Directory (path name)
- CSE Bypass Event Queue (N)

### 2.4.3 Verify Location IDs in HZ_LOCATIONS

The following locations must be defined in the HZ_LOCATIONS table before using them in Install Base:

***Table 2–2 Locations that Must Be Defined in the HZ_LOCATIONS Table***

| 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*.

### 2.4.4 Verify Codes for Asset Update Statuses

Type: CSI Lookup

Lookup Type: CSI_ASSET_UPDATE_STATUS

Access Level: Non-extensible

Verify that the following values are already seeded for CSI_ASSET_UPDATE_STATUS.

***Table 2–3 Seeded Values for CSI_ASSET_UPDATE_STATUS***

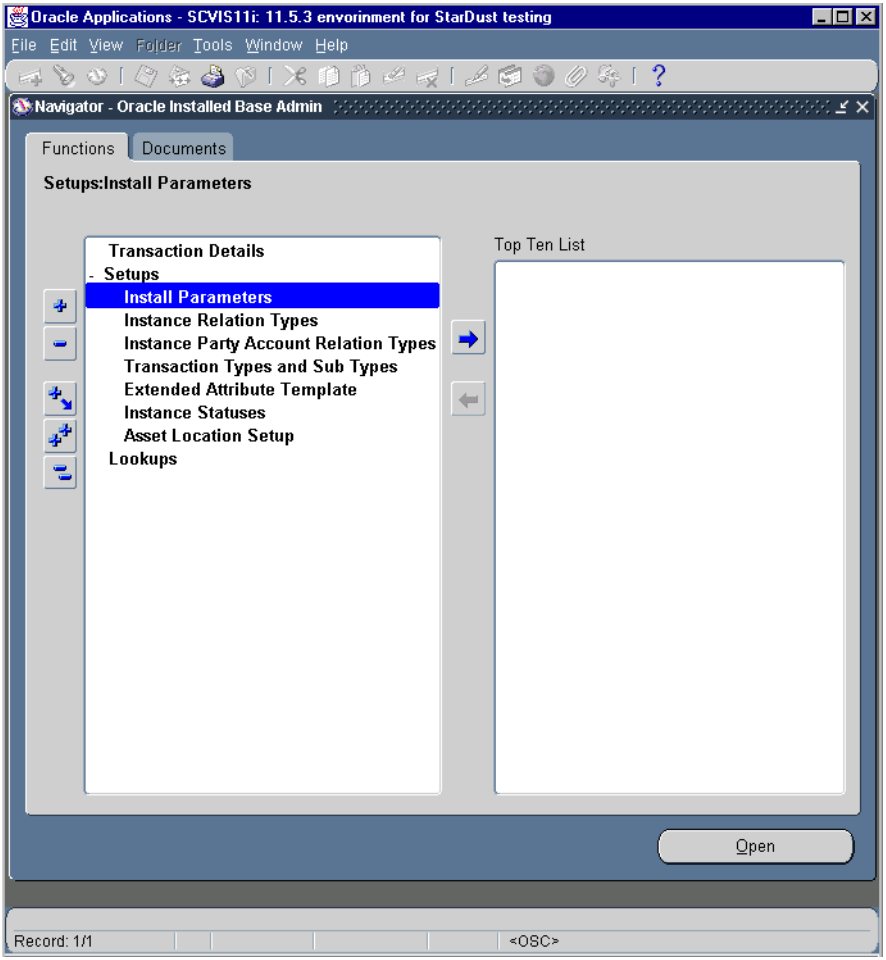
| Lookup Code | Meaning | Description |
|---|---|---|
| IN-SERVICE | In-Service | In-Service |
| RETIRED | Retired | Retired |

Refer to the *Oracle Enterprise Install Base Implementation Guide* for details.

## 2.5 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. You access these through the Oracle Installed Base Admin responsibility. Online help for the Install Base Lookups window provides information about lookups.

*Figure 2–1 Navigation for Install Base Setups*




## 2.5.1 Set Up Installation Parameters

Install Base keeps a set of customer-specific installation parameters defined in a table at setup time. You use the Installed Parameters window to provide them. After you define them and select Freeze, the fields cannot be updated.

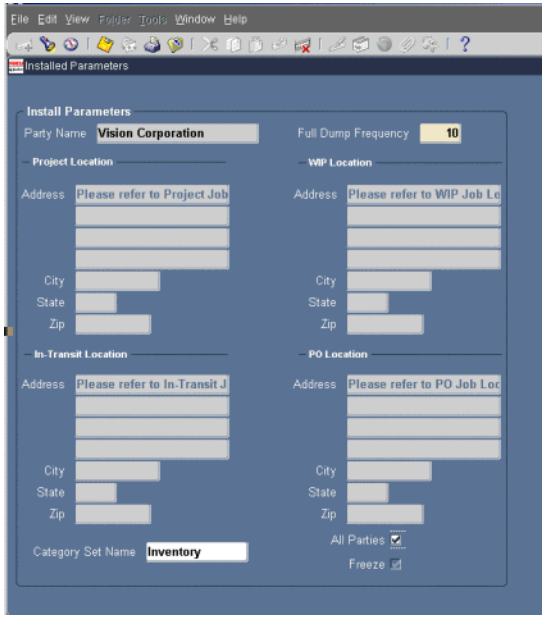
The migration procedure populates the table with default data. After migration, you open the window for update before the freeze takes effect.

Oracle Installed Base Admin responsibility: Setups > Install Parameters

The following list defines the fields in the Installed Parameters window.

- Party Name: The internal party name of the Install Base organization. This organization is the owner of all instances that are mapped to Inventory on-hand balances. This party ownership is the only internal party supported. Product transfer from this party is not supported. This organization cannot be changed after it is set. For upgrade customers, this setup is done by setting a profile: Service: Migration Organization for Employee Service Requests. Caution: This party should not be used as the object of merge in the TCA merge routines.
- Full Dump Frequency: The number of updates of an Install Base record before a full image of the record is dumped into the history table. For example, HISTORY_FULL_DUMP_FREQUENCY=10 means that every 10th update made to a record in any Install Base table is followed by a complete dump of record's image (changed as well as unchanged columns) in the corresponding history table. For the remaining nine updates, only the changed values are dumped into the history table.
- Project Location: The location defined for the use of instances in Project.
- WIP Location: The location defined for use of instances in WIP.
- In-Transit Location: The location defined for use of instances in transit between organizations.
- PO Location: The location defined for use of instances in WIP outside processing.
- Category Set Name: The name of the category set to be used in the additional attributes setup.
- All Parties Locations: If selected, then all parties and locations are made available for transfer and location change. If it is cleared, then only related parties and locations are made available for transfer and location changes.
- Freeze: After this is selected, the parameters cannot be changed.

*Figure 2–2 Installed Parameters Window*




## 2.5.2 Set Up Codes for Party-Account and Party-Contact Relationship Types

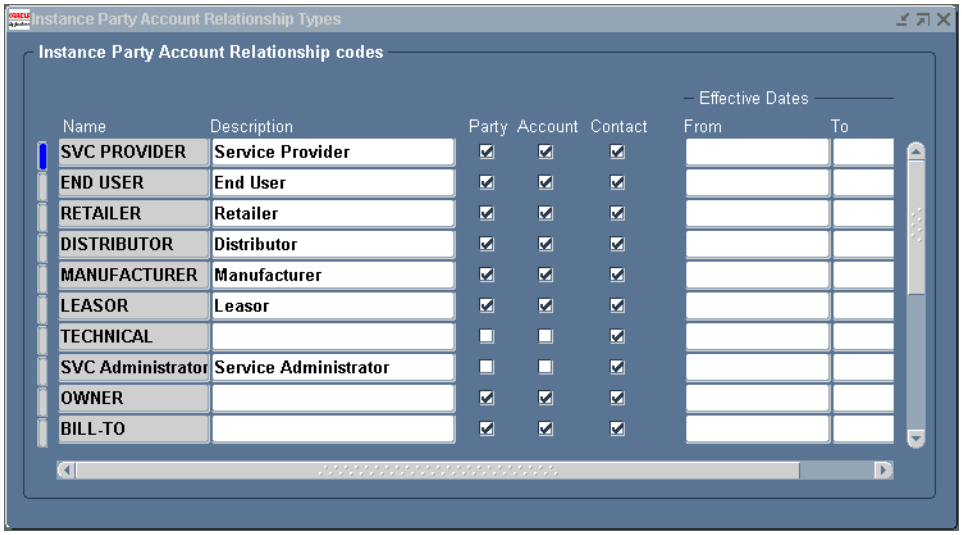
The instance party account relationship codes define the types of relationship that can be set up for parties, accounts, and contacts. The six seeded relationship types are as follows:

*Table 2–4 Seeded Relationship Types*

| Name | Party Selected? | Account Selected? | Contact Selected? |
|---|---|---|---|
| OWNER | Y | Y | N |
| BILL-TO | Y | Y | Y |
| SHIP-TO | Y | Y | Y |
| SOLD-TO | Y | Y | N |
| TECHNICAL | N | N | Y |
| SERVICE-ADMINISTRATION | N | N | Y |

You can set up additional relationship type codes for party, account, and contact and define them by selecting the appropriate checkboxes in the following window.

***Figure 2–3 Window for Instance Party Account Relationship Types***




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

## 2.5.3 Verify Codes for Instance Relationship Types

Install Base supports the eight types of instance-to-instance relationship shown in Table 2–5.

***Table 2–5 Relationship Type Codes***

| 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 |

*Table 2–5 Relationship Type Codes*

| RELATIONSHIP TYPE CODE | NAME | RELATIONSHIP DIRECTION |
|---|---|---|
| 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 |

Component-of is the only relationship type that supports the flow-down of the current location and the installation location from parent to child.

From the OM-IB shipment/fulfillment integration, component-of configuration can be created through the BOM explosion, PTO model, and ATO model. Refer to Section 1.3.5 for details on this integration.

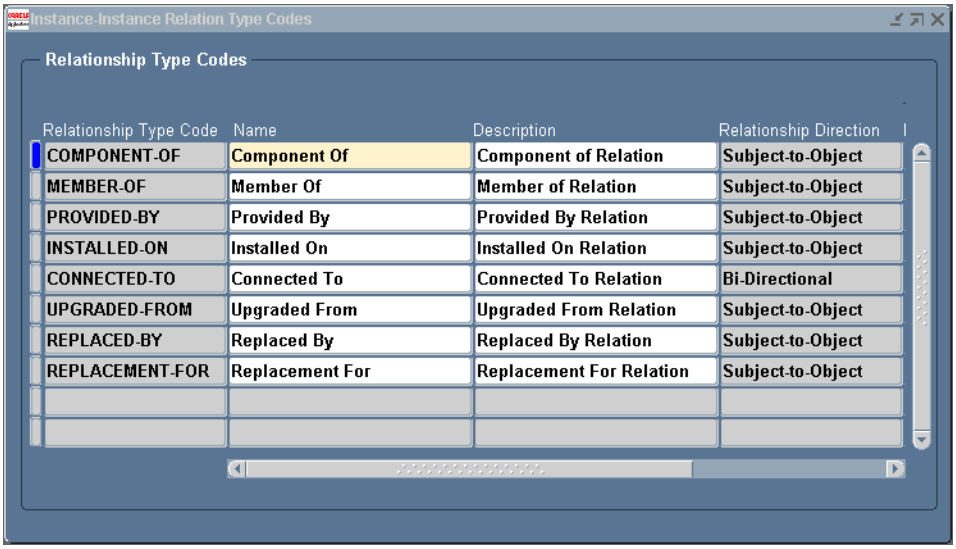
From the WIP-IB integration, component-of configuration can be created through the WIP assembly completion into inventory. Refer to Section 1.3.6 for details on this integration.

Replaced-by and replacement-for relationship types are created only by the OM-IB integration using the Transaction Details window. They are set up as `transaction only`. For further information, refer to "Using the Transaction Details Window" in *Oracle Install Base Concepts and Procedures*.

All other relationship types can be used in setting up multiple relationship types for the same instance. No location flow-down rules apply.

Verify that the standard instance statuses are seeded by checking the content of the Relationship Type Codes window.

*Figure 2–4 Relationship Type Codes Window*




## 2.5.4 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 2–6 describes the four levels of extended attributes that you can define for Install Base items. These are the extended attributes that are used in the Extended Attribute page of the application.

*Table 2–6 Levels of Extended Attributes for Install Base Items*

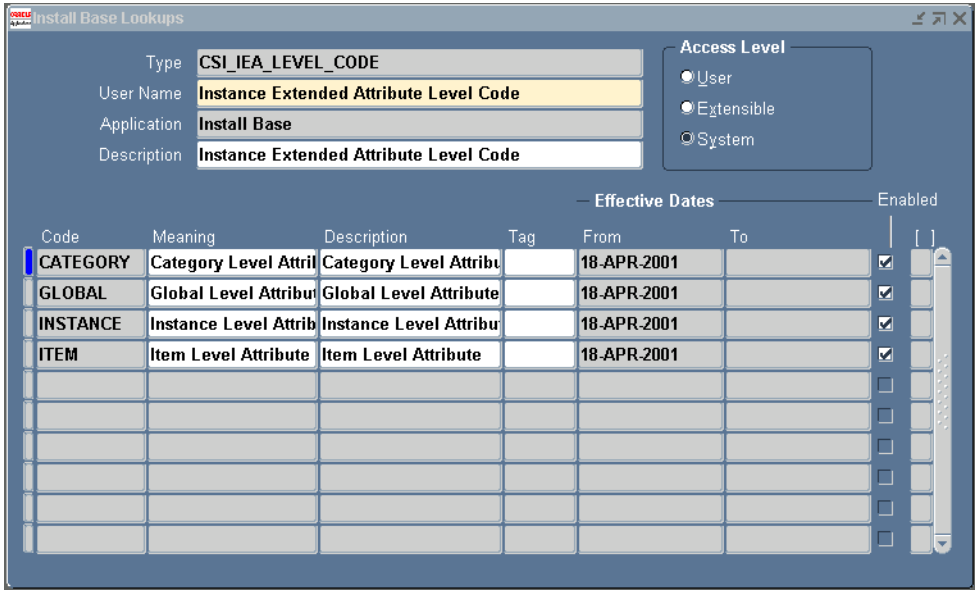
| Lookup Code | Meaning | Description |
|---|---|---|
| GLOBAL | Global | Applicable to all item instances in Install Base |
| CATEGORY | Category | Applicable to the items of the category for which the extended attributes are defined |

*Table 2–6 Levels of Extended Attributes for Install Base Items*

| Lookup Code | Meaning | Description |
|---|---|---|
| ITEM | Item | Applicable to all instances of the item type for which the extended attribute is defined. |
| INSTANCE | Instance | Applicable only to the instance for which the extended attribute is defined. |

Use the Install Base Lookups window to verify that these codes are seeded for type CSI_IEA_LEVEL_CODE.

*Figure 2–5 Lookups for Extended Attribute Level Codes*




## 2.5.5 Set Up Extended Attribute Pools

Type: CSI Lookup

Lookup Type: CSI_EXTEND_ATTRIB_POOL

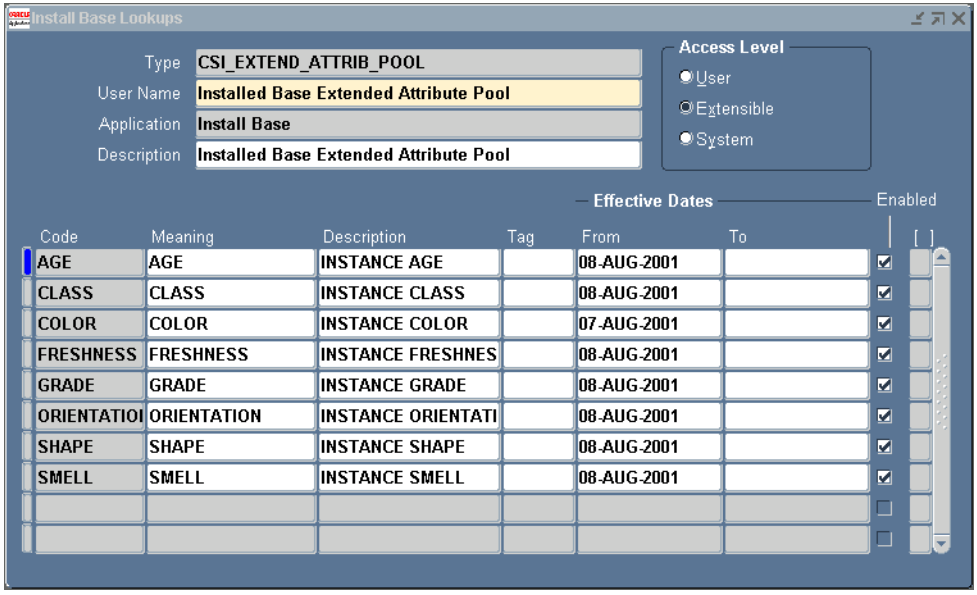
Access Level: Extensible

Values are not seeded for this code.

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

To set up extended attributes, the name and code of the attribute have to be set up in the pool of attributes. This is where users can define an attribute's name, code, and description to be used in the LOV when the extended attribute is set up.

***Figure 2–6 Lookups for Extended Attribute Pool***




## 2.5.6 Set Up Extended Attribute Classifications

Type: CSI Lookup

Lookup Type: CSI_IEA_CATEGORY

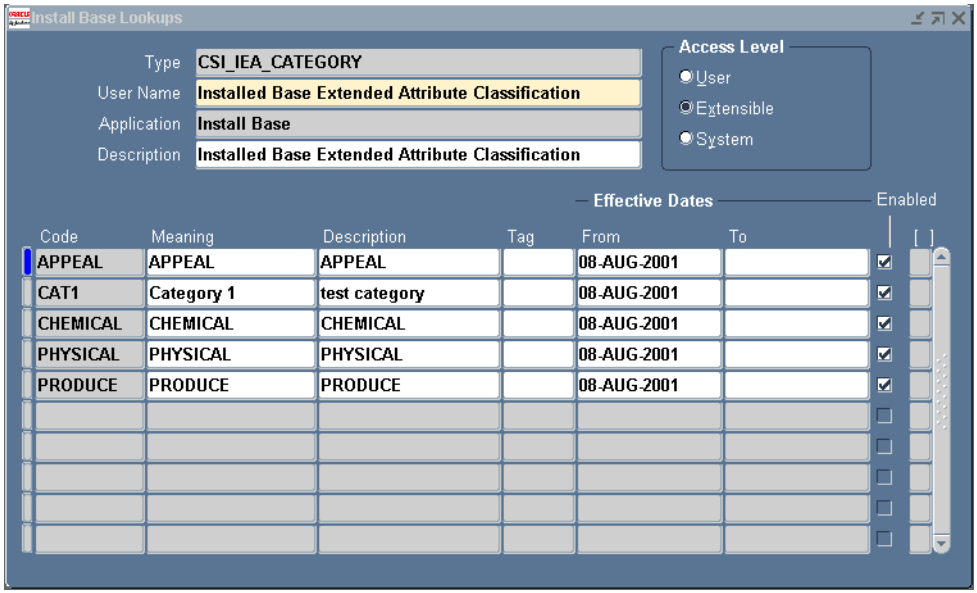
Access Level: Extensible

Values are not seeded for this code.

Optionally define extended attribute classifications such as chemical and physical.

To set up extended attribute classifications, the name and code of the attribute have to be set up in the pool of attributes (see Section 2.5.5). Then each attribute can be classified into category. This is the table where a user can define the categories by which an attribute can be classified from a LOV in the extended attribute setup.

***Figure 2–7 Lookups for Extended Attribute Classifications***




## 2.5.7 Set Up Extended Attributes

The extended attributes used for Install Base item instances must be defined in the Extended Attributes window.

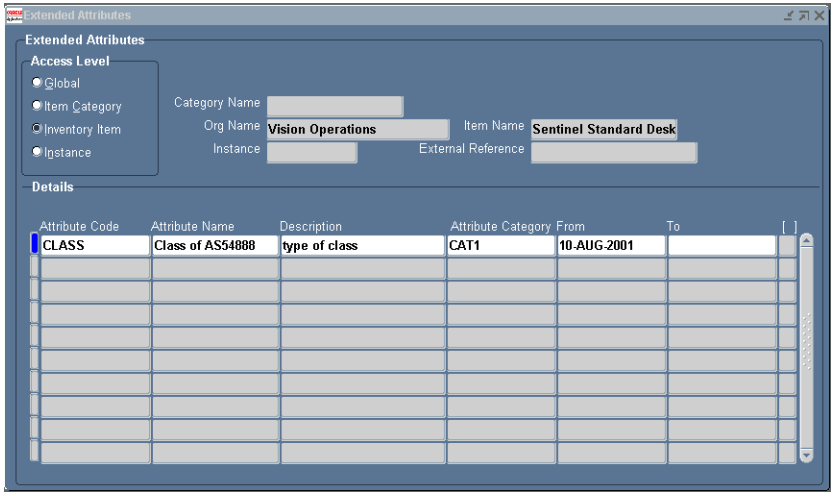
Four levels of extended attributes can be defined for Install Base items:

- 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***




## 2.5.8 Verify Accounting Classification Codes

Type: CSI Lookup

Lookup Type: CSI_ACCOUNTING_CLASS_CODE

Access Level: Non-extensible

Verify that the following values are already seeded for CSI_ACCOUNTING_CLASS_CODE:

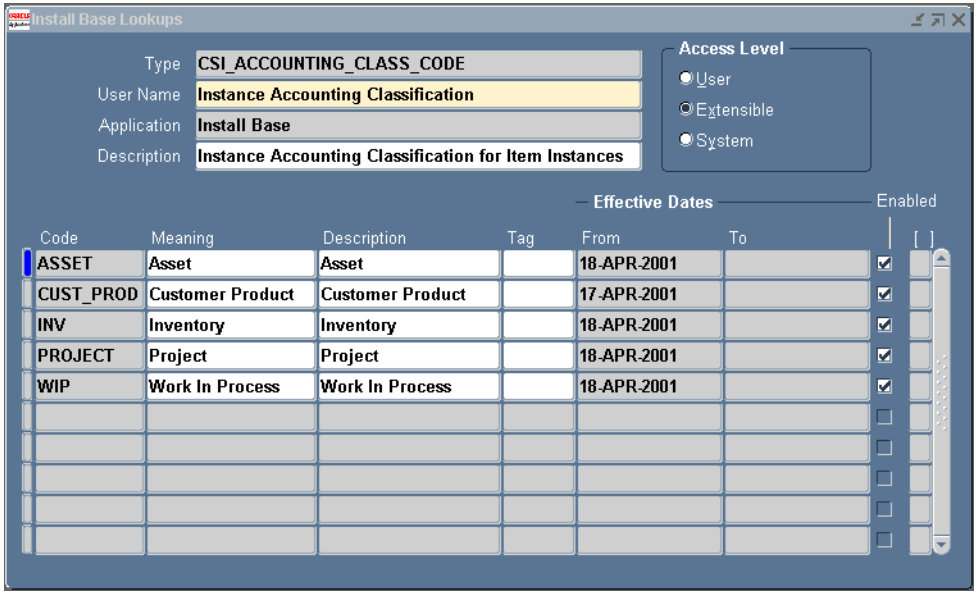
***Table 2–7 Accounting Classification Codes***

| Lookup Code | Meaning | Description |
|---|---|---|
| INV | Inventory | Inventory |
| ASSET | Asset | Asset |

*Table 2–7 Accounting Classification Codes*

| Lookup Code | Meaning | Description |
|---|---|---|
| WIP | Work In Process | Work In Process |
| PROJECT | Project | Project |
| CUST_PROD | Customer Product | Customer Product |

*Figure 2–9 Setup for Accounting Classification Codes*




## 2.5.9 Set Up Instance Type Codes

Type: CSI Lookup

Lookup Type: CSI_INST_TYPE_CODE

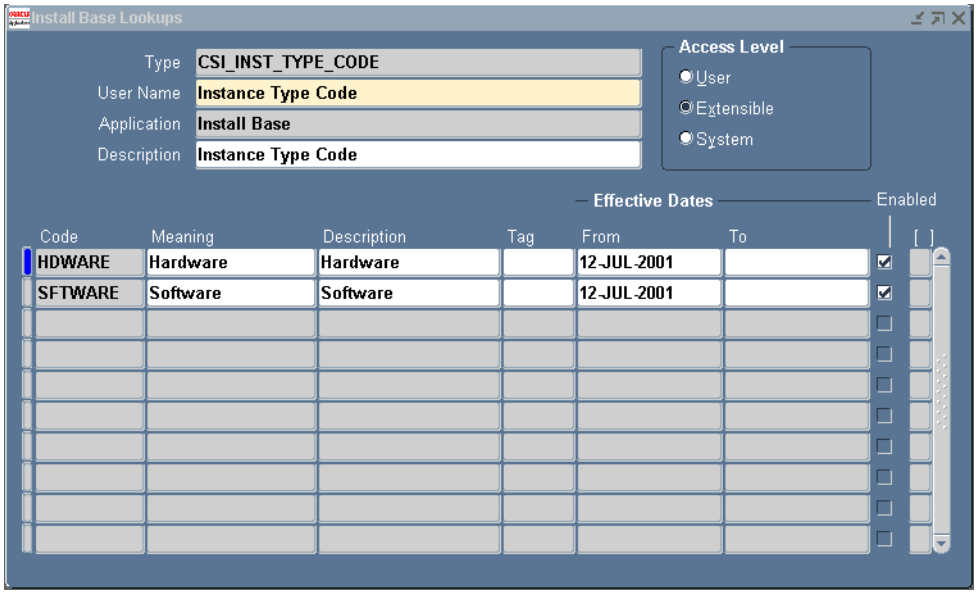
Access Level: Extensible

No values are seeded for CSI_INST_TYPE_CODE.

Define the instance type codes used by your organization. You can enter any value. Examples of instance types are Hardware, Software, and Service. This code is an

optional classification for an instance and is used in the general attributes page in the application.

***Figure 2–10 Setup of Instance Type Codes***




## 2.5.10 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 2–8 Instance Location Source Codes***

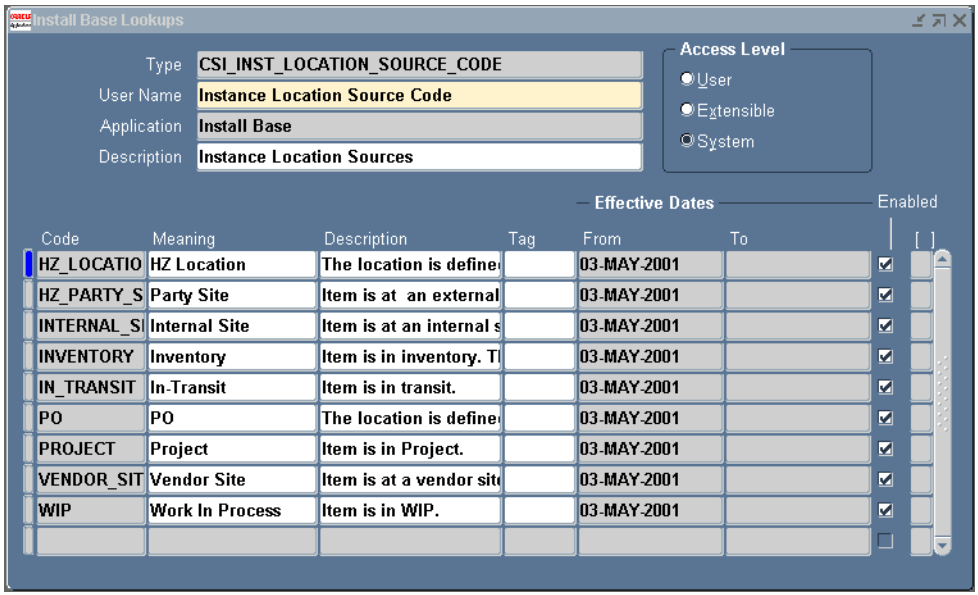
| Lookup Code | Meaning | Description |
|---|---|---|
| HZ_LOCATIONS | HZ Location | The Location is defined in HZ_LOCATIONS table. |

***Table 2–8 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 are the types of locations that are supported in Install Base.

***Figure 2–11 Setup for Instance Location Source Codes***




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

## 2.5.11 Verify Party Sources

Type: CSI Lookup

Lookup Type: CSI_PARTY_SOURCE_TABLE

Access Level: Non-Extensible

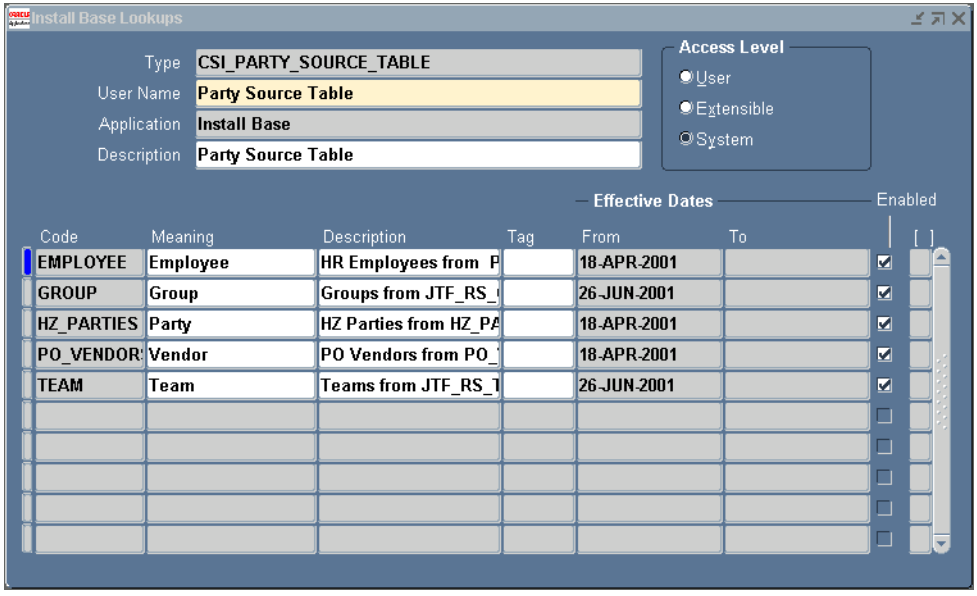
Verify that the following values are already seeded for CSI_PARTY_SOURCE_TABLE.

***Table 2–9 Party Sources Codes***

| 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. |

This table is not extensible. It defines the types of parties that are supported in Install Base for an instance. For example, an owner can be a party (such as a customer), an employee, or a vendor. A party that provides support can be a team or a group.

***Figure 2–12 Setup for Party Sources***




## 2.5.12 Set Up Codes for Instance-Organization Unit Relationship Types

Type: CSI Lookup

Lookup Type: CSI_IO_RELATION_TYPE_CODE

Access Level: Extensible

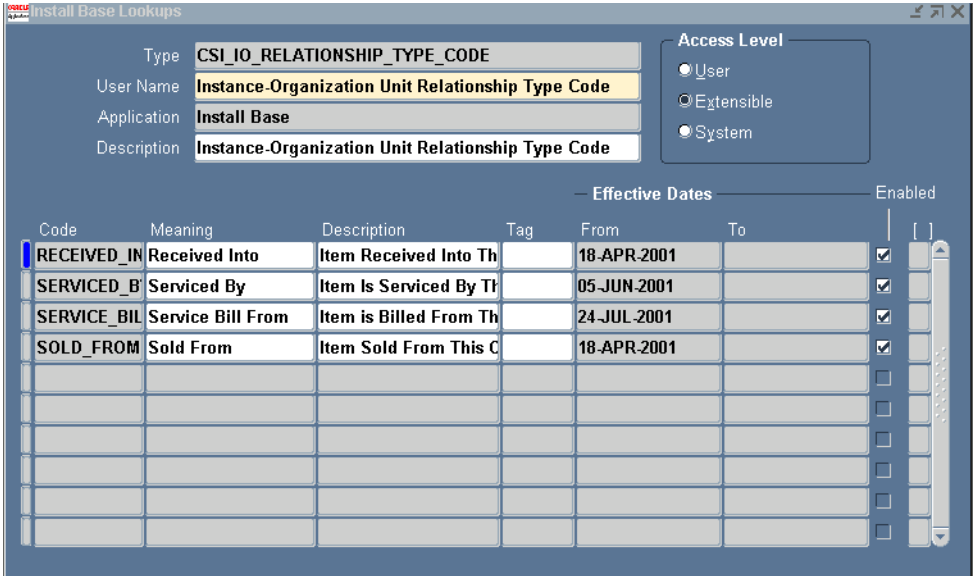
Verify that the following values are already seeded for the CSI_IO_RELATION_TYPE_CODE

***Table 2–10 Codes for Instance-Organization Unit Relationship Types***

| 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. |
| SERVICE_BILLED_FROM | Service billed from | The organization that gets the credit from Billing. |

Define new instance-to-operating units organization codes specific to your organization. Install Base has limited functionality behind this instance-organization unit association. It is for information only. The SOLD-FROM relationship is created each time an instance is sold from an organization.

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




## 2.5.13 Set Up Version Labels

Type: CSI Lookup

Lookup Type: CSI_INSTANCE_VERSION_LABELS

Access Level: Extensible

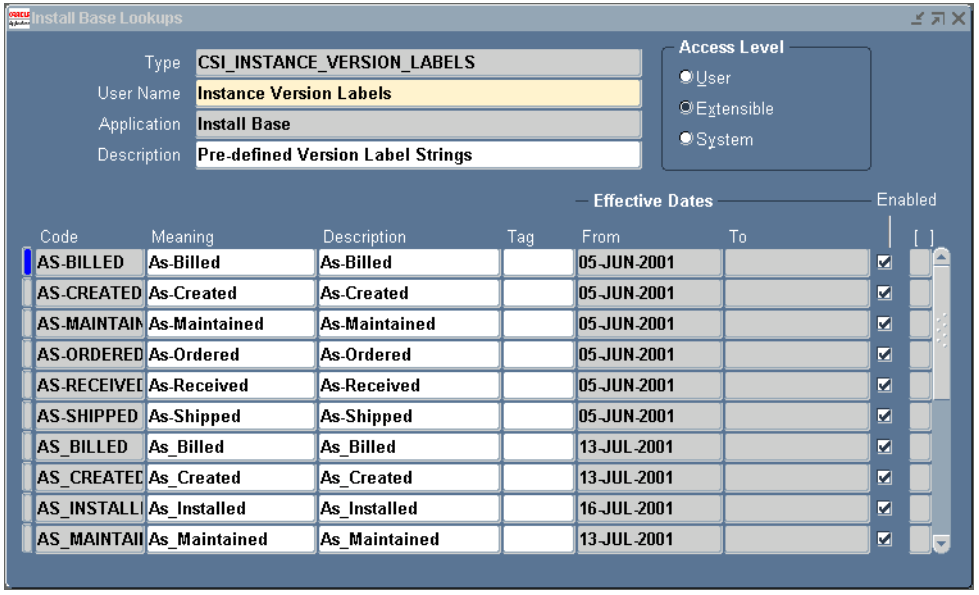
Verify that the following values are already seeded for CSI_INSTANCE_VERSION_LABELS.

***Table 2–11 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. This table of codes is used as a source of the LOV for the profile option setup in Default Version Label. It is used as a default when an instance is first created.

***Figure 2–14 Lookups for Version Labels***



## 2.5.14 Set Up System Type Codes

Type: CSI Lookup

Lookup Type: CSI_SYSTEM_TYPE

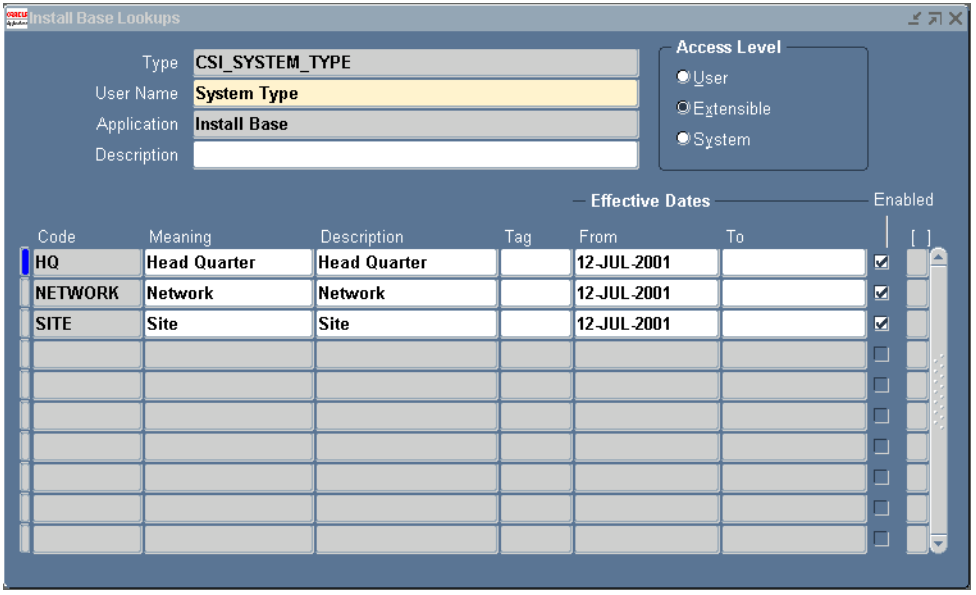
Access Level: Extensible

No values are seeded for CSI_SYSTEM_TYPE.

When a system is created, a type can be selected from an LOV. This table is where user-defined system types can be set up for use in the LOV.

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

***Figure 2–15 Setup of System Types***




## 2.5.15 Set Up Split Process Reasons

Type: CSI Lookup

Lookup Type: CSI_SPLIT_REASON_CODE

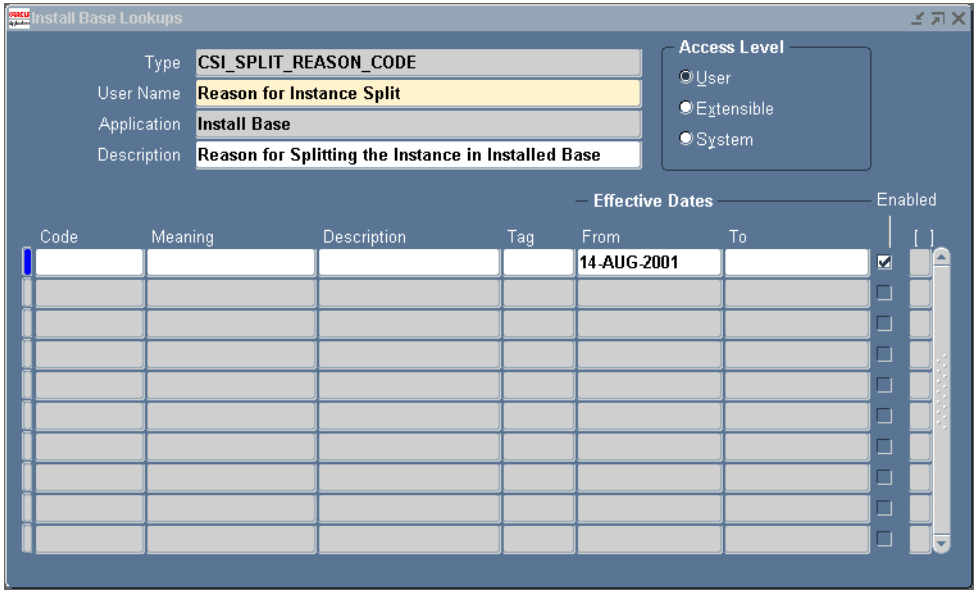
Access Level: Extensible

No values are seeded for CSI_SPLIT_REASON_CODE

Define split reasons to be used in your organization.

When an instance with a quantity greater than 1 is split, a reason code can be selected for the reason for the split. This is the window where the reason codes can be set up for use in an LOV.

***Figure 2–16 Setup of Split Reason Codes***




## 2.5.16 Set Up Instance Statuses

Instance statuses are user-extendible and are defined using a combination of settable flags.

***Table 2–12 CSI Instance Statuses***

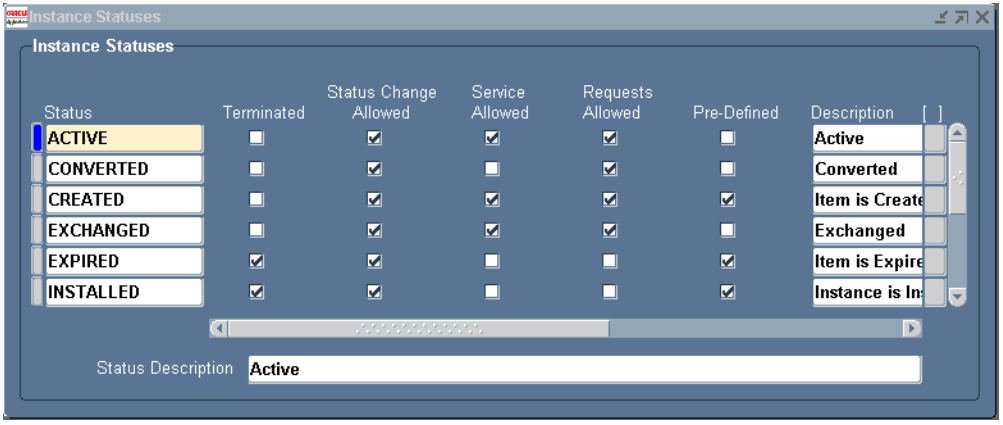
| Name | Terminate | Status Change Allowed | Service Allowed | Request Allowed | predefined | Updatable |
|---|---|---|---|---|---|---|
| Created | N | Y | Y | Y | Y | N |
| Expired | Y | Y | N | N | Y | N |
| Latest | N | Y | Y | Y | Y | N |
| Loaner | N | Y | N | Y | Y | N |
| Repaired | N | Y | Y | Y | Y | N |
| Replaced | N | N | N | N | Y | N |
| Replaced - No Return | Y | Y | N | N | Y | N |
| Replacement | N | Y | Y | Y | Y | N |
| Return for Replacement | Y | Y | N | N | Y | N |
| Returned for Credit | N | Y | N | N | Y | N |
| Returned for Repair | N | Y | Y | N | Y | N |
| Returned for Upgrade | N | Y | Y | N | Y | N |
| Returned Loaner | N | Y | N | N | Y | N |
| Spare Part | N | Y | Y | Y | Y | N |
| Updated | N | Y | Y | Y | Y | N |
| Upgraded | N | Y | Y | Y | Y | N |

There are 16 seeded statuses.

The meaning of the checkboxes 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 active for the instance with this status. If set to No, then the service contract will be called to terminate the contract
- Requests Allowed: Service request can be created for an instance with this status.
- Pre-Defined: Seeded
- Updatable: The checkboxes on this status can be updated

***Figure 2–17 Instance Statuses Window***




## 2.5.17 Set Up Source Transaction Types

Before any source transaction can be used in the LOV for a transaction subtype, it must be defined in this setup. All integration sources and transaction types must be defined here before they can be used to update Install Base. Values can be seeded or user-defined.

### Window Fields

Application Name: An LOV of Oracle Applications that can be set up to integrate into Install Base.

Transaction Type: The user-defined name of the kind of transaction that integrates with Install Base from the application named.

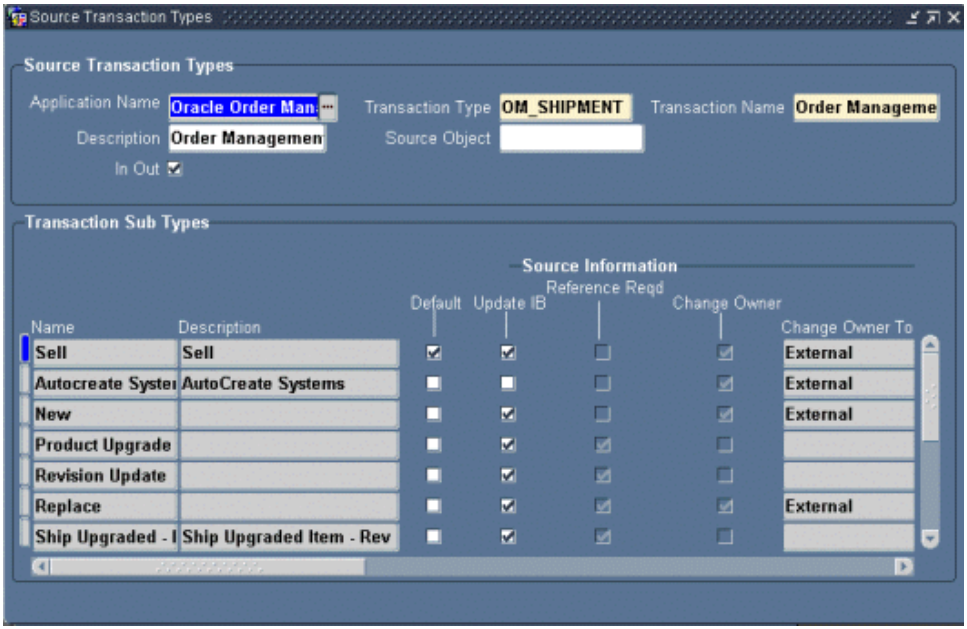
Transaction Name: The user-defined name of the transaction.

Description: The user-defined description of the transaction.

Source Object is for future use

In Out is for future use

***Figure 2–18 Source Transaction Types Window***

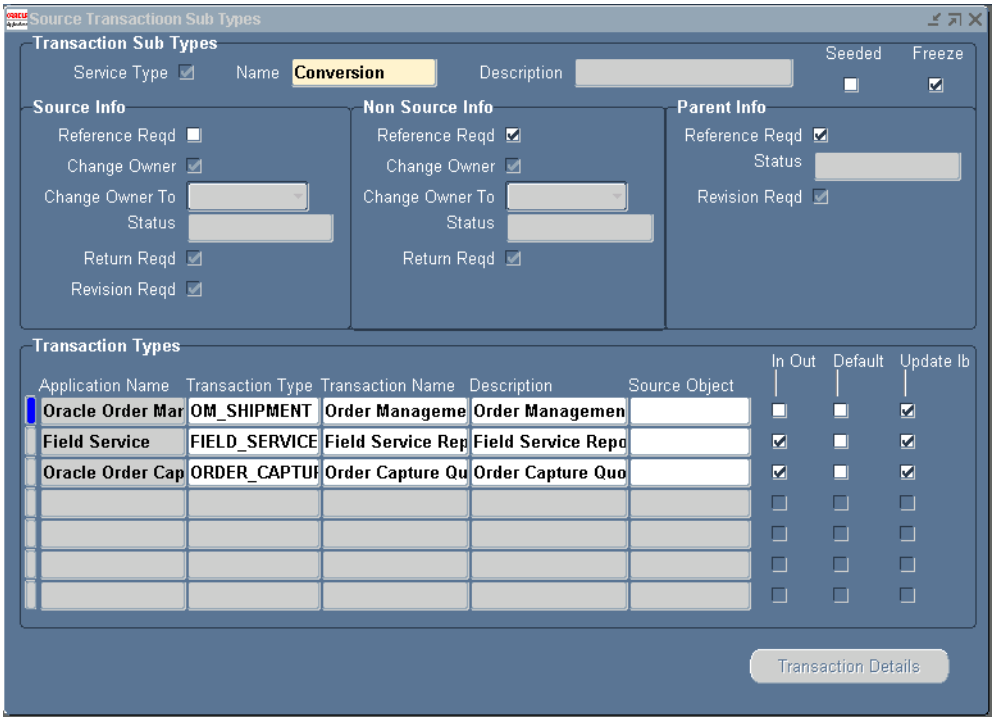



## 2.5.18 Set Up Transaction Subtypes

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 Subtypes 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.

***Figure 2–19 Source Transaction Subtypes Window***




## Window Regions

### Transaction Subtypes Region

This region is used to define the name of the transaction subtype. The name can come form two sources, depending whether the Service Type checkbox is selected or not:

- If Service Type is selected, then the LOV comes from the Service Transaction Billing Types setup.

- If Service Type is not selected, then the LOV comes from the Install Base Transaction Type code setup. Refer to the section on 'Transaction Subtype from the Non-Service process'.

### Source Info Region

This region is used to define the specific actions to take for the instance being transacted. In the case of the sales order line, it can the part being sold on the sales order line.

Reference Required: Specifies whether an Install Base product number or reference number is mandated for this transaction type. In the case of a return of a non-serialized item, this Install Base product number is always required for the Install Base interface to know which instance to update. If the part is a serialized item, then this product number is not mandated because the interface program can pick up the serial number from the receipt transaction.

Change Owner: Indicates whether a change of ownership is to take place for this transaction type. If checked, then a change of ownership is to take place.

Change Owner To: Selects the ownership change to be Internal or External. For example, when returning an item for repair, the ownership need not be changed. For a sales order of a shipped item, the ownership can be changed to External.

Status: Defines the status to be updated for this instance. For example, when an instance is returned for repair, its status is changed to Returned for Repair.

Return Reqd: Requires a return date to be entered on the Installation detail for this transaction. Not mandatory.

Revision Reqd: Requires a revision to be entered on the Installation detail for a revision controlled instance. Not mandatory.

### Non Source Info Region

This region is to define the specific actions to make for the instance being related to the instance being transacted.

If the non-source installation detail uses the transaction subtype, then the action to be taken for the non-source instance comes from this region. For example, in order to use this subtype for a to-be-replaced instance in the non-source installation detail, Reference Reqd must be selected, and a status specified.

Reference Reqd: Specifies whether an Install Base product number or reference number is mandated for this transaction type.

Change Owner: Indicates whether a change of ownership is to occur for this transaction type. If checked, then change of ownership is to occur.

Change Owner To: Selects the ownership change to be Internal or External.

Status: Defines the status to be updated for this instance. For example, the status of a replaced instance can be `Replaced`.

Return Required: Requires a return date to be input on the transaction detail for this transaction.

#### Parent Info Region

This region is for future use.

#### Source Transaction Types Region

This region is to define the source application from which the transaction being defined comes.

This is a LOV of transaction types defined first in the Source Transaction Type setup. For example, the Sell transaction subtype comes from the Order Management application OM_SHIPMENT. Return for Credit comes from the Order Management application RMA_RECEIPT type.

Other examples of application sources are Field Service and Order Capture.

The In Out field is not being used for this release.

Default: Indicates whether this transaction subtype is to be used as the default subtype for that source transaction type and application being defined. For example, Sell is the default subtype for OM_SHIPMENT/ Order Management Ship/Fulfill sales order lines. Return for Repair is the default subtype for the RMA_RECEIPT/ Order Management Return line.

Update IB: Indicates whether this subtype/Source transaction type combination is used to update Install Base or not. For example, some subtypes set up for the Field Service application updates Install Base only from Field Service.

### 2.5.19 Set Up the Transaction Subtypes LOV from non-Service Processes

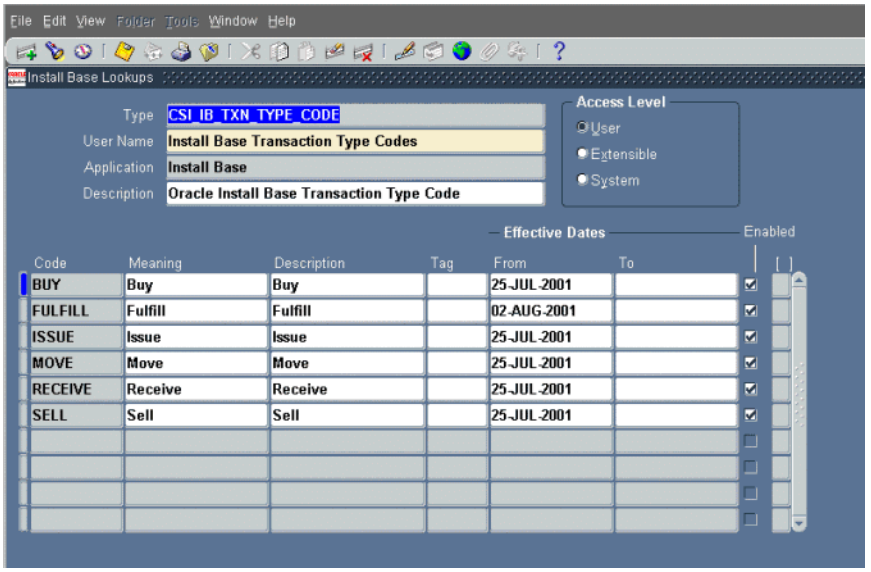
Type: CSI Lookup

Lookup Type: CSI_IB_TXN_TYPE_CODE

If the Service Type checkbox of the Source Transactions Subtypes window is not selected, then the LOV comes from the Install Base Transaction Type Codes setup.

This setup is found in the Install Base Administrator /Lookup/ CSI_IB_TXN_ TYPE_CODE table. Six seeded values are used in the transaction subtype setup, and more can be user-defined.

***Figure 2–20 Subtypes LOV from Non-Service Processes***




## 2.5.20 Verify Transaction Status Codes

Type: CSI Lookup

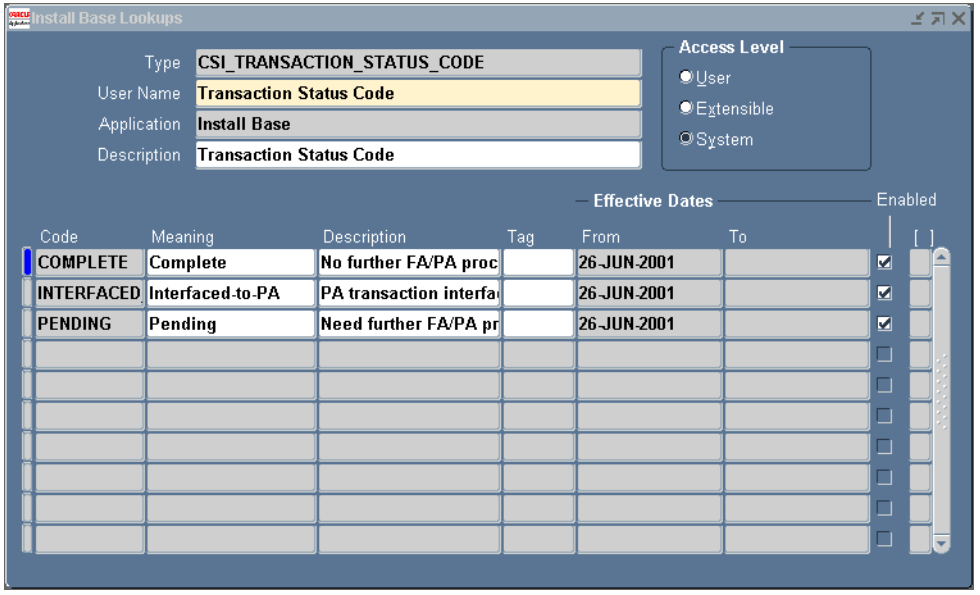
Lookup Type: CSI_TRANSACTION_STATUS_CODE

Access Level: System

Values are seeded for this code.

These are the status codes used for integration transactions

*Figure 2–21 Lookups for Transaction Status Codes*




## 2.5.21 Verify Transaction Error Source Types

Type: CSI Lookup

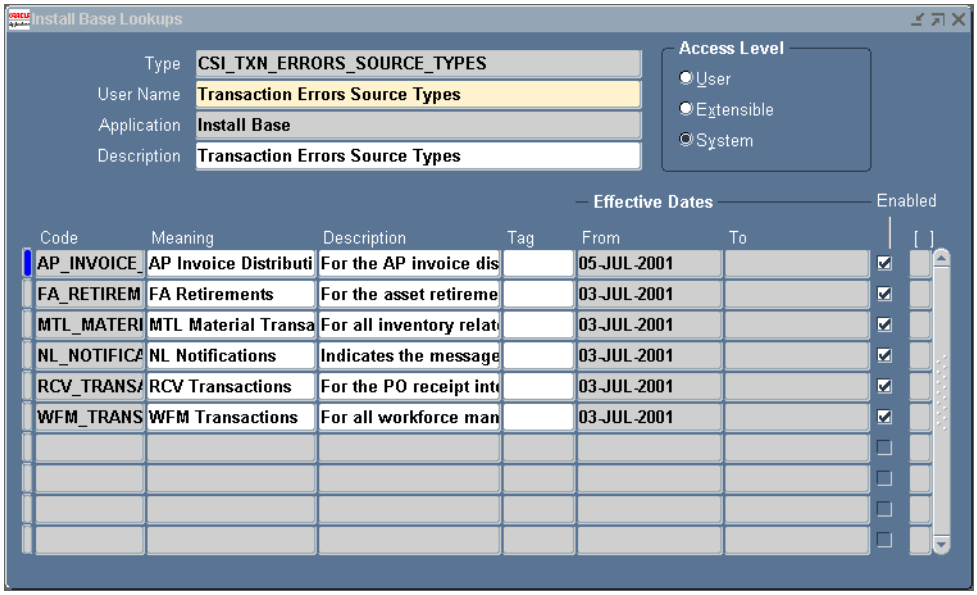
Lookup Type: CSI_TXN_ERRORS_SOURCE_TYPES

Access Level: System

Values are seeded for this code.

When an integration transaction is processed with an error, it is posted to the error table with one of the these error source types, which indicate where an error comes from.

*Figure 2–22 Lookups for Transaction Error Source Types*




## 2.5.22 Create Business Users

Install Base supports 38 different permissions with specific access and update privileges. See Table 2–13 for supported permissions.

A role is a combination of permissions. Install Base ships with two pre-defined roles: CSI_END_USER for business users and CSI_NORNAL_USER for internal agent users.

*Table 2–13 Permissions Supported by Install Base*

| Name | Description | Agent | Customer |
|---|---|---|---|
| CSI_ACCT_ACCESS_ONLY | Restricts the users access to Install Base products based on an Account | N | Y |
| CSI_ADDI_ATTR_UPDATE | Update permission for the CSI Additional Attributes page. | Y | Y |
| CSI_ADDI_ATTR_VIEW | View permission for the CSI Additional Attributes page. | Y | |

***Table 2–13 Permissions Supported by Install Base***

| Name | Description | Agent | Customer |
|---|---|---|---|
| CSI_ALL_ACCT_ ACCESS | Allows access to Install Base Products across accounts and parties. | Y | N |
| CSI_ASSET_UPDATE | Update permission for the Asset page | Y | N |
| CSI_ASSET_VIEW | View permission for the Asset page | Y | N |
| CSI_CONTACT_ DETAIL_UPDATE | Update permission for the Contact Detail page | Y | Y |
| CSI_CONTACT_ DETAIL_VIEW | View permission for the Contact Detail page | Y | Y |
| CSI_CONTRACT_ UPDATE | Update permission for the Contract page | Y | Y |
| CSI_CONTRACT_ VIEW | View permission for the Contract page | Y | Y |
| CSI_COUNTER_ UPDATE | Update permission for the Counter page | Y | Y |
| CSI_COUNTER_VIEW | View permission for the Counter page | Y | Y |
| CSI_CREATE_INST_ UPDATE | Update permission for the Create Instance page | Y | Y |
| CSI_CREATE_INST_ VIEW | View permission for the Create Instance page | Y | Y |
| CSI_CREATE_SYS_ UPDATE | Update permission for the CSI Create System page | Y | N |
| CSI_CREATE_SYS_ VIEW | View permission for the CSI Create System page | Y | N |
| CSI_CUSTOMER_ VIEW | This permission should be assigned to any user that is a customer | N | Y |
| CSI_DOWNLOAD | Permission to download product search results. | Y | Y |
| CSI_EXPIRE_ INSTANCE | Users with this permission can change the instance status to any terminable status. The user also needs to have the CSI_INST_STATUS_UPDATE permission. | Y | Y |
| CSI_GENERAL_ ATTRIB_CUST_ONLY | Makes certain Customer product attributes read only | N | Y |
| CSI_INST_CONFIG_ UPDATE | Update permission for the Instant Config page | Y | Y |

***Table 2–13 Permissions Supported by Install Base***

| Name | Description | Agent | Customer |
|---|---|---|---|
| CSI_INST_CONFIG_ VIEW | View permission for the Instant Config page | Y | Y |
| CSI_INST_GENERAL_ UPDATE | Update permission for the Instant General page | Y | Y |
| CSI_INST_GENERAL_ VIEW | View permission for the Instant General page | Y | Y |
| CSI_INST_NOTES_ UPDATE | Permission to update the Oracle Install Base instance notes. | Y | Y |
| CSI_INST_NOTES_ VIEW | Permission to view the Oracle Install Base instance notes. | Y | Y |
| CSI_INST_ QUANTITY_UPDATE | Users with this permission are allowed to update instance quantity | Y | Y |
| CSI_INST_STATUS_ UPDATE | Users with this permission can update the instance status | Y | Y |
| CSI_LATEST_ TRANSACTION_ UPDATE | Update permission for the Latest Transaction page | Y | Y |
| CSI_LATEST_ TRANSACTION_ VIEW | View permission for the Latest Transaction page | Y | Y |
| CSI_MERCHANT_ VIEW | this permission should be assigned to any user that is an agent of a merchant | Y | N |
| CSI_ OPERATINGUNIT_ UPDATE | Update permission for the Operating Unit page. | Y | N |
| CSI_ OPERATINGUNIT_ VIEW | View permission for the Operating Unit page. | Y | N |
| CSI_ ORGANIZATION_ VIEW | Permission to view organizations | Y | N |
| CSI_PARTY_ ACCOUNT_UPDATE | Update permission for the Party Account page | Y | N |
| CSI_PARTY_ ACCOUNT_VIEW | View permission for the Party Account page | Y | N |

***Table 2–13 Permissions Supported by Install Base***

| Name | Description | Agent | Customer |
|---|---|---|---|
| CSI_PARTY_ CONTACT_UPDATE | Update permission for the Party Contact page | Y | Y |
| CSI_PARTY_ CONTACT_VIEW | View permission for the Party Contact page | Y | Y |
| CSI_PARTY_ SUMMARY_UPDATE | Update permission for the Party Summary page | Y | N |
| CSI_PARTY_ SUMMARY_VIEW | View permission for the Party Summary page | Y | N |
| CSI_PARTY_UPDATE | Update permission for the Party page | Y | N |
| CSI_PARTY_VIEW | View permission for the Party page | Y | N |
| CSI_PERZ_EDIT_ UPDATE | Update permission for the Personalized Edit page | Y | Y |
| CSI_PERZ_EDIT_ VIEW | View permission for the Personalized Edit page | Y | Y |
| CSI_PRICING_ UPDATE | Update permission for the Pricing page | Y | Y |
| CSI_PRICING_VIEW | View permission for the Pricing page | Y | Y |
| CSI_PROPERTY_ READ | Read the CSI Properties | Y | Y |
| CSI_PROPERTY_ UPDATE | Update the CSI Properties | N | N |
| CSI_REPAIR_ORDER_ UPDATE | Update permission for the Repair Order page | Y | Y |
| CSI_REPAIR_ORDER_ VIEW | View permission for the Repair Order page | Y | Y |
| CSI_SEARCH_ASSET_ RES_UPDATE | Update permission for the Search Asset Result page | Y | N |
| CSI_SEARCH_ASSET_ RES_VIEW | View permission for the Search Asset Result page | Y | N |
| CSI_SEARCH_ASSET_ UPDATE | Update permission for the Search Asset page | Y | N |
| CSI_SEARCH_ASSET_ VIEW | View permission for the Search Asset page | Y | N |

***Table 2–13 Permissions Supported by Install Base***

| Name | Description | Agent | Customer |
|---|---|---|---|
| CSI_SEARCH_ PRODUCT_UPDATE | Update permission for the Search Product page | Y | Y |
| CSI_SEARCH_ PRODUCT_VIEW | View permission for the Search Product page | Y | Y |
| CSI_SEARCH_SYS_ UPDATE | Updating systems search results. | Y | N |
| CSI_SEARCH_SYS_ VIEW | Viewing the systems search page. | Y | N |
| CSI_SEARCH_ TRANSACTION_ UPDATE | Update permission for the Search Transaction page | Y | N |
| CSI_SEARCH_ TRANSACTION_ VIEW | View permission for the Search Transaction page | Y | N |
| CSI_SERVICE_ REQUEST_UPDATE | Update permission for the Service Request page | Y | Y |
| CSI_SERVICE_ REQUEST_VIEW | View permission for the Service Request page | Y | Y |
| CSI_SHOW_ALL_ CONTACTS | Allows Install Base User to view all types of contacts | Y | N |
| CSI_SHOW_ALL_ LOCATIONS | Allows the Install Base user to view all types of locations | Y | N |
| CSI_SHOW_ALL_ PARTIES | Allows the user to View all types of parties including Employees CSI | Y | N |
| CSI_SHOW_EXT_ CONTACTS | Restricts Install Base User to view only the external contacts | N | Y |
| CSI_SHOW_EXT_ LOCATIONS | Restricts the Install Base user to view only external locations | N | Y |
| CSI_SHOW_EXT_ PARTIES | Restricts the user to View only the External parties | N | Y |
| CSI_SHOW_INST_ CUSTOMER_MENU | Permission to have the Install Base Customer facing instance details Menu | N | Y |
| CSI_SHOW_INST_ MENU | Permission to have the Install Base Agent facing instance details Menu | Y | N |

*Table 2–13 Permissions Supported by Install Base*

| Name | Description | Agent | Customer |
|---|---|---|---|
| CSI_SPLIT_ QUANTITY_UPDATE | Update permission for the Split Quantity page | Y | Y |
| CSI_SPLIT_ QUANTITY_VIEW | View permission for the Split Quantity page | Y | Y |
| CSI_SYS_CFG_VIEW | Viewing Systems configurations. | Y | Y |
| CSI_SYS_DTL_ UPDATE | Update permission for the CSI System Detail page | Y | Y |
| CSI_SYS_DTL_VIEW | View permission for the CSI System Detail page | Y | Y |
| CSI_TABLE_PERZ_ UPDATE | Update permission for the Table Personalized page | Y | N |
| CSI_TABLE_PERZ_ VIEW | View permission for the Table Personalized page | Y | N |
| CSI_TRANSACTION_ DETAIL_UPDATE | Update permission for the Transaction Detail page | Y | Y |
| CSI_TRANSACTION_ DETAIL_VIEW | View permission for the Transaction Detail page | Y | Y |
| CSI_TRANSACTION_ INSTANCE_UPDATE | Update permission for the Transaction Instance page | Y | Y |
| CSI_TRANSACTION_ INSTANCE_VIEW | View permission for the Transaction Instance page | Y | Y |
| CSI_TRANSFER_ OWNER_UPDATE | Update permission for the Transfer Owner page | Y | N |
| CSI_TRANSFER_ OWNER_VIEW | View permission for the Transfer Owner page | Y | N |

Use this procedure to create a business user and assign the pre-defined CSI_END_ USER role and the responsibility of Oracle Install Base customer.

### Steps

1. Login to the Oracle eBusiness Suite login (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 Roles.
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. 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 Oracle eBusiness Suite login (jtflogin) with the user name and password, and everything should be set.

    The accounts that you assigned in step 9 should be what will show up as the list of accounts associated with this user in the customer UI. 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.

## 2.5.23 Create Agent Users

Use this procedure to create an agent user for an internal user with the CSI_NORMAL_USER role and the responsibility of Oracle Install Base user.3.

### Steps

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. Using the single arrow button, move CSI_NORMAL_USER from the list box to the right hand side.
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 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.

In addition, you can define customized roles to have specific permissions to fit specific needs. Use this procedure to create a role.

### Steps

1. Login as System Administrator on the HTML login.
2. Click the Settings tab.
3. Click Create.
4. Provide a role name and description. This creates a role without any permission.
5. Query the role and click the role. The Role Mapping page appears, where 83 predefined permissions are provided.
6. Using the transfer buttons, select the desired permissions. After you finish, click Update.

   Alternatively, you can copy the permissions from either CSI_NORMAL_USER or CSI_END_USER and take out the unwanted permissions.
7. After you finish Role definition, restart the Apache server to see the updates. Now you can use this role to create new users.
8. Assign the responsibility of Oracle Install Base Customer for customer users. Assign Oracle Install Base User for internal agent users.

## 2.5.24 Schedule the Expire End Dated Instances Program

This program goes through the end dates set up for instances to be expired. If the end date is past due, then the instances are set to expire. Schedule this program to run at least once a day. To schedule the program:

### Steps

1. Login as Oracle Installed Base Admin in the forms mode.

   The Navigator window appears.
2. Chose Others > Requests.

   The Submit a New Request window appears.
3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Expire End Dated Instances.
5. Click OK.
6. In the At these Times region, click Schedule.

   The Schedule window appears.
7. Select the desired running schedule.
8. Click OK.

   The Installed Base Requests window appears.
9. Click Submit.

## 2.5.25 Schedule the Initiate Mass Edit Program

This program polls the submitted mass edit sessions and calls the Process Mass Edit program to process eligible sessions. In order to process mass edit transactions, run the Initiate Mass Edit concurrent program or schedule it to run at a regular intervals. Oracle recommends that you schedule it to run at least once a day. To schedule the program:

### Steps

1. Login as Oracle Installed Base Admin in the forms mode.

   The Navigator window appears.
2. Chose Others > Requests.

   The Submit a New Request window appears.
3. Select Single Request, and click OK.

   The Installed Base Requests window appears.
4. From the Name LOV, select Initiate Mass Edit.
5. Click OK.
6. In the At these Times region, click Schedule.

   The Schedule window appears.
7. Select the desired running schedule.
8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

## 2.5.26 Schedule the Process Mass Edit Program

This is the program that is called automatically to process the mass edit sessions. Schedule it to run at a regular interval to pick up mass edit sessions due to be processed. To schedule the program:

### Steps

1. Login as Oracle Installed Base Admin in the forms mode.

   The Navigator window appears.

2. Chose Others > Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Process Mass Edit Transaction.

5. Click OK.

6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.

8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

## 2.5.27 Schedule the Process Old Order Lines-Fulfillable Only Program

This program processes the old fulfillable order lines migrated from previous versions of Install Base. Run it once or twice a day for the month after you migrate. To schedule the program:

### Steps

1. Login as Oracle Installed Base Admin in the forms mode.

   The Navigator window appears.

2. Chose Others > Requests.

The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Process Old Order Lines-Fulfillable Only.
5. Click OK.
6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.
8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

## 2.5.28 Schedule the Resubmit Interface Process

This program processes the transactions in the Error processing table. It can be set up to process selected lines or all lines in the table. This program can be called to run by user request or can set up to run at a regular interval. To schedule the program:

### Steps

1. Login as Oracle Installed Base Admin in the forms mode.

   The Navigator window appears.

2. Chose Others > Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Resubmit Interface Process.
5. Click OK.
6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.

8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

## 2.5.29 Schedule the Resubmit Waiting Transactions Program

This program processes the transactions that are set as waiting status in the Install Base update process. The program can be scheduled to run at a regular interval. To schedule the program:

### Steps

1. Login as Oracle Installed Base Admin in the forms mode.

   The Navigator window appears.

2. Chose Others > Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Resubmit Waiting Transactions.

5. Click OK.

6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.

8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

## 2.5.30 Final Synchronize On-Hand Balance between Inventory and Install Base

To maintain life-cycle tracking for all items that are to be tracked in Install Base, it maintains a mirror image of what is in Inventory. For new implementations of Install Base, all on-hand quantities of the Install Base trackable items were issued out of Inventory in Step 1 of the checklist. Now you must receive them back into Inventory. You must ensure that the Service Fulfillment Manager queue is up and

running before attempting this step. Oracle suggests that you use the miscellaneous receipt transaction in Inventory to do this step.

Refer to the steps in *Oracle Service Fulfillment Manager Concepts and Procedures* to start and make sure that the Service Fulfillment Manager queue is up and running.

# 3

# Implementation and Setup for Upgrade Users

This chapter provides implementation and setup information for users who have an earlier version of Oracle Install Base and are upgrading to this version. Because you are an upgrade user, the application automatically updates much of your current setup. Therefore you are required to consider only a subset of the setup steps required for a new user.

This chapter covers the following topics:



## 3.1 Product Dependencies and Requirements

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

- Oracle Inventory
- Oracle Enterprise Install Base
- Oracle Service Fulfillment Manager
- Oracle Order Management
- Oracle Purchasing (Optional)
- Oracle Accounts Receivable
- Oracle Work in Process (Optional)
- Oracle Bills of Material

## 3.2 Setup Checklist for Upgrade Users

This following table provides a checklist of setup steps for upgrade users of Oracle Install Base. The entries for section reference in the table direct you to Chapter 2 for detailed step descriptions.

***Table 3–1 Setup Checklist for Upgrade Users of Oracle Install Base***

| Step Number | Title | Required or Optional | Seeded? | Extensible? | Section Reference |
|---|---|---|---|---|---|
| **1.** | Set Up Inventory Serial Control at the Master Level | Required | NA | NA | Section 2.3.2 |
| **2.** | Set Up Vendors | Optional | N | N | Section 2.3.5 |
| **3.** | Set Up Employees | Optional | N | N | Section 2.3.6 |
| **4.** | Confirm the Setup of Oracle Service Fulfillment Manager Event Queue | Required | N | N | Section 2.3.9 |
| **5.** | Set Up the Action Menu in Order Management | Required | N | N | Section 2.3.10 |
| **6.** | Set Up the Order Management Workflow | Required | N | N | Section 2.3.11 |
| **7.** | Run the License Manager Program | Required | N | N | Section 2.4.1 |
| **8.** | Verify the Setup of Four Profile Options for Enterprise Install Base | Required | N | N | Section 2.4.2 |
| **9.** | Verify Location IDs in HZ_ LOCATIONS | Required | Y | N | Section 2.4.3 |
| **10.** | Verify Codes for Asset Update Statuses | Optional | Y | N | Section 2.4.4 |
| **11.** | Set Up Codes for Party-Account and Party-Contact Relationship Types | Required | Y | Y | Section 2.5.2 |
| **12.** | Verify Codes for Instance Relationship Types | Required | Y | N | Section 2.5.3 |

*Table 3–1 Setup Checklist for Upgrade Users of Oracle Install Base*

| Step Number | Title | Required or Optional | Seeded? | Extensible? | Section Reference |
|---|---|---|---|---|---|
| **13.** | Verify Extended Attribute-Level Codes | Required | Y | N | Section 2.5.4 |
| **14.** | Set Up Extended Attribute Pools | Optional | N | N | Section 2.5.5 |
| **15.** | Set Up Extended Attribute Classifications | Optional | N | N | Section 2.5.6 |
| **16.** | Set Up Extended Attributes | Optional | N | Y | Section 2.5.7 |
| **17.** | Verify Accounting Classification Codes | Required | Y | N | Section 2.5.8 |
| **18.** | Verify Codes for Instance Location Sources | Required | Y | N | Section 2.5.10 |
| **19.** | Verify Party Sources | Required | Y | N | Section 2.5.11 |
| **20.** | Set Up Codes for Instance-Organization Unit Relationship Types | Required | Y | Y | Section 2.5.12 |
| **21.** | Set Up the Transaction Subtypes LOV from non-Service Processes | Required | Y | N | Section 2.5.19 |
| **22.** | Verify Transaction Error Source Types | Required | Y | N | Section 2.5.21 |
| **23.** | Create Business Users | Required | N | N | Section 2.5.22 |
| **24.** | Create Agent Users | Required | N | N | Section 2.5.23 |
| **25.** | Schedule the Expire End Dated Instances Program | Required | N | N | Section 2.5.24 |
| **26.** | Schedule the Initiate Mass Edit Program | Required | N | N | Section 2.5.25 |
| **27.** | Schedule the Process Mass Edit Program | Required | N | N | Section 2.5.26 |

***Table 3–1 Setup Checklist for Upgrade Users of Oracle Install Base***

| Step Number | Title | Required or Optional | Seeded? | Extensible? | Section Reference |
|---|---|---|---|---|---|
| **28.** | Schedule the Process Old Order Lines-Fulfillable Only Program | Required | N | N | Section 2.5.27 |
| **29.** | Schedule the Resubmit Interface Process | Required | N | N | Section 2.5.28 |
| **30.** | Schedule the Resubmit Waiting Transactions Program | Required | N | N | Section 2.5.29 |

# 4

# Oracle Install Base System Profile Options and Debug Information

## 4.1 Oracle Install Base System Profile Options

Table 4–1 describes the profile options for Oracle Install Base. These profile options are to be set at the site level.

***Table 4–1 Profile Options for Oracle Install Base***

| Profile Option Name | Comments |
|---|---|
| CSI Allow Install Parameter Update | Set to Y after migration to allow a one-time update to Install Parameters. Then it is set to N. |
| CSI Auto-Generate System Name | Auto-generate System Number at time of system creation (Y or N). |
| CSI Auto-split Instances During Instantiation | Auto split instances with multiple quantity to 1 per instance at time of instance creation (Y or N). |
| CSI BOM Explosion Level | Number of BOM levels to explode for creation of component-of configuration from BOM setup (1, 2, 3.). Note that BOM explosion stops at any level where child is at quantity > 1. |
| CSI Cascade System Termination | Cascade system termination to instances (Y or N). |
| CSI Contracts Enabled | Enable Install Base integration with Service Contracts (Y or N). |
| CSI Counters Enabled | Enable Install Base Integration with Counters (Y or N). |
| CSI Debug Level | For Debug, set at 9 or 10 for Debug to start. |
| CSI Default Instance Status | Default Instance Status at time of instance creation. Pick one status from the LOV. |

***Table 4–1 Profile Options for Oracle Install Base***

| Profile Option Name | Comments |
|---|---|
| CSI Default Version Label | Default version label at time of instance creation. Pick one from the LOV. |
| CSI Display HTML UI | Option to use Install Base HTML for display (Internal). Used by other CRM applications to use Install Base HTML UI (Y or N). |
| CSI Enable SQL Trace | For Debug (Y or N). Set to Y to start Debug. |
| CSI Explode BOM | Enable BOM explosion for top assembly with Install Base trackable components at time of shipment/fulfillment (Y or N). |
| CSI Forms to SSWA Default Responsibility | Default user for applications to launch HTML from forms. Default Installed Base User or from the LOV. |
| CSI Instance Termination Status | Default Termination Status. Pick one from the LOV. |
| CSI Log file Name | The name of the log file for Debug. |
| CSI Log File Path | For Debug ('utl-file-dir' parameter in init.ora). |
| CSI OE Line Processing Delay | Delay between OE line processing. Time between order line processing to allow for Install Base update completion to avoid record locking. Recommended delay: 60 seconds. |
| CSI Propagate System Changes | Propagate system changes to instances (Y or N). |
| CSI Propagate Systems Changes - Window Display | Condition of propagating system changes to products when Propagate System Changes is set to 'Y':<br>■ Always Display: Change only when the system info matches the product information.<br>■ Always Change: Do not display and always change.<br>■ Never Change: Do not display and do not change: |
| CSI Stop At Debug Errors | Set to Y to start debug (Y or N). |
| CSI System name Update Allowed | System name update allowed after system name creation (Y or N). |
| SERVICE Master Inventory Validation Org | INV master Validation Org used at time of online instance creation. Pick from the LOV. |

## 4.2 Setting the Debug Option

Oracle Install Base provides an option to write 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:

### Steps

1. Change the value of profile option CSI_DEBUG_LEVEL to either 9 or 10.
2. Specify the value of the profile option CSI_LOGFILE_PATH to be the path of the directory on the 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.
4. Use these settings as required:
   - CSI Stop At Debug Errors: Set to Y to start Debug.
   - CSI Enable SQL Trace: Set to Y to start Trace.