

Oracle® Install Base

Concepts and Procedures

Release 11*i*

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This guide covers Oracle Install Base and two associated applications, Oracle® Install Base Intelligence and Counters.

ORACLE®

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Oracle Install Base Concepts and Procedures, Release 11i

Part No. B10164-01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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Preface

Audience for This Guide

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

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

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

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

- The Oracle Applications graphical user interface.

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

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

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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 understand and use Oracle Install Base and two associated applications, Oracle Install Base Intelligence and Counters.

- Chapter 1 provides overviews of the application, its features, functions, and integration points with other applications.
- Chapter 2 provides information about starting the application, accessing its initial pages, and using features that appear throughout it.
- Chapter 3 provides procedures for locating and building products and associating them with assets, parties, pricing data, counters, contracts, transactions, service requests, and repair orders.
- Chapter 4 provides procedures for defining transaction search criteria and viewing the results.
- Chapter 5 provides procedures to view and define systems, which are constructs that owners of products can define to group their products.
- Chapter 6 describes Oracle Install Base Intelligence, with which you can view reports based on historical and current data.
- Chapter 7 describes the window used to specify the transaction type used for updating a source instance and non-source instance. A new system can also be created for the instance from this window.

- Chapter 8 describes the window where you can reprocess transactions that failed to update Install Base from certain ERP sources.
- Chapter 9 describes the window where you can schedule several changes to be made to a group of instances.
- Chapter 10 describes the Counters application.

Other Information Sources

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

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

Online Documentation

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

Related Documentation

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

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

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

Documents Related to All Products

Oracle Applications User's Guide

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

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

Documents Related to This Product

Oracle Install Base Implementation Guide

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

Oracle Enterprise Install Base Concepts and Procedures

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

Oracle Service Concepts and Procedures

This guide provides information about supporting applications for Oracle Service and Contracts applications.

Oracle Inventory User's Guide

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

Oracle Order Management User's Guide

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

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications,

the Oracle8 technology stack, and the Oracle8i 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 11i. 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 11i. You cannot upgrade to Release 11i 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 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

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

Multiple Organizations in Oracle Applications

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

Oracle Workflow Guide

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your

existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

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

Oracle Order Management Suite APIs and Open Interfaces Manual

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

Oracle Applications Message Reference Manual

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

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Install Base working for you. This team includes your Technical Representative, Account Manager, and

Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink 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 OracleMetaLink, 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 OracleMetaLink 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.

Overview of Oracle Install Base

1.1 Definition of Oracle Install Base

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

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

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

1.2 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-dated, mass load capability
- Definable extended attributes

1.2.2 Instance Maintenance

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

1.2.3 Multiple Party/Account Relationships

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

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

1.2.6 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 Life Cycle Tracking in Install Base

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

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

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

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

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

1.2.8 Sales Order Shipment, Fulfillment, and RMA Receipt Interface

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

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

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

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

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

2. Fulfilled Order Lines (non-shippable items)

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

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

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

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

1.2.10 Extended Attributes

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

1.2.11 Inventory Interface

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 of 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 an item is issued to a WIP job, then the location of the item reflects the WIP job number. If it is transferred with an internal order, then the location reflects the internal sales order.

If it is issued to an asset, then it reflects the asset number. If it is issued to a project/task, then the location of the instance shows the project and task number. Refer to Oracle Enterprise Install Base documentation for more details.

1.2.12 WIP Interface

The creation of a serialized top assembly instance with component configuration is supported. However, creation of a non-serialized top assembly instance with component configuration is not.

At the time of WIP assembly complete inventory receipt, the interface generates an inventory receipt in the Inventory module. The Install Base interface creates an instance for the serialized top assembly and the component-of configuration of any Install Base trackable items issued to the WIP job. In this case, the serial numbers of the components are known at the time of creation. At the time of sales order shipment, the ownership and location are changed to that of the customer, depending on the transaction used.

1.3 Integration Points and Dependencies for Oracle Install Base

For more details, refer to "Integration Points and Dependencies for Oracle Install Base" in the *Oracle Install Base Implementation Guide*.

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 Services Online (ASO)
- Access for view and reference by the rest of CRM applications including Contracts and Service Request
- Trading Community Architecture (TCA) party for party and relationship

1.3.2 ERP Integration

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

- Inventory Receive and Transactions
- Purchase Order Receive, Order Management RMA Receive

- Order Management Shipping and Fulfillment
- Fixed Assets
- Projects
- Work in Process

Basics of Oracle Install Base

2.1 Accessing Oracle Install Base in HTML

You access Oracle Install Base in the main HTML mode as follows:

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

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

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

2.2 The Products Tabbed Page

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

Products

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

Transactions

Here you can search for transactions and examine their details.

Systems

Here you can view and maintain systems.

2.3 Finding a Product with Quick Find

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

Prerequisites

None

Steps

1. Click the Products tab.

The Search Products page appears.

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

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

3. In the field immediately to the right, enter a value for the type of identifier that you selected. Except for a sales order number, you can use the wildcard % in the search string.

4. Click Go.

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

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

2.4 Using the Go Button to Display a List of Values

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

2.5 Accessing Oracle Install Base in Forms

Some user features of Oracle Install Base are in the forms mode. Forms windows require a different access procedure than do the HTML parts of the application. You must use the URL, user name, and password provided by your local system administrator to log in to the forms mode of Oracle Applications. Then use the responsibility and navigation defined for the particular window.

Forms windows described in this guide include:

- Transaction Details
- Transaction Errors
- Mass Edit/Future Dated Transaction

Using the Products Tabbed Page

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

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

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

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

For each product in Install Base, a history of transactions is being tracked and stored. Given a particular time frame, these transactions and the state of the attributes during that time can be viewed.

3.1 The Search Products Page

The Search Products page has the following regions:

Quick Find

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

Search Products

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

Saved Searches

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

Search Results (untitled)

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

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

Remove button

Marks the entry as a candidate for changing the status of the product to Expired, with the end date of today, when you click Update.

Description link

Displays the General Attributes region of a Product Details page.

View Configuration icon

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

View Detail icon

Displays the most frequently used attributes of the instance on one page.

Copy button

Displays the Copy Product page. There you can use the copy of the product definition to define another product. The Copy Product page is very similar to the Create Product page reached with the Create button. The main difference is that the Copy Product page already has supplied some values. The Copy button is available only for products that are at a customer location.

Update button

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

Create button

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

Download button

Downloads and saves the search summary results to an Excel file.

3.2 The Product Details Pages

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

General

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

Additional Attributes

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

Assets

View and define associated asset information such as asset number, date placed in service, and employee. Oracle Enterprise Install Base uses such information in the tracking of fixed assets.

Party Relationships

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

Associated links have the following uses:

- Owner: Transfer products.
- Party: Add or maintain party relationships
- Account: Define and maintain accounts and account types for a party
- Contact: Define the contact type and names of a party
- Summary: Display all the associated parties, and the accounts and contacts from each

Pricing

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

Counters

Review and update counter readings associated with the instance.

Contracts

View information such as the name, effective dates, and coverage description of service contracts associated with the instance. Each contact number can link to a page of contracts details.

Notes

Create and view notes associated with a product.

Transactions

View the most recent transactions for this product. Each transaction ID links to a page of transaction details.

Service Requests

View and create service requests associated with the product.

Repair Orders

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

History

Retrieve and view the history of a product based on a date range or a version label.

Operating Units

Display and maintain operating units associated with the product.

Configuration

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

3.3 Using Saved Searches

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

Prerequisites

None.

Steps

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

3.4 Defining Saved Search Criteria

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

- General Attributes
- Current Location
- Installed Location
- Party

- Contact
- Party Accounts
- Contracts
- Sales Order
- Assets
- Table Personalization (select and position the display columns in the search summary, and select the sort orders for the display)

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

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

Prerequisites

None

Steps

1. Click the Products tab.

The Search Products page appears.

2. Click Personalize.

The Advanced Product Search page appears.

3. In each selected category regions, enter data in the fields.

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

Click the calendar icon to help you enter dates.

Click Show Expired Instance to view products that have been expired. As a default, only active instances are displayed.

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

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

5. In the Sort Rows region, select from the LOV the fields to be used in the sort order.
6. Use the arrows in the right-hand column of the personalization table to arrange the display sequence of your selected columns. The column titles as arranged from top to bottom are displayed from left to right on the Search Products page.
7. As appropriate, click one of the following:
 - Search: Finds values that satisfy the current search criteria
 - Save As: Saves the current search criteria with a name that you enter
 - Save: Saves the search criteria under the most recently used name for search criteria
 - Save and Search: Saves the search criteria under the most recently used name for search criteria and then performs a search that uses those criteria.
 - Use as Summary Page Default: Use this search as a default each time you log on.

References

[The Search Products Page](#)

3.5 Creating Products

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

The item flag region will be populated with default item setup flags. The Merchant checkbox is selected automatically if an agent creates or changes the instance. Similarly, the Customer checkbox is selected automatically if a customer creates or changes the instance.

The Organization field defaults to the Service validation organization profile setup. It can be changed by selecting another organization from the LOV (GO button).

The inventory rules of the selected organization will be used to verify the item being created. The BOM from the organization will be used in the case of warranty creation.

Red asterisk fields are mandatory. An instance created online can belong to a party (external, such as a customer), an employee, or a vendor.

If an item is serialized controlled, then the serial number and a manufacturing flag field is displayed for input. If the manufacturing flag is selected, then the serial number uniqueness is verified in the ERP inventory organization as well as in Install Base. If it is not checked, then its uniqueness is checked only within Install Base. Version label and status default to the profile option setup if not populated. Accounting classification default to Customer Product if not populated.

If an owner is an external party, then an account is mandatory.

For current and installed-at location, after the type is selected, the appropriate location format will be displayed for input. For example, if Party site is selected, then several lines allowing input of address are displayed or selected from GO.

The owner party is the default in the Party field in the Location region, and the LOV of locations are those of the owner party and its related parties. Another party can be selected from LOV of the Party field to enable the selection of the locations for this party and its related parties.

Installation date defaults to sysdate, if not populated. This field can be populated with past, current, or future date. This date is tied to the warranty start date in Service contract if a warranty is associated with the item BOM.

Use the following procedure to create a product.

Prerequisites

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

Steps

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

The Create Product page appears.

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

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

Click the calendar icon to help you enter dates.

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

3. If your definition is complete, then Creation Completed is selected by default upon saving.

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

4. Click Submit.

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

Guidelines

After an instance is created with a product number, a Product Detail page appears for you to enter any additional information such as party and contact.

3.6 Copying Products

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

Copy functions are available only for instances that are customer products.

Use the following procedure to copy a product.

Prerequisites

None

Steps

1. Navigate (T) Products > (T) Products.
The Search Products page appears.
2. If an appropriate product list for copying a product is not already displayed, then generate such a list by performing a search as described in [The Search Products Page](#).

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

The Copy Product page appears.

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

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

Click the calendar icon to help you enter dates.

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

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

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

3.7 Working with General Attributes

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

An instance is available for modification only when it is a customer product. An instance in inventory, in WIP, or in a project cannot be updated. All changes for this kind of instance should come from ERP integrations.

To expire an instance, the end date field must be populated. If a status is not entered, then the default termination status is used.

The current and installed location can be changed on this page.

The owner party is the default in the Party field in the Location region, and the LOV of locations will be those of the owner party and its related parties. Another party can be selected from the LOV of the Party field to enable the selection of the locations for this party and its related parties.

Whether all parties or only related parties will be displayed in the LOV of the Party field is controlled by the option All Parties in the Install Base Parameter setup.

A transfer of ownership is done from the Owner link.

Descriptive flex fields have to be set up first on the ERP DFF setup before they can be used for update on this page.

If you want to take a snapshot of all the attributes for an instance for a certain occasion, such as *As Returned-03-12-2002*, enter such a version label in the version label field, and the system will store this state of the attributes in history with this label and a time stamp. Then you can retrieve this history for review by using the version label. Version Label is a free-form field, with the exception of the one being used at instance creation if no label is entered into the field. For this, the default version label specified in the profile option is used.

A split icon is displayed for customer product instances with quantity greater than 1, strictly for non-serialized items. For more information, refer to "Splitting Quantities."

Prerequisites

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

Steps

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

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

Click the calendar icon to help you enter dates.

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

As necessary, click **Restore** to return the settings to those of the most recently saved state of the product, and re-enter your values.

3. If your definition is complete, then optionally select **Creation Completed**.
4. Click **Save**.
5. If you selected the **Split** item flag, then a page appears in which you can define how you want to split the quantity for your product.

Guidelines

If you want to take a snapshot of all the attributes for an instance for a certain occasion, such as *As Returned-03-12-2002*, enter such a version label in the version label field, and the system will store this state of the attributes in history with this

label and a time stamp. Then you can retrieve this history for review by using the version label. Version Label is a free-form field, except at the time of instance creation. Then the default version label specified in the profile option is used.

3.8 Working with Additional Attributes

In the Additional Attributes page you can supply a value for a list of additional attributes, which are user definable in the Install Base Administration responsibility.

Prerequisites

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

The additional attributes must have been set up in Install Base Administration. Refer to the *Oracle Install Base Implementation Guide* for the setup of additional attributes.

Additional attributes can be set up for an item, an item category, an instance, or for a global install base. After definition in the setup, the attributes show up on the Additional Attributes link for user input.

Steps

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

3.9 Working with Assets

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

Prerequisites

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

Assets must have been associated with the instance. For details, refer to *Oracle Enterprise Install Base Concepts And Procedures* and the *Oracle Enterprise Install Base Implementation Guide*.

Steps

1. In the side navigation menu, select Assets.
2. Click Add Asset. The Search Assets page appears.
3. In each region, enter data in the fields.
As necessary, use generic entries and the associated Go button to populate fields with specific values.
Click the calendar icon to help you enter dates.
As necessary, click Clear to clear out your test entries, and re-enter values.
4. Click Search. The Asset Search Results page appears.
5. If necessary to refine your search, select an item and click Refine Search Criteria. You are returned to the Search Assets page. Go to step 3.
6. Fill blank fields of candidate assets, and use Go buttons as necessary.
7. Select an asset that you want to add.
8. Click Add to Product.
The asset is added to your product.

3.10 Working with Parties

In the Parties pages you can view and define instance parties and their associated accounts and contacts. Links for Owner, Party, Accounts, Contacts, and Summary are under the Party Relationships heading.

More than just the owner relationship can be defined for an instance, although the owner relationship is mandatory. You can define multiple relationship types in the setup and use them in specifying relationships with different parties. For example, relationship types such as Distributor, Meter Reader, and End User can be defined for party, account, and contact relationship types. For each party defined in the party relationship, multiple accounts/account types and contact/contact types can be defined.

A party can be of type Party, Employee, Vendor, Group or Team. Group, Team, Employee and Vendor party types cannot have Account or Contacts associated with them. Only the party type of Party can be associated with accounts and contacts.

Use this procedure to work with parties.

Prerequisites

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

The party types, accounts types, and the contacts types to be used must have been set up in Instance party Account Relationship Types. This is done with the Install Base Administration responsibility. Refer to the *Oracle Install Base Implementation Guide* for details of setup.

Steps

1. In the side navigation menu, select Parties.
The Parties page appears. Here you can view and define parties.
2. To mark a party for removal, select Remove for the party name.
3. Use the lists of values and the Go buttons as necessary to define party type, party name, and relationship type.
4. Enter start and end dates.
If no start date is entered, then it defaults to the current date. If you want this party relationship to end on a particular date, then enter it as the end date. It can be the current date or a future date. If you do not want to enter an end date, then you can leave the field blank.
5. Click Restore to return values to those saved last, and re-enter values or click Update to save changed values.
6. Optionally, you can click Account Details or Contact Details to take you to their respective pages to define accounts and contacts for this party. Alternatively, you can access these pages by using the links under the Party relationship.
7. In the side navigation menu, select Accounts. Optionally, use the Account icon to the right of the Party page for a party of the type Party.
8. Select a party from the list of values and click Go so that the accounts for that party can be defined or viewed. You can define multiple accounts for a single party.
9. To mark an account for removal, select Remove for the account name.
10. Use the lists of values, Go buttons, and calendar icons as necessary to define account numbers, relationship types, and start and end dates.
11. Click Restore to return values to those saved last, and re-enter values or click Update to save changed values.

12. In the side navigation menu, select Contacts. Optionally, use the Contact icon to the right of the Party page for a party of the type Party.

The Party Contacts page appears. Source Type provides the source of information about the contact, which can be Employee or Party.

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

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

References

Owner Link under party relationship is described in the Transferring Ownership section.

3.11 Viewing Pricing Attributes

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

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

Prerequisites

You must have selected a product and navigated to a Product Details page. Advanced pricing attributes must have been populated from the sales order from which this product was sold.

Steps

1. In the side navigation menu, select Pricing.
The Pricing page appears. Here you can view and set value for pricing attributes.
2. Use the context filter to select a particular set of pricing attributes.
The contexts are part of the setup for extended pricing attributes in Order Management.
3. Click Go. A list of pricing attributes and associated values appears.
4. Edit the values as necessary.
5. Click Restore to return values to those saved last, and re-enter values or click Update to save changed values.

3.12 Working with Counters

With the Counters application, you can define a counter construct called a counter group for an item to monitor the usage of customer products and services and execute business processes based upon the usage information. Common everyday objects that have counters are an automobile (the odometer), a gas meter, and a photocopy machine. Counters are created for an instance at the time of instance creation if the counter group is associated with the item in the Counters application.

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

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

Prerequisites

You must have selected a product and navigated to a Product Details page. A counter group must have been associated with the instance and the counters already created for the instance.

Steps

1. In the side navigation menu, select Counters.

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

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

3.13 Working with Contracts

In the Contracts page, you can view service contracts and warranties associated with an item instance. The list of contracts is displayed, with the link on the contract ID to a detailed contract page.

Prerequisites

You must have selected a product and navigated to a Product Details page. Service contracts must have been created for the instance.

Steps

1. In the side navigation menu, select Contracts.

The Contracts page appears and displays the current contract information.

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

3.14 Working with Notes

In the Notes page, you can view and update notes, including attachments to an instance.

Prerequisites

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

Steps

1. In the side navigation menu, select Notes.

3.15 Viewing Transactions

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

Technical Note: Each time a change is made to the instance, it is stored in history by transactions ID. The number of transactions made available for immediate view is determined by the dump frequency parameter in the Install parameter.

Prerequisites

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

Steps

1. In the side navigation menu, select Transactions.

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

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

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

3.16 Splitting Quantities

In the Split Quantity page you can subdivide a product with quantity greater than one into parts whose total quantities equal the original quantity. You can split the original quantity into two or n parts. Install Base automatically creates serviceable products under serial control with a quantity of one. Only nonserialized products are created with a quantity greater than one. When an instance is split, Install Base retrieves from Oracle Contracts the appropriate coverage for the newly created instances.

Some reasons for splitting quantities are as follows:

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

Use this procedure to split quantities.

Prerequisites

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

Steps

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

The application displays information for the newly created instances.

3.17 Transferring Ownership

In the Owner page, you can transfer ownership of a product from one active party to another.

The account field is mandatory only if the party is external. Other owner types can be Employee and Vendor. Ship-to and Bill-to location can be modified on this page.

Use this procedure to transfer ownership.

Prerequisites

- You must have selected a product and navigated to a Product Details page.
- A transfer must have two valid parties to occur.
- The two valid parties must have been set up in the Contact Center as related customers if All Party Locations is not selected. If this parameter is selected, then all parties are available for selection
- Valid parties must have been set up. The LOV for the transferred-to party is controlled by the All Party parameter setup in the Install Base Parameter setup. If All Parties is selected, then the LOV displays all available parties to be selected. If this parameter is not selected, then only parties set up as related in Accounts Receivable will be displayed.
- Locations must have been set up. For the ship-to and bill-to locations LOV, only locations set up as ship-to and bill-to for the selected party and its related parties will be displayed.
- The transfer date defaults to sysdate. However an earlier transfer date is also accepted.

Steps

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

After an instance is transferred, Install Base supplies Oracle Contracts with information about the change of ownership and the transfer date.

3.18 Working with Service Requests

In the Service Requests page, you can view the service requests that have been logged for the instance. Earlier, when the service request was made, a check probably was made to Install Base to get current information about the account.

Use this procedure to view service requests.

Prerequisites

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

Steps

1. In the side navigation menu, select Service Requests.
The Service Requests page appears.
2. Use the View Service Requests list of values and Go button to select a category of service request to display.
3. For displayed records, click the entry under Details for further information.

3.19 Viewing Repair Orders

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

Prerequisites

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

Steps

1. In the side navigation menu, select Service Requests.
The Service Requests page appears.
2. In the View Repair Orders list of values, select the category of repair order.
3. Click Go.
Any related repair orders appear.

3.20 Viewing History

In the Product History page you can view the state of the attributes of an instance by specifying a date/time stamp or a version label. Whenever a new version label is entered and saved, the application takes a snapshot of the existing instance and make it available for view on this page. This page is different from the Transactions page, which shows the changes made to an instance transaction by transaction. Use this procedure to view product history.

Prerequisites

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

Steps

1. In the side navigation menu, select History.
The Product History page appears.
2. Enter selection criteria:
 - Enter a value in the Version Label field. Use the % placeholder and the Go button as necessary to help you to enter an appropriate version label.
Selection of an entry from the Go version label list also provides the entry's associated date and time.
 - Alternatively, you can leave the Version label field blank and enter a date and time.
Date and Time refer to the time that a a certain version label was still current.
3. Click Retrieve History.
4. The available history appears and shows the times of changes as separate entries.
5. Click a link for an entry to display the details of the changes made at that time.

3.21 Working with Operating Units

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

Service Request. The Instance-Operating Unit association is for information only in this release. No other functionality is tied to it.

Use this procedure to work with operating units.

Prerequisites

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

Operating Unit relationship types are user-definable and must have been set up in Install Base administration.

Steps

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

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

2. If you want to delete a displayed association with an operating unit, click the Remove icon for that unit. The removal will take effect permanently on clicking Update.
3. To modify or add a new association as necessary, enter values for the operating unit, type, start date, and end date. Use the % placeholder and the Go button as necessary to help you to enter an appropriate operating unit.
4. Click Restore to return values to those removed last, and re-enter values or click Update to save changed values.

3.22 The Product Configuration Page

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

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

The relationship types supported for on-line configuration updates are as follows:

- COMPONENT-OF
- CONNECTED-TO
- UPGRADED-FROM

- INSTALLED-ON
- MEMBER-OF
- PROVIDED-BY

The relationship types supported from Order Management integrations are as follows:

REPLACED-BY

REPLACEMENT-FOR

These relationship types are view-only.

Selective Page Description

View Relationship Type Field

Defines the type of relationship that you seek from the LOV. Click Go to make the relationship current. For explanation of relationship types, refer to [Understanding Relationship Types](#).

Select Column

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

Description Column

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

Expire Button

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

Add Button

Use this to add an existing item instance to the selected instance.

Create Button

Use this to create an item instance to add to the instance displayed in a row. This takes you to the Create Instance page, where you can create a new instance as a child of the instance from the configuration page.

Show Parent Button

Use this to view the parent of a configuration.

3.23 Understanding Relationship Types

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

Install Base supports the following relationship types:

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

Component-Of

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

The component-of relationship type is the only one that flows down the current location and install location from parent to child. From ERP integration, only the creation of serialized top-assembly is supported, with the exception of ATO and PTO models. Online creation of component-of relationships is supported for non-serialized top assembly as well. All configuration creation is allowed for customer products only. Another constraint is that the type does not support many-to-many and cyclic relationships.

An example:

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

- RAM
- Monitor
- Keyboard
- Mouse

Connected-To

This relationship type can be used to maintain the connection scheme of a group of item instances. In other words, it can be used to represent a network of connected items. No rule controls this relationship type, unlike the case of the component-of relationship type. This application does not support many-to-many and cyclic relationships.

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

```
john-pc-01
|__vivek-sun
|__jenny-pc
    |__print-server-05.2
    |__ST-Tool-Server-1
```

Upgraded-From

This relationship type is used to store the relationship between item instances when some of the item instances are upgraded from others. This type of relationship is especially useful in tracking software instances and their relationships with each other. No rule controls this relationship type, unlike the case of the component-of relationship type. The only constraint is that it does not support many-to-many and cyclic relationships.

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

```
Win 3.1.1
|_____Win95
|           |_____Win95-patch 1.1.2
```

```

|           | ____Win95-patch 1.2.0
|
|____Win98

```

Member-Of

This relationship type is typically used to maintain the configuration of a group or system of item instances and provides the flexibility to maintain multi-level grouping of item instances. No rule controls this relationship type, unlike the case of the component-of relationship type. The only constraint is that it does not support many-to-many and cyclic relationships.

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

Nissan 240 SX (serial # NS-23405679-278)

```

| ____Fuel Injection system
|           | ____Fuel injection valve-1 (serial # E-34897)
|           | ____Fuel injection valve-2 (serial # E-22787)
|           | ____Fuel Filters
|
| ____Cooling System
|           | ____Radiator (serial # X-44545)

```

Installed-On

This relationship type is typically used for software item instances to capture their installation information. No rule controls this relationship type, unlike the case of the component-of relationship type. The only constraint is that it does not support many-to-many and cyclic relationships.

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

```
ffaruqi-pc
```

```
|__Solaris 4.5
|   |__Oracle 8.0.5
|   |__Net Monitor 2.0
|
|__Windows NT 4.0
    |__Microsoft Office 2000
    |__Norton Anti Virus
```

Provided-By

This relationship type is typically used to maintain relationships between systems and the services provided by them. No rule controls this relationship type, unlike the case of the component-of relationship type. The only constraint is that it does not support many-to-many and cyclic relationships.

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

```
Sprint PCS Service ((408-255-6787)
  |__Messaging Service
  |   |__Voice Mail Service
  |   |__Paging Service
  |
  |__Internet Access
  |   |__Oracle Mobile Services
  |
  |__Sprint Emergency Roadside Assistance Service
```

3.24 Adding a Subproduct

Use this procedure to add a subproduct.

Steps

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

The Search Subproducts page appears.

2. Use Saved Searches as necessary to display the appropriate subproduct.
3. From the Select column, select the item that you want to add.
4. Click Add as Child.

The subproduct is added to the structure.

3.25 Creating a Subproduct

Creating a subproduct involves both creating an item instance and defining it as a child in a relationship. In the Create Sub-Product page, you can create an instance as a child to the one selected from the configuration page. This page is the same as Create a Product page. The page has regions for general item information, owner information, current location, item flags, and item views. Use the following procedure to create a subproduct.

Prerequisites

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

Steps

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

The Create Sub-Product page appears.

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

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

Click the calendar icon to help you enter dates.

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

3. Click Create Child.

The subproduct is added to the structure.

Using the Transactions Tabbed Page

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

Transaction types are specified for any transaction source that has defined interfaces with Install Base. For example, transaction types from Oracle Applications include Order Management - Fulfillment, Order Management - Shipment, and RMA Receipt. Oracle Enterprise Install Base contributes types such as PO Receipt into Project, and Asset Retirement. Many more types are available. Refer to the Transaction Type setup in the *Oracle Install Base Implementation Guide*.

For each transaction type, subtypes can be defined to further specify the actions on one or more Install Base records if the subtypes are selected for the interface transaction. These subtypes can be selected from a list of values in the transaction detail window from the ERP calling application, such as Order Management sales order line. Such transaction types, subtypes, and actions can be defined in the Transaction Sub Type setup window. Refer to the Transaction Subtype setup in the *Oracle Install Base Implementation Guide*.

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

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

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

4.1 Searching Transactions

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

Selected Page Definitions

Field	Description
Source Group Ref	Such as a PO group number
Source Header Ref	Such as a sales order number
Source Line Reference	Such as a sales order line number
Source Transaction Date	Date of the source transaction
Transaction Date	Actual date the transaction occurred
Inventory Material Transaction ID	ID found in an Inventory material transaction

Prerequisites

None

Steps

1. In the Products tabbed page, click the Transactions tab.
The Search Transactions page appears.
2. Enter a transaction type.
As an aid, use the Go button to display a list from which you can select the desired transaction type.
3. Enter values in other fields to further qualify your search criteria as needed.
As an aid, use the calendar icon to specify desired dates.
4. If necessary, click Clear to blank out your entries, and re-enter them.
5. Click Submit to display the transactions that meet your search criteria.
6. To see the a list of the instances under a transaction, click the link for its transaction ID.

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

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

Using the Systems Tabbed Page

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

5.1 The Systems Page

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

Remove

Marks a system for removal when you click Update.

System ID

A unique identifier whose link takes you to the Systems Details page, where you can view and edit system details.

Number

An autogenerated system number.

View Configuration (Icon)

Displays a graphical representation of the system configuration.

Products (Button)

Displays the products that are tied to the system.

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

Create (Button)

Displays a page where you can define a new system.

Update

Removes those systems marked for removal.

Refine Search

Displays a page where you can refine your search criteria for systems.

5.2 Refining a Systems Search

In this page you define the search criteria for the display of systems on the search summary of the Systems page. Use this procedure to filter this display.

Prerequisites

None

Steps

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

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

5.3 Working with System Details

In the Systems Details page you can view and edit system details such as installation location, shipping and billing location, and contacts. This is the only place where you can build a hierarchy of systems, by entering the parent name for the system. To transfer a system, you can change the party name and associated party number. Use this procedure to work with system details.

Steps

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

5.4 Working with System Configurations

In the Systems Configurations page you can see a graphical representation of a system. From this perspective you can also launch into pages to display and edit system details. You can build a system hierarchy only on the System Details page. Use this procedure to work with system configurations.

Steps

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

The selected system becomes the top of the displayed configuration hierarchy.

2. To expose any configuration components below one with a right-pointing arrowhead, click the arrowhead.

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

Clicking Show Parent shows the parent of the configuration

3. To access the details of an exposed system, click its name.

The System Details page for that system appears.

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

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

5.5 Creating a System

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

You can create a system only for an external party (customer) with an account number. System type is mandatory. You can assign a parent system only with the same owner and account.

Use this procedure to create a system.

Steps

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

The Create System page is like the Systems Details page but has no values supplied.

2. As necessary, enter appropriate values in information fields. As aids, you can use calendar icons, generic entries, and Go buttons to help you to select values.
3. If you need to correct many entries, click Clear to blank out values, and enter new ones.
4. Click Create to save your work.

5. To create other components of the system, repeat the previous steps in this procedure.

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

Using Oracle Install Base Intelligence

You can use Oracle Install Base Intelligence to view reports based on historical and current data and using the following criteria:

- Expiring products by year
- Revenue generated for products by year. These prices are from those recorded in Oracle Order Management.
- Number of products sold by year

This report data appears summarized in boxes called bins and modules from which you can click links to drill down to more detailed reports. Modules present more specific and detailed information than bins. You can customize the selection, arrangement, and report contents of bins and modules.

This topic group covers the following topics:

- [Accessing Install Base Intelligence](#)
- [Arranging Bins and Modules](#)
- [Editing Bins and Modules](#)

6.1 Accessing Install Base Intelligence

Oracle Install Base Intelligence is closely related to Oracle Install Base, but it is a different application. As such, it may require different criteria than does Oracle Install Base to log in to the HTML mode of Oracle Applications. Use the URL, user name, and password provided by your local system administrator for Oracle Install Base Intelligence.

6.2 Arranging Bins and Modules

Use this procedure to choose and arrange the bins and modules for your product reports.

1. Navigate to Install Base Intelligence.

The Welcome page of the Product Reports tabbed page appears with a default or previously defined set of bins and modules displayed.

2. To modify the number and arrangement of the displayed bins and modules, click Personalize.

The Personalize Your Homepage page appears. It is for designing a two-column display.

3. If you want to design a three-column display, click Switch to 3 Columns.
4. Use the horizontal arrows to move report titles between available bins and displayed bins.
5. Similarly, use the horizontal arrows to move report titles between available modules and displayed modules.
6. Use the vertical arrows to arrange the display sequence of displayed bins and modules.
7. Click Update.

The Welcome page reappears and shows the bins and modules in the arrangement that you designed.

6.3 Editing Bins and Modules

Use this procedure to edit the definition of bins and modules that appear on your Welcome page or on pages that you can reach from links on the Welcome page.

1. Navigate to Install Base Intelligence.
2. Navigate to the page that contains the bin or module that you want to edit.
3. In the bin or module that you want to edit, click the Edit link.
4. A page appears that shows the parameters that are appropriate for the bin or module.
5. If you want to edit both these parameters and associated attributes, click Personalize from the side navigation menu.

6. Enter the desired values for the displayed parameters and attributes.
7. Click Update.

The edited page reappears and shows the modification to the bin or module.

Using the Transaction Details Window

In the Transaction Details window you can update Install Base with attributes provided for an item that is being sold or returned. In addition, you can update a referenced item instance.

This topic group covers the following topics:

- [Accessing the Transaction Details Window](#)
- [The Transactions Details Window](#)

7.1 Accessing the Transaction Details Window

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

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

1. Using the URL, user name, and password provided by your local system administrator, log in to the forms mode of Oracle Applications.
2. From the Responsibilities menu, select the Order Management Super User responsibility, and click OK.
3. From the Navigator, choose Orders, Returns > Sales Orders.
The Sales Orders window appears.
4. Enter an appropriate sales order number in the Order Number field to populate the window.
5. In the Line Items tabbed page, select a line.

6. Click Actions.

The Actions window appears.

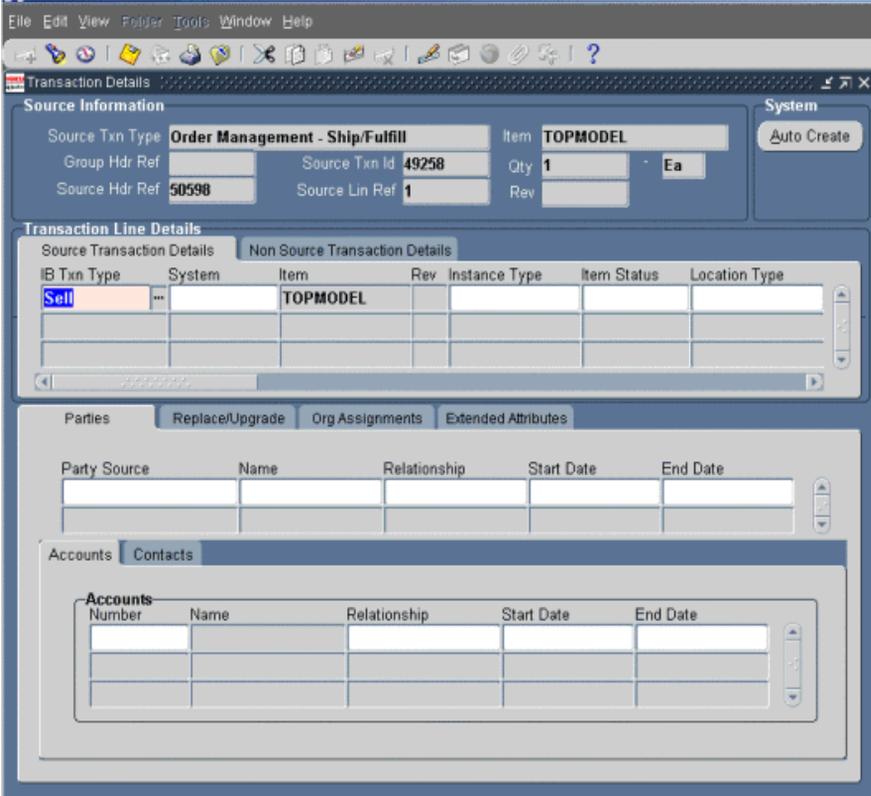
7. Select Installation Details and click OK.

The Transactions Details window appears.

7.2 The Transaction Details Window

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

Figure 7-1 Transaction Details Window



Source Information Region

In this region you can define the updates to be made for the item being sold or returned on the sales order line.

System Region

Auto Create Button

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

Transaction Line Details Region

Source Transaction Detail Tab

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

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

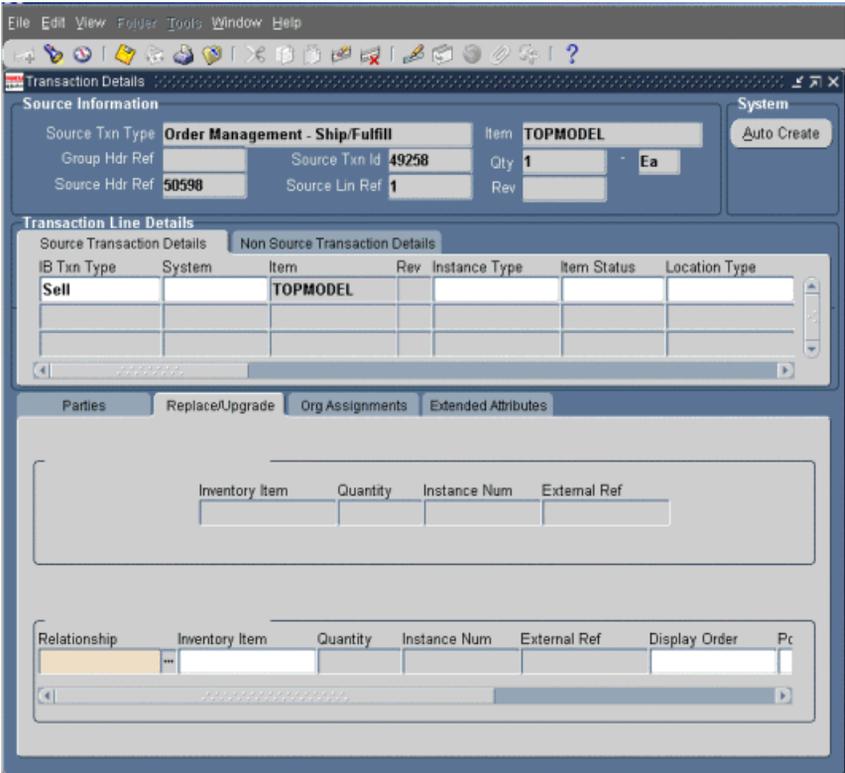
Parties Tab

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

Replace/Upgrade Tab

The Replace/Upgrade tabbed page is used to specify the Replaced-by and Upgraded-from relationships between the instance in the source region and the one defined in the non-source region. If this page is used, then the non-source region must be populated.

Figure 7-2 The Replace/Upgrade Tab of the Transaction Details Window



Org Assignments

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

Figure 7-3 Org Assignments Tab

Name	Relationship	Active Start Date	Active End Date	Core
		11-SEP-2001		<input type="checkbox"/>
				<input type="checkbox"/>

Extended Attributes

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

Figure 7-4 Extended Attributes Tab

Name	Attribute Source	Attribute Value	Active Start Date	Active End Date	Core
COLOR	CSI_I_EXTENDED_ATTR				<input type="checkbox"/>
MANESH	CSI_I_EXTENDED_ATTR				<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Accounts

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

Contacts

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

Non Source Transaction Detail Tab

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

Using the Transaction Errors Window

In the Transaction Errors window you can reprocess transactions that failed to update Install Base from certain ERP sources.

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

This topic group covers the following topics:

- [Reprocessing Transactions](#)

8.1 Reprocessing Transactions

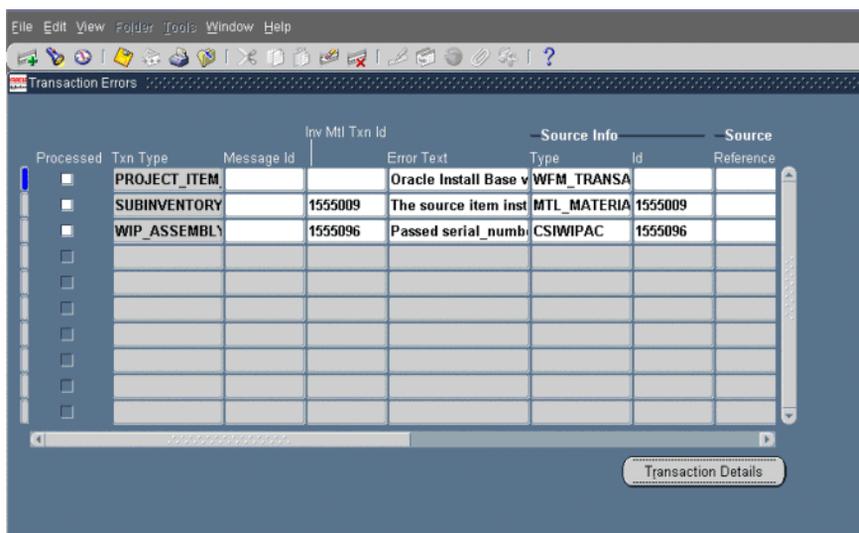
If an ERP source transaction is successful and the Install Base update errors-out, then the transaction appears with error text in the Transaction Errors window. You can correct the error, typically using the Transaction Details window. Then you can

select the transaction and reprocess it to update Install Base. If the transaction is unsuccessful, then the same record is updated in this window.

Use this procedure to reprocess a transaction.

Steps

1. From the Responsibilities menu of the forms mode, select the Oracle Install Base Admin. responsibility, and click OK.
2. Navigate to Error Transactions Reprocessing.
3. Query the transactions.
4. Correct the transaction.
5. Select the corrected transaction to be reprocessed by selecting its Processed checkbox.
6. Save the data.
7. From the Request/ Run request menu, choose Resubmit Interface Process from the LOV.
8. Choose to process selected transactions or all transactions.
9. Submit the request.
10. Optionally, schedule this job to run at regular intervals.

Figure 8–1 Transaction Errors Window

The following table describes the fields in the Transaction Errors window.

Field	Description
Processed	Select this checkbox to reprocess the related transaction. After you select this box and save the record, the concurrent program will pick it for reprocessing.
Transaction Type	The type of the failed transaction. A transaction type is predefined in the Install Base source transaction types. For example, if the error occurred while performing an inter-organizational transaction, then the transaction type is INTERORG_TRANSFER.
Inventory Material Txn Id	The inventory material transaction ID corresponding to the Install Base transaction.
Error Text	The exact reason of the error. You must correct this cause to reprocess the transaction.

Field	Description
Source Info Type	The source of the transaction type. It provides more details for the transaction type. For example, if the transaction type is INTERORG_TRANSFER, then the source information type is MTL_MATERIAL_TRANSACTIONS. The possible Source Info types are ASSET_CREATION, ASSET_MOVE, CSISOSHP, MTL_MATERIAL_TRANSACTIONS, NORMAL_ITEM_ASSET, NORMAL_ITEM_EXP_ITEM, and WFM_TRANSACTIONS.
Source Info Id	The transaction ID corresponding to the Install Base transaction if the source is not Inventory.
Source Header Reference	The document number of the transaction, such as a sales order number.
Source Header Reference Id	The document header ID, such as an order header ID.
Source Line Reference	The document line number, such as an order line number.
Source Line Reference Id	The document line ID, such as an order line ID.

Using the Mass Edit/Future Dated Transaction Window

In the Mass Edit/Future Dated Transaction window you can schedule several changes to be made to a group of instances and to be performed at a specific date and time. Such changes include location, party ownership, accounts, and contacts.

This topic group covers the following topics:

- [Using the Mass Edit Functions](#)

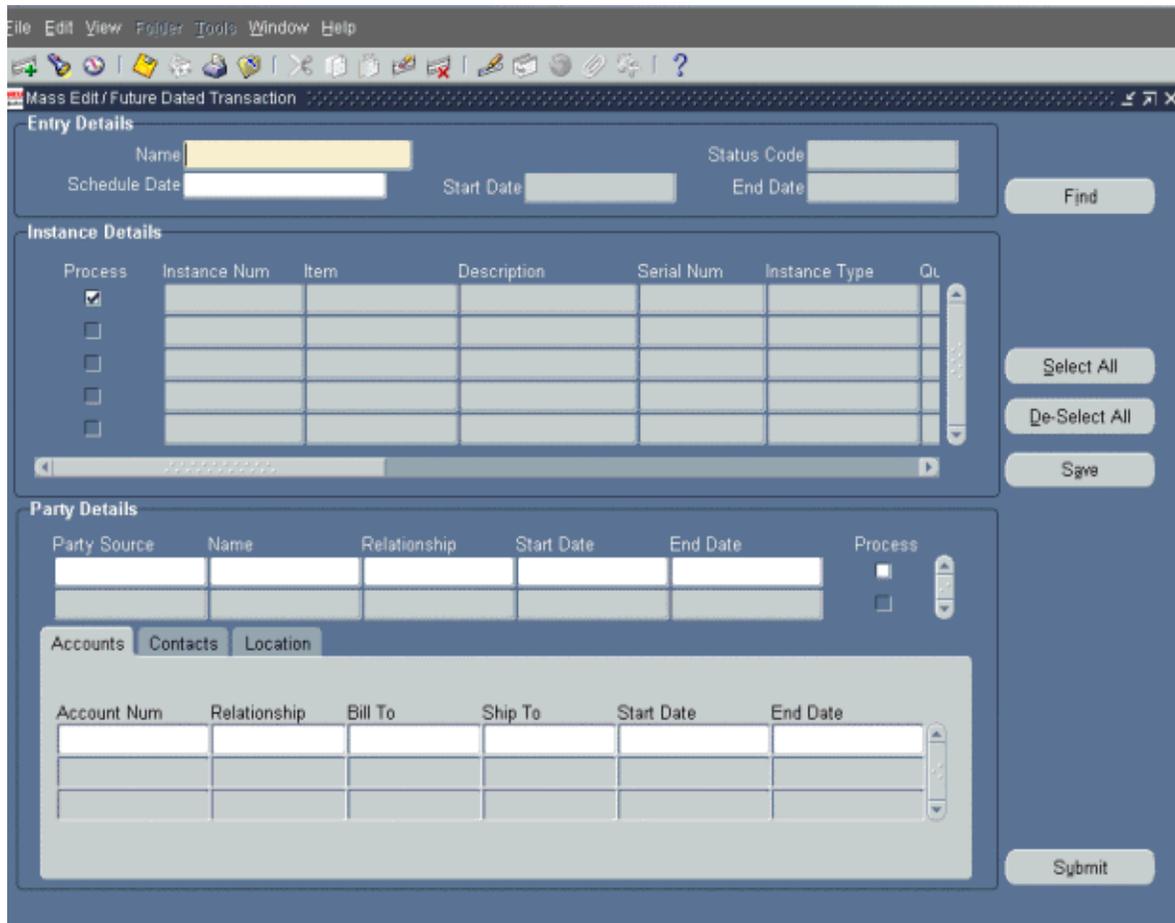
9.1 Using the Mass Edit Functions

Use this procedure to use the mass edit functions.

Steps

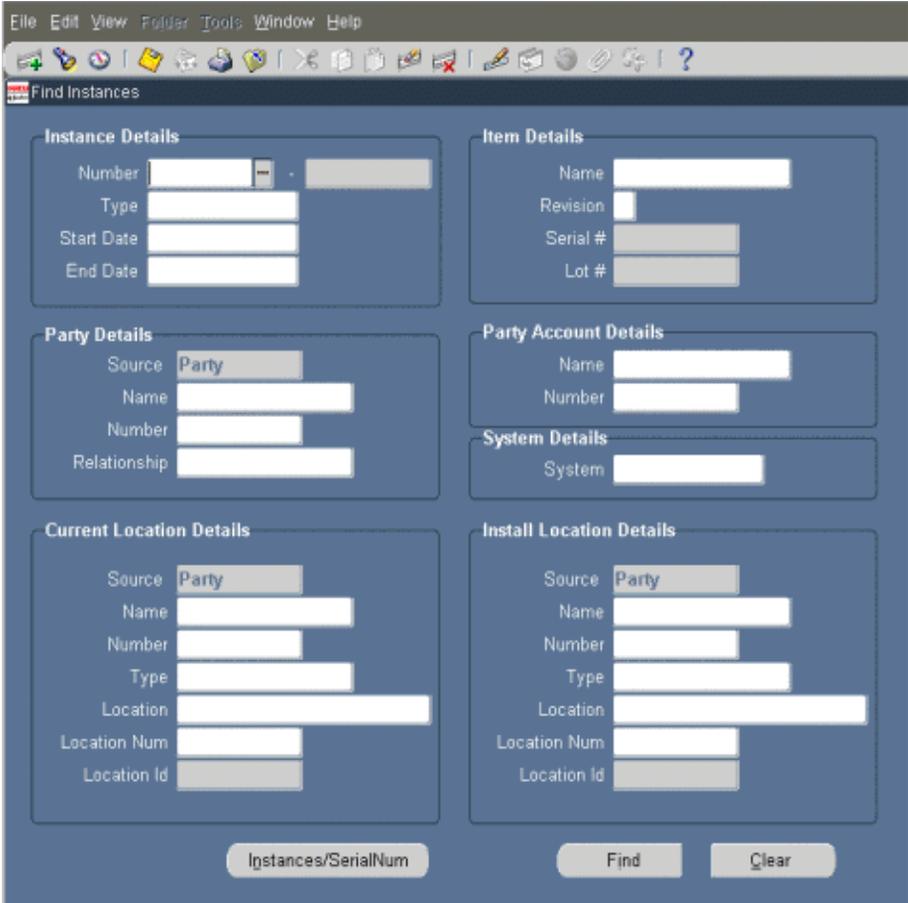
1. From the Responsibilities menu of the forms mode, select the Oracle Install Base Administrator responsibility, and click OK.
2. Navigate to Mass Edit.

The Mass Edit/Future Dated Transaction window appears.



3. In the Entry Details region, click Find so that you can retrieve the required instances.

The Find Instances window appears.



- 4. Specify the search criteria based on details such as the instance, item, party, party account, current location, install location, system, and specific serial number or range of serial numbers.
- 5. Click Find.
The selected instances appear in the Instance Details region of the Mass Edit/Future Dated Transaction window.
- 6. As necessary, further refine the instances to process by using Select All, De-Select All, and the Process checkboxes.

7. Supply a value for the Name field of your mass edit session, and click Save. You can retrieve a mass edit definition in the future by using this name.

In the Party Details region, the existing relationship types collectively owned by the instances appear. The owner relationship is the first one to be displayed.

8. As desired, change the party by selecting another value from the LOV.
9. As desired, change the owner. If you do so, you must also change the account number.
10. Optionally, specify start and end dates for changes to the party and account. If you do not specify a start date, it defaults to the date that the mass edit transaction is run.
11. Similarly, use the Contacts tabbed page to make any necessary changes to contacts for a selected party.

The screenshot shows a software interface titled "Party Details". At the top, there is a "Process" checkbox which is checked. Below it is a table with the following columns: "Party Source", "Name", "Relationship", "Active Start Date", and "Active End Date". The first row of the table contains the values "Party", "AT&T Universal C", "OWNER", and "16-NOV-2001". Below the table, there are three tabs: "Accounts", "Contacts", and "Location". The "Accounts" tab is currently selected, and it shows a similar table structure with the same columns as the one above.

12. Similarly, use the Location tabbed page to change the current location or the install location for all selected instances. The location LOVs are restricted to that of the default party and its related parties. If the location of another party is required, then change the party name (Current Party or Install Party) on this page in order for the LOV of its locations to appear. The LOV of parties displayed is controlled at the time of implementation by the All Parties parameter setup.

The screenshot shows a software window titled "Party Details". At the top, there is a table with columns: Party Source, Name, Relationship, Start Date, End Date, and Process. The Start Date field contains the text "18-JUL-2002". Below the table are three tabs: "Accounts", "Contacts", and "Location". The "Location" tab is selected, and it contains a section titled "Locations" with two columns of input fields. The left column has fields for "Current Party", "Current Loc Type", "Current Loc", and "Current Loc Num". The right column has fields for "Install Party", "Install Loc Type", "Install Loc", and "Install Loc Num".

13. In Schedule Date of the Entry Details region, enter a date and time for the mass edit transaction to run. If you enter today's date without a time, then the background scheduler will pick it up at the next time that it runs.

14. Click Submit.

On the specified date and time, this Mass Edit job runs as a concurrent program. Thereafter, the Status Code field will be updated in the Entry Details region of the mass edit window with the mass edit name that you specified.

15. Optionally, view the details of the run in the log of the concurrent program. The status on the View Request indicates only the status of the concurrent program. If the job is submitted right away, a request number will be displayed for you to track in View Request.

16. Optionally, use View Request to monitor the status of your submitted job. After the job completes, you can open the log file to view the update results and error messages.

17. For the records that error out, make corrections to the associated instance, and resubmit the mass edit job.

The application processes only the error records, and you can view the results in the log file.

Implementing and Using Counters

This topic group describes the setup and use of the Counters application, whose counters frequently are associated with instances that Install Base tracks.

Counters has very few implementation tasks that are typical for other applications. When you implement Counters, you mostly use the same windows that an end user uses to run the application. During implementation, however, the emphasis tends to be on designing the counter and group templates for end users. For these reasons, this topic group includes both implementing and using tasks.

10.1 Overview of the Counters Application

Using the Counters application you can define counters to track the usage of a customer's product or service and execute business processes that are based on the usage information. Common everyday objects that can have counters are automobile odometers, gas and electric meters, and office equipment such as photocopier machines. Counters provide a mechanism for tracking new product warranties, service contracts, support agreements, and similar business needs.

Service providers rely on counts that originate from time, distance, or usage to closely track the usage of a product or service and to monitor these status counts to:

- Manage product warranties and external warranties
- Manage service, rental, and leasing contracts
- Know when the time has come to reorder or ship parts
- Determine billing cycles and rate change
- Trigger product preventive maintenance or overhauls
- Calculate product reliability

- Perform lifecycle tracking

For example, a company that services photocopiers can use counters to determine how often service must be performed on each piece of equipment, or to know when consumable items such as toner cartridges and paper must be replenished at the customer's site. Counters can provide the trigger mechanism for a contract or rental agreement to alert the service provider that an upcoming event such as a preventive maintenance or overhaul is coming due, to automatically adjust a price formula or rate table change, or even signal a contract renewal date or expiration date.

Other types of service counters can be set up to track the activities of a customer support contract to monitor the total number of calls or time spent by the support agent on each call or to escalate those calls that have reached a critical status.

The Counters application supports the following Service applications:

- Customer Care
- Install Base
- Service Contracts
- Depot Repair
- Field Service
- Mobile Field Service
- Spares Management
- Logistics
- Advanced Service Online

The Service applications can create a unique set of counters and templates that are required to satisfy their individual business needs for each product or service residing in their Install Base. Updates must be performed regularly using a standard set of business practices incorporated by each service provider.

10.1.1 Definitions

Here are definitions of some basic terms used in Counters.

Table 10–1 Definitions and Terms

Feature Name	Function
Physical Counter	An incremental electro-mechanical or software device built into a product to track equipment usage. These counters are tangible and can rollover to a specified value, be reset to any value, or replaced if broken during normal operation.
Formula Counter	An intangible or derived counter that runs inside a software application program, keeping track of usage of a product or service. A common logical counter is the number of service telephone calls made by a customer against a particular product or service. Logical counters can be added or combined with other counters to form a new counter.
Counter Template	A template that is defined for groups of counters and instantiated in Install Base customer products or contract lines. A template can be defined for a single counter or a group containing one or many counters.
Counter Group	Can be associated with a product or service and is permitted to have only one associated counter group. Group templates can also be applied with multiple Install Base products or contract lines. After a counter group is instantiated, it can be modified for a single instance or for all instances. A single counter group can be defined for each Install Base customer product or contract line to automatically instantiate a counter, or be manually instantiated by selection from a predefined counter or counter group template.

10.1.2 Typical Tasks Associated with Counters

Capture Counter Readings

Counter readings can be entered manually using the Capture Counters window. This window is available from Service Request, Depot Repair Orders, Field Service, Service Contracts, and Contracts Authoring windows.

Capture Miscellaneous Reading Adjustments

Miscellaneous reading adjustments can also be captured for counters. Miscellaneous reading types can be defined using the Misc. Reading Types LOV

Lookups window to describe any kind of adjustment. For example, it can be a service counter used to adjust a technician's copy usage during a PM Service or repair of a customer's photocopier machine.

View the Counter History Log

The Counters application creates a new instance each time a reading event has been performed and saves the results in the counter history log. The log contains a sequential list of before and after counter captures with time and date stamp, and, if selected, the property source reference id. To view the log, launch the Capture window and then click the View History Reading button.

Install Base Life Cycle Tracking

Counters uses Install Base to manage and track reading history related to an item, service, or contract throughout the active lifecycle. If a transfer of ownership occurs, the reading history appears with the record.

Reset Counters

Certain service providers require that a counter reset is performed to re-establish a new starting point for a product or service. A counter reset can be performed from the Counter Capture window, and each reset event will be recorded in the history file.

Modify Counters

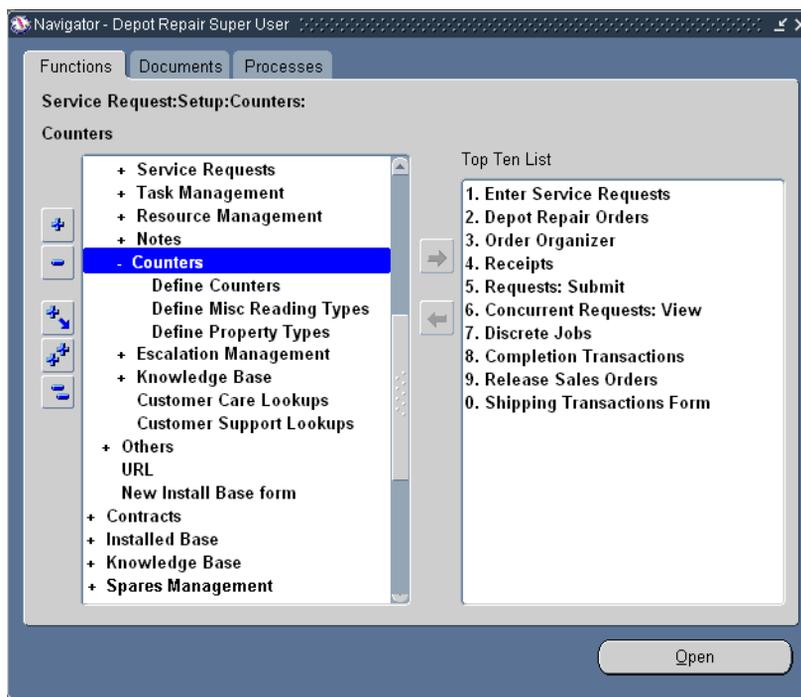
Counter groups and counters can be modified after instantiation with a product or service. To modify a counter instance, navigate to the Counters Setup window from the application Navigator window. See Using Counters for more information.

10.2 The Basics of Counters

10.2.1 Accessing Counters

You can access the Counters windows as follows:

1. Using the Forms mode, log in with the Customer Support or Depot Repair Super User responsibility.
2. Navigate to Counters.

Figure 10–1 Navigator Window

The following Counters setup windows are accessible from the Navigator:

Table 10–2 Counters Functions from the Navigator

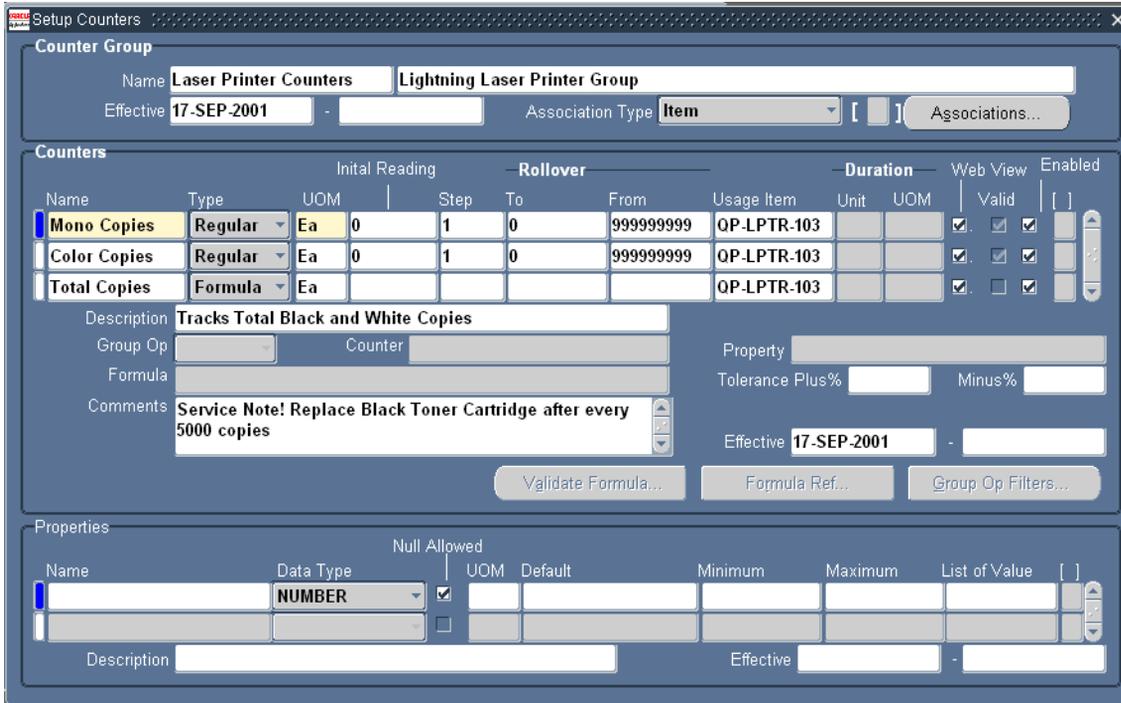
Navigator Item	Functional Description
Define Counters	View and define counter group templates and counters.
Define Misc. Reading Types	View and define miscellaneous reading types for LOV lookups.
Define Property Types	View and define and counter property types and values for LOV lookups.

You access the main window of Counters, Setup Counters, by choosing Define Counters from the Navigator.

10.2.2 The Main Window of Counters

Setup Counters is the main window of Counters.

Figure 10–2 Setup Counters Window



The following table provides a description of the Setup Counters window:

Table 10–3 Description of the Setup Counters Window

Feature	Function
Counter Group Region	Defines the counter template used for an associated product, service, or service contract line.
Association Type LOV	Defines if the counter group is associated with a BOM (Bill of Material), item, or service.
Associations Button	Displays an Associations window to link the specified counter group to a product, service, or usage item.

Table 10–3 Description of the Setup Counters Window

Feature	Function
Counters Region	Defines the individual counters contained in the counter group.
Counters Types	Displays an LOV drop down list of counter types of Regular, Group Function, Formula, or Time Based.
Validate Formula Button	Validates the entered formula as a valid SQL expression for a formula counter.
Formula Ref. Button	Displays a window to allow definition of the references used in the formula and to indicate if a reading type uses a current or delta reading.
Properties Region	Defines additional counter reading properties for regular counters that are data types of Number, Date, or Character.

10.2.3 Explanations and Defaults

The following table contains explanations and defaults used in Counters.

Table 10–4 Explanations and Defaults

Usage items for a counter	The list of values for Usage Item is based on master items that have been identified with the value Usage Items. This flag is set in the Master Items window on the Service tabbed page for serviceable items. See Implementing Inventory for more information.
Use of SUM and COUNT in formula counters.	SUM totals all reading history for the counter and provides an accumulated total of the counter readings. COUNT counts the total number of readings that have occurred prior to resetting the counter. For example, take a counter that had three readings and was reset after each reading. If the three readings are 100, 100, and 100, then SUM returns 300, and COUNT returns 3.
Use of the Direction LOV in the Setup Counters window	Ascending means that new counter readings must be entered in increasing order. Descending means that new counter readings must be entered in decreasing order. A blank selection means that counter reading may be entered in any order. After you have selected a direction and entered a reading, you cannot change the direction.

10.3 Prerequisites

As prerequisites to the setup of Counters, perform the following:

- Confirm the setup of all applications at your site that will use Counters.
- Confirm the setup of inventory items. Refer to the *Oracle Inventory User's Guide*.
- Confirm the setup of unit of measure. Refer to the *Oracle Inventory User's Guide*.

10.4 Setup Checklist

1. Required. Define counter group templates. Refer to [Section 10.5](#).
2. Required. Confirm the setup of user-definable counter property lookups. Refer to [Section 10.7](#).
3. Optional. Define regular counters. Refer to [Section 10.8](#).
4. Optional. Define group function counters. Refer to [Section 10.9](#).
5. Optional. Define formula counters. Refer to [Section 10.10](#).
6. Optional. Define time-based counters. Refer to [Section 10.11](#).
7. Required. Confirm the setup of the concurrent program for the time-based Counters engine. Refer to [Section 10.13](#).
8. Required. Define profile options. Refer to [Section 10.14](#).
9. Required. Instantiate Counters. Refer to [Section 10.19](#).

10.5 Defining a Counter Group

Use this procedure to define a counter group.

Steps

1. Enter a Counter Group Name and Description.
2. Select a Start Date from the Calendar LOV to activate the counter group.
3. Select an end Date from the Calendar LOV or leave it blank for no expiration.
4. Select an Association Type from LOV to associate the Counter Group with a type.

Seeded types are BOM (Bill of Material), Item, and Service. Association Types - BOM and Item are Master Items that have been identified as Serviceable

Products and share the same list of values, whereas Service is based on Master Items that are identified as Support Services. See [Implementing Inventory](#) for more information.

5. Click Associations to launch the window.
6. Select an item from the LOV drop-down list.
7. Enter a Description.
8. Click OK to return to the Setup window.
9. From the toolbar, click the Save icon to update and save the counter group.

10.6 Understanding Property Type and Values LOV Lookups

Counter property types and values LOV lookups are identifiers that link the source or person performing a counter reading update. As part of the capture process, the reader enters the new counter reading and appropriate property value to link his ID to the new capture. See [Defining Counter Property LOV Types](#) for defining these types and their values in the Counters application.

Business Case

A service provider sets up two (2) property types and values sets to identify his authorized service employees and customers performing counter updates on his service products in the field.

Example 1: Property Type and Value Codes for Seattle Mfg. Authorized Employees

In this example the service provider sets up a property type lookup table containing values for all service employees that are authorized to perform a counter reading.

Product: ABC Copier

Counter: Total Copies

Capture: 2765

Reader: Adams, Mr. Brian

Property Code: CS_CTR1

Description: Authorized Employees

Application: Oracle Service

Table 10–5 Value Set for the CS_CTR1 Property Code

Value Code	Meaning	Description
Depot_Tech.	Authorized Reader	Seattle Mfg
Depot_Mgr.	Authorized Reader	Seattle Mfg
Support_Tech.	Authorized Reader	Seattle Mfg
F/S_Eng.	Authorized Reader	Seattle Mfg

Example 2: Property Type/ Value Codes for Business World Authorized Employees

In this example the service provider sets up a property type lookup table containing values for Customer: Business World, and list of employees authorized to perform a counter reading.

Product: XYZ Printer

Counter: Total Copies

Capture: 1743

Reader: Beaulie, Mr. Andre

Property Code: CS_CTR2

Description: Authorized Customers

Application: Oracle Service

Table 10–6 Value Set for the CS_CTR2 Property Code

Value Code	Meaning	Description
Plant_Mgr.	Authorized Reader	Business World
Office_Mgr.	Authorized Reader	Business World
Maint_Mgr.	Authorized Reader	Business World
Maint_Tech.	Authorized Reader	Business World

10.7 Defining Counter Property LOV Types

Counters provides a setup window called CS Counter Property LOV Types Lookups to define a standard set of values that are used when setting up counters. Property types and values are used to associate and identify the source of a counter

capture. In order to use this feature, you must first define property types and values for property LOV lookups. Use this procedure to do so.

Prerequisites

None.

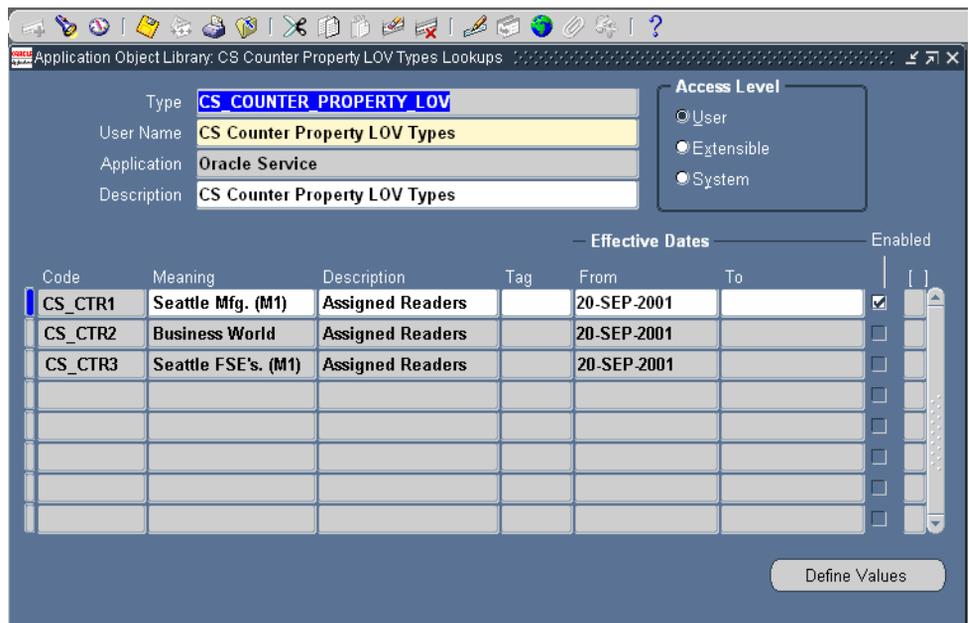
Steps

Define New Property Types

1. Navigate Service Request > Setup > Counters > Define Property Types.

The CS Counter Property LOV Types Lookups window appears with seeded header detail.

Figure 10–3 Window for CS Counter Property LOV Types Lookups



2. Define a Property Type by completing the following:
 - a. Enter a Code such as CS_CTR1.

Figure 10–4 Window for CS Counter Property Values Lookups

Application Object Library: CS Counter Property Values Lookups

Type:

User Name:

Application:

Description:

Access Level:

User

Extensible

System

Code	Meaning	Description	Tag	Effective Dates	Enabled	
				From	To	
Depot Mgr.	Authorized Reader	Seattle Mfg (M1)		20-SEP-2001		<input checked="" type="checkbox"/>
Depot Tech	Authorized Reader	Seattle Mfg (M1)		20-SEP-2001		<input type="checkbox"/>
F/S Mgr.	Authorized Reader	Seattle Mfg (M1)		20-SEP-2001		<input type="checkbox"/>
Support Mgr	Authorized Reader	Seattle Mfg (M1)		20-SEP-2001		<input type="checkbox"/>
Support Eng	Authorized Reader	Seattle Mfg (M1)		20-SEP-2001		<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

Define Values

7. Define a value by completing the following:
 - a. Enter a Code such as Depot Mgr .
 - b. Enter a Meaning such as Authorized Reader .
 - c. Enter a Description such as Seattle Mfg. (M1) .
 - d. Leave the Tag field blank.
 - e. Select a from date. The application automatically supplies one .
 - f. Select a to (end) date. Leave this blank if no expiration occurs.
 - g. Confirm that the Enabled checkbox is selected.
 8. Repeat steps 7a through 7g for each new code value that you wish to add to the table. Choose a different meaning for each code to avoid any duplication errors.
 9. From the toolbar menu, click the Save icon to update and save the record.
- The newly created values table is now linked to the Property Type Code line.

10. Click the X located in the top right-hand corner of the window to close it and return to the property types setup window.

Defining Additional Value Sets for Property Types

11. To create another values table, set focus on the next Code line located on the CS Counter Property LOV Types Lookup window and repeat steps 6 through 10.

10.8 Defining a Regular Counter (Physical)

Use this procedure to define counter types that are described as physical or regular counters, which typically are found in tangible objects such as automobiles, gas meters, and photocopier machines. A regular counter can also be classified as a logical counter. For example, consider a service agent who wants to track the number of support calls that he receives each day. The agent can set up a logical counter of type Regular and manually increment this counter at the completion of every support call.

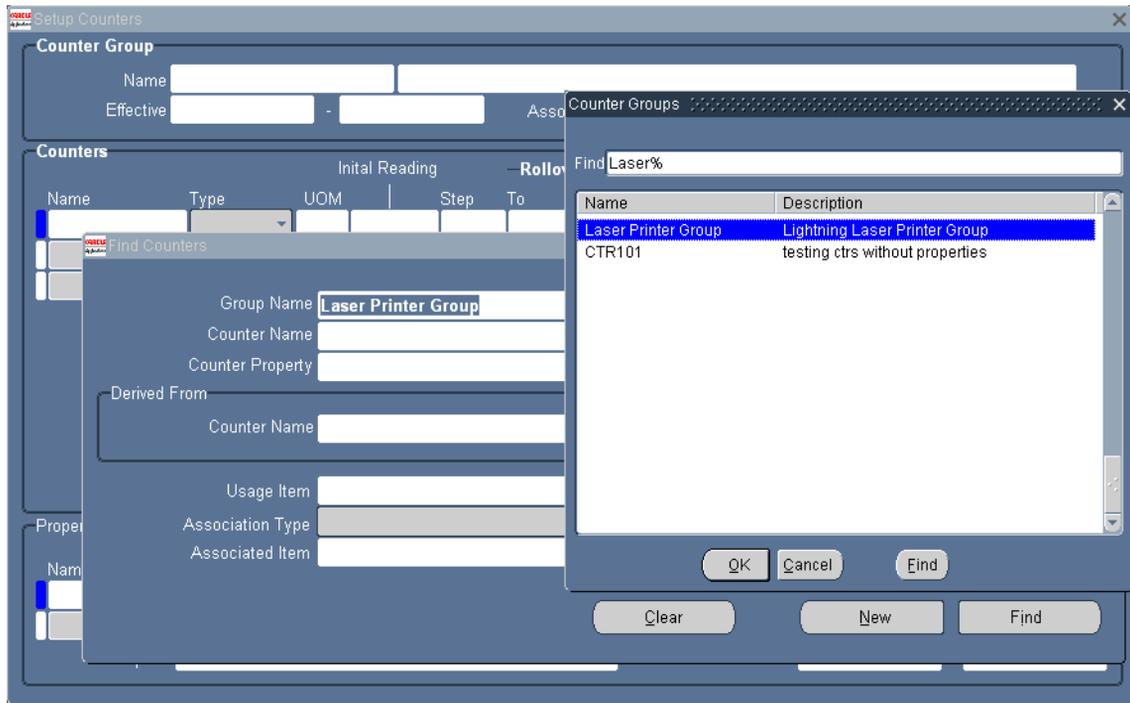
Prerequisites

None.

Steps

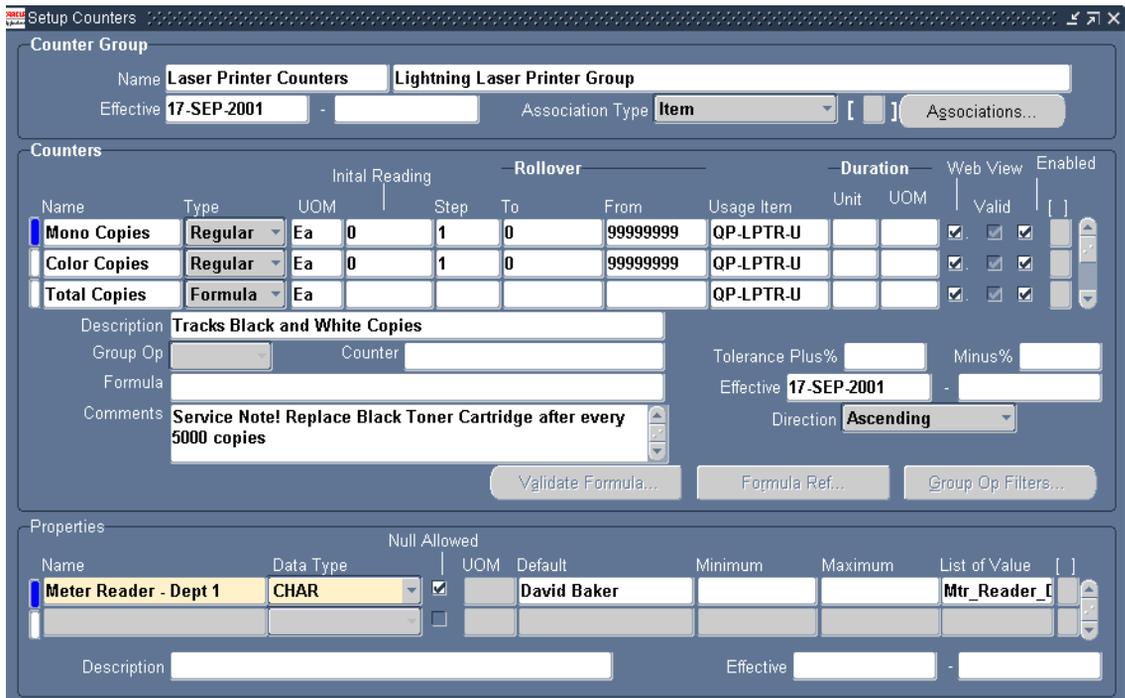
1. From the Navigator Menu list, double-click Service Request.
2. Double-click Setup from the Service Request submenu list.
3. Double-click Counters from the Setup submenu list.
4. Click Define Counters to launch the Find Counters window, and then click New.

Figure 10–5 Find Counters Window



5. Complete the Counter Group information.

Figure 10–6 The Setup Counters Window



6. Define the Counter Name and select Regular for Type.

7. Select the Unit of Measure (UOM) = Ea.

8. Enter the initial reading of the counter.

For example, a new automobile may have an initial reading on the odometer of 000022 miles accrued during testing and delivery.

9. Enter the counter step number.

For example, if you want the counter to be incremented by one for each reading, then enter 1 for the Step.

10. Enter the rollover to and from counter numbers.

For example, a counter on an automobile may start at 000000 and count up to 999999 before it rolls over to 000000 or if reset, starts with the Rollover To count of 000000.

11. Select a Usage Item from the LOV.
12. Confirm that the Web View checkbox is selected allow the counter to be viewed from the its HTML page from the iSupport window.
13. Confirm that the Enabled checkbox is selected to enable counter updates.
14. Identify a counter description or comments in the provided fields.
15. Select an effective start and end date from the Calendar LOV. Do not select an end date if no expiration is required.
16. Select the counter direction from the Direction LOV.
17. Identify a tolerance percentage, both plus and minus.

For example, if a counter is used by Service Contracts, determine a range in which the counter needs to be updated.
18. In the lower region of Properties window, click the List of Values LOV button to display the drop-down list. Then select a property type to link to this counter.

For example, you can select a property type called Assigned Counter Resources, which contains a list of resource names assigned to perform monthly counter updates.
19. Click the Default LOV button to display the LOV list, and then select a value that you wish to use as a default in the Counter Capture window.
20. Type the name assigned to the counter property.
21. Select a Data Type of CHAR (Character).
22. Confirm that the Null Allowed checkbox is selected if a null condition is allowed.
23. Click UOM (Unit of Measure) LOV button to display a list. Select Ea.
24. Optionally, enter a description for the property type being defined.
25. Enter an effective start and end date to enable property type setup. Do not enter an end date if no expiration is required.
26. From the toolbar menu, click the Save icon to update and save the record.

10.9 Defining a Group Function Counter

Use this procedure to define counters of the type Group Function. With this type you can derive counters using SUM and COUNT. Group function counters can be used in formula counters.

Explanation of SUM and COUNT

SUM totals all reading history for a counter and provides an accumulated total of the counter readings. COUNT counts the total number of readings that have occurred prior to resetting a counter. For example, consider a counter that had three readings and was reset after each reading. If the three readings are 100, 100, 100, then SUM returns 300, and COUNT returns 3.

Prerequisites

None.

Steps

1. From the Navigator, double-click Service Request.
2. Double-click Setup from the Service Request submenu.
3. Double-click Counters from the Setup submenu.
4. Click Define Counters to launch the Counters Find window. Then click New to launch the Counters Setup window.
5. Complete the information in the Counter Group region.
6. Define the counter name and select Group Function for Type.
7. Select a UOM (Unit of Measure). Example: Ea. (Each)
8. Select the usage item for this counter.
9. Identify counter description and effective dates.
10. Select the Group Operation of either SUM or COUNT.
11. Identify the Tolerance Plus and Minus % for the counter.

Tolerance is used by Oracle Service Contracts Events to determine the range within which these counters must be updated.
12. Enter any additional comments desired.
13. Click Group Operation Filter to launch the Counter Filter window.

14. Complete the counter filter information for the properties.
15. From the toolbar menu, click the Save icon to update and save the record.

10.10 Defining a Formula Counter

Use this procedure to define a counter of the type Formula. With formula counters you can use simple or complex mathematical formulas to derive a new counter value. This procedure is stated in the context of a specific business case and example steps that include regular counters.

Business Case

A service provider sells and leases laser printers and wants to track the copy usage for each printer residing in his Install Base. The service provider creates a counter group with individual counters to track the usage for each product to determine how often to perform his PM service tasks, and also to determine how often to ship out consumables such as toner kits and paper.

Example Task

Create a counter group that contains three counters to track usage for these printers. One of these counters is a formula counter. Complete the following steps:

High-Level Steps

1. Create a counter group with the name Laser Printer Group.
2. Define a regular counter with the name MonoCopies.
3. Define a regular counter with the name ColorCopies.
4. Define a formula counter with the name TotalCopies.

Prerequisites

None.

Step

1. From the Navigator Menu, double-click Service Request.
2. Double-click Setup from the Service Request submenu list.
3. Double-click Counters from the Setup submenu list.

4. Click Define Counters to launch the Counters Find window, and then click New.
5. Complete the Counter Group information described in the example.
6. Create two regular counters, one called MonoCopies, and one called ColorCopies. See [Defining a Regular Counter](#) for more information.
7. Create a third counter called TotalCopies, and then select Counter Type > Formula.
8. Select Ea for the UOM (Unit of Measure).
9. Select the usage item for this counter.
10. Identify an additional counter description and select the start and end dates from the LOV Calendar. Leave the End Date field blank if no expiration is required.
11. Enter the formula that you wish to use for the counter. The syntax is any valid expression in standard SQL. Use your own formula reference names preceded by the ':' symbol.

To create a formula that adds MonoCopies to Color Copies to derive a new total called TotalCopies, enter the formula as follows:

```
:MonoCopies+:ColorCopies
```

You must enter a colon [:] in front of a counter name with no spaces between any of the names and math symbols

Figure 10–7 Setup Counters Window for a Formula Counter

Counter Group

Name: Laser Printer Counters Lightning Laser Printer Group

Effective: 17-SEP-2001 Association Type: Item

Counters

Name	Type	UOM	Initial Reading	Step	Rollover To	From	Usage Item	Unit	UOM	Valid	Web View	Enabled
Mono Copies	Regular	Ea	0	1	0	99999999	QP-LPTR-U			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Color Copies	Regular	Ea	0	1	0	99999999	QP-LPTR-U			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Copies	Formula	Ea					QP-LPTR-U			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Description: Calculates the total number of copies

Group Op: Counter

Formula: :Mono Copies + :Color Copies

Comments: The formula counter calculates the total copy count

Tolerance Plus%: Minus%:

Effective: 17-SEP-2001

Direction:

Validate Formula... Formula Ref... Group Op Filters...

Properties

Name	Data Type	Null Allowed	UOM	Default	Minimum	Maximum	List of Value
	NUMBER	<input checked="" type="checkbox"/>					
		<input type="checkbox"/>					

Description: Effective: 17-SEP-2001

12. Click Validate Formula to validate the newly entered formula. If the formula is correct, the following message appears: Formula is Valid.
13. In the event of an error, check that each regular counter name used in the formula is spelled correctly, a colon [:] is displayed before each counter name, and all spaces are eliminated in the formula statement.
14. Enter the % Plus and Minus Tolerance. For example: Plus%: 10, Minus%: 10. Tolerance is used by Oracle Service Contracts Events to determine the range in which the counter should be updated.
15. Enter any desired comments into the Comment field.
16. Click Formula Reference to launch the Formula Reference window.
17. Select a reading type of Current or Delta for the regular counter being defined in the formula counter.

18. Optionally, select a counter name from the LOV to map to the formula reference name for each of the counters.
19. Optionally, select an item from the LOV to map the formula reference name for each of the Counters.
20. Click OK to update and close the Formula Reference window.
21. From the toolbar, click the Save icon to update and save the record.

10.11 Defining a Time-Based Counter

A time-based counter can be defined in hours, days, weeks, months, or years to keep track of events that occur in time. Time-based counters can be used to track such events as a contract expiration or preventive maintenance service that is due on a customer product. Time-based counters must be updated periodically by running a concurrent program called Time Based Counters Engine to increment each counter and automatically expire a counter that has past its expiration date.

Prerequisites

None

Steps

1. From the Navigator, double-click Service Request.
2. Double-click Setup from the Service Request submenu.
3. Double-click Counters from the Setup submenu.
4. Click Define Counters to launch the Counters Find window. Then click New to launch the Counters Setup window.
5. Complete the information in the Counter Group region.
6. Create a counter of type Time Based.
7. Select the unit of measure (UOM). The selected UOM should be for a measure of a unit of time such as Hours, Days, and Weeks.
8. Select the Usage Item for this counter.
9. Identify counter description, effective dates, and comments. there are no properties for time-based counters.
10. From the toolbar menu, click the Save icon to update and save the counter record.

10.12 Defining Miscellaneous Reading Types Lookups

The Counters Misc. Reading Types Lookups window is used to define a list of values for miscellaneous reading types that can be selected from the Counter Capture window. A miscellaneous counter reading may be required from time to time to identify a non-standard event or circumstance that occurred or was related to the specific product or service that was performed. For example, a miscellaneous reading might be used to display a copy usage total that was expended by the service technician during his service visit to the customer's site, and used to adjust the customer's monthly bill.

Business Case

A service technician performs a routine PM service on a customer's photocopier machine.

Example Task

As part of his service routine, the technician logs the copy count when he arrives then starts his PM. During the testing and calibration of the equipment, the technician expends twenty five (25) copies to achieve optimum machine performance. Upon completing the PM, the technician records the new counter readings on his service report as follows:

- Total Copies = 1,176
- PM Service Counter = 25

The total copies of 1,176 is entered on his service debrief, and the miscellaneous 25 service copies are entered into the Misc. Reading field with a value called PM Service Counter.

Note that the PM service counter will be adjusted from the total copies by the provider's accounting department, thus only billing the customer for his total usage on his next invoice.

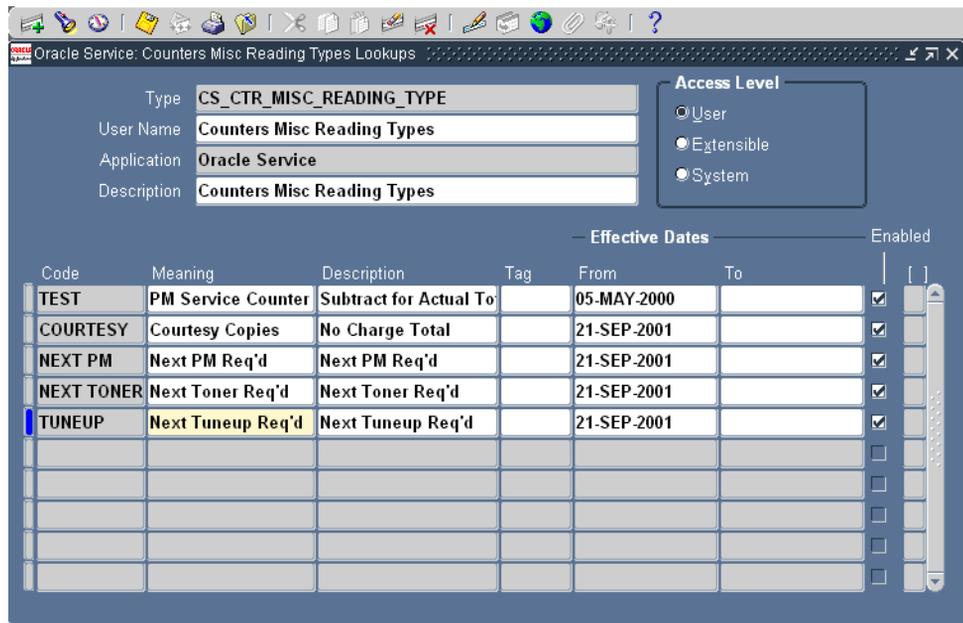
Prerequisites

None.

Steps

1. Navigate Service Request > Setup > Counters > Define Misc. Reading Types.

Figure 10–8 Counters Misc Reading Types Lookups Window



2. Identify the code, meaning, and description for a miscellaneous reading type. Establish the effective start and end dates. For example, to define adjustment as a miscellaneous type, enter the following:
 - a. Enter a Code: `Test Copies`.
 - b. Enter a Meaning: `Service Test`.
 - c. Enter a Description: `Test Copies by Serviceman`.
 - d. Leave the Tag field blank.
 - e. Select a from date: `05-Sept-2001`.
 - f. Select a to (end) date. Leave this blank if no expiration occurs.
 - g. Confirm that the Enabled checkbox is selected.
3. Repeat Step 2a through 2g for each for each miscellaneous reading that you wish to add. Choose a different meaning for each code to avoid any duplication errors.
4. From the top toolbar menu, click the Save icon to update and save the record.

10.13 Setting the Time Based Counters Engine

The Time Based Counters Engine concurrent program must be set to run periodically to advance and update all active time-based counters and to expire those counters that have expired their effective end dates.

10.14 Setting Profile Options

Counters has two profile options:

CS: Counter Webview Allowed? has a value of Yes or No. Set the option to Yes if you wish to enable counter views from iSupport.

CTR: Inactive Item Statuses can be populated with an item status selected from the profile LOV. Items with this status are excluded from the list of items available for association in the counters Associations window.

10.15 Automatic Instantiation of Counters

Counters provides an automatic instantiation process when a newly defined counter group or counter is associated with a BOM (Bill of Material), Item, or Service. Consequently each time a new capture is performed, the application automatically creates an instance, updating the Install Base and Service Contract records with the latest readings.

10.16 Viewing and Capturing Readings from iSupport

Oracle Counters offers API User Hook packages that permit public and private counter captures through the iSupport Install Base HTML page. See *iSupport* and Install Base guides or online help for more information.

Figure 10–9 Install Base HTML Counters Page

ORACLE
Oracle Installed Base

Sign Out Help

Products

Quick Find Product Number Go [Advanced Search](#)

Product Details
Product Number: 37928
Item Number: QP-LPTR-103
Item Description: Lightning Laser Printer

Counters

Reading

Counter Name	Counter Type	UOM	Current Reading	New Reading	Net Reading
Total Copies	Regular	Ea	1254	<input type="text" value="1967"/>	<input type="text" value="236"/>

Adjustment

Counter Name	Adjustment Type	Adjustment Amount
Service Copies	Misc. Reading	<input type="text" value="25"/>

Reset

Counter Name	Reset	Reading Before Reset	Reading After Reset	Reset Comment
Product Based	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

10.17 Capturing Counter Readings

The Capture Counter Reading window is used to update a new counter reading for a product, service, or contract line that is associated with a counter group or counters. The window is accessible from the toolbar of Depot Repair, Field Service, Customer Care, Customer Support, and Service Contracts. Use this procedure to capture a reading.

Figure 10–10 Capture Counter Reading Window

The screenshot shows the 'Capture Counter Reading' window for a specific product (10766:WR23763). It is divided into three main sections: Counter Group, Counters, and Counter Properties.

Counter Group: Name: Counter Group, Group Based Counter.

Counters: A table listing counters with their current and new readings.

Name	Type	Reading Date	UOM	Step	Reading			Usage	Valid Flag
					Current	Up	Down		
Color Copies	REGULAR		Ea		762	↑	↓		✓
Counter Based	REGULAR		Ea			↑	↓		✓
Mono Copies	REGULAR	17-JUL-2002 12:05:00	Ea		1789	↑	↓	1800 11	✓ 1775

Below the table, there are fields for Description, Misc Type (Test count), Misc Reading (25), Initial Reading, Counter Reset (checkbox), Last Reading Before Reset, First Reading After Reset, and Reason.

Counter Properties: A table listing properties for the counter.

Name	UOM	Null Allowed		Default Value	Value
		Data Type	Value		
Jamie Roberts	Ea	✓	CHAR	Depot Tech	CS_CTRL1

Buttons at the bottom include 'View Reading History', 'OK', and 'Cancel'.

Prerequisites

Counters must be associated with a product, service, or contract line in order to access the Capture Counter Reading window to perform updates.

Steps

1. From the toolbar of the calling application, choose Tools > Counter Capture. The Capture Counter Reading window appears.
2. Enter the new reading for each defined counter into the New field.
3. From the toolbar, click the Save icon to update and save the record.

Associating a Counter Property Value

4. Enter the name of the person performing the counter reading update.
5. Click the Value LOV button to display the list of property types.
6. Select a property type from the list. Example: CS_CTRL1.

7. Click the Default Value LOV button to display the drop down list.
8. Select a property value from the list. Example: Depot Tech.
9. From the toolbar, click the Save icon to update and save the record.

10.18 Using Miscellaneous Counter Readings

Follow this procedure to use miscellaneous counter readings.

Prerequisites

Confirm that miscellaneous reading types are defined in the Misc. Reading Types Lookups window.

Steps

1. Navigate to the top Toolbar, click on Tools to display the menu.
2. Select Capture Counter Readings to launch the window.
3. Navigate the mouse pointer to the Misc. Type LOV to display its list.
4. Select a value from the list. Example: Service Copies.
5. Enter the count in the Misc. Reading field.
6. From the toolbar, click the Save icon to update and save the record.

10.19 Instantiating Counters from a Template

The Counters application permits manual instantiation of counters for an Install Base product, service, or service contract line using APIs to execute the manual instantiation process. For more information about this topic, consult the guides for the application using the Counters application. Use this procedure to instantiate a counter from a template.

Prerequisites

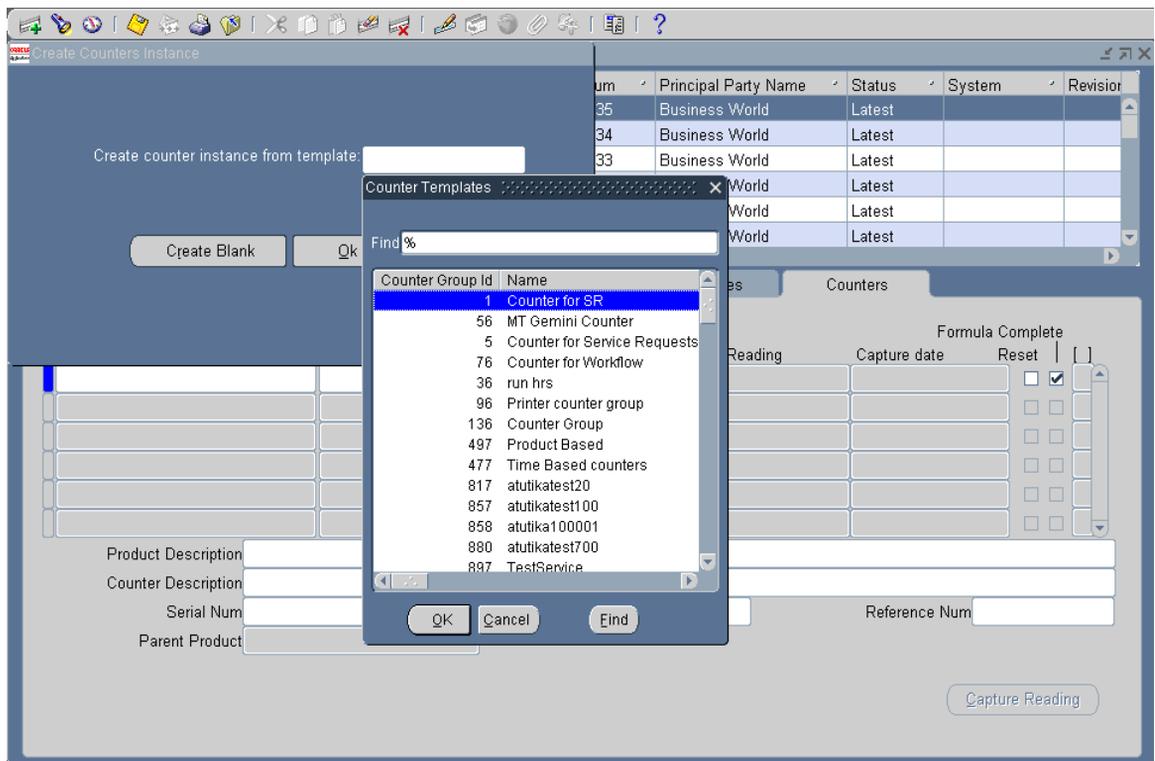
Confirm setup of Counter Groups/ Counter templates before attempting to use this functionality.

Steps

1. Navigate Install Base > View Customer Products.
The Find Products window appears.

2. Enter the customer's account number and/or product.
3. Click Find to start the query and launch the Install Base Product Summary/Details window.
4. Select a product from the Products table by focusing the mouse pointer on the item that you want to display on the tabbed pages.
5. Click the Counters tab to display its page.

Figure 10–11 Windows from the Install Base Product Summary Window



6. From the toolbar, choose Tools > Counters Setup.
7. Click Counters Setup to launch the Create Counters Instance window.
8. Click Create Counter Instance from the Template LOV button to display the Counter Templates find window.

9. Click the Counter Group ID or Name to select an entry, and click OK to populate the selection.
10. Click OK on the Create Counters Instance window to start the query.
The Setup Counters window launches with the template details populated.
11. Confirm setup details and effective start date to activate the counter group and counters being used for the selected product or service.
12. From the toolbar, click the Save icon to update and save the record.
13. Close the Setup Counters window by clicking on the X located in the top right hand corner of the window to return to the Install Base Product and Summary window.
14. Confirm that counters were instantiated for the selected Install Base product or service.

10.20 Resetting a Counter Instance

Use the following procedure to reset a counter from the Capture Counter window.

Prerequisites

A counter group with a counter type of Regular must be set up and instantiated.

Steps

1. Navigate to the Capture Counter window.
2. Click in the row that contains the counter that you wish to reset.
3. Enter the new value.
4. Optionally enter a miscellaneous type.
5. If you entered miscellaneous type, then enter a miscellaneous reading.
6. Select the Counter Reset checkbox.
7. Enter a value for Last Reading After Reset. This is a mandatory field for resets.
8. Enter the First Reading After Reset.

Default values from the counter setup definition for Rollover To are used to populate the First Reading After Reset field. If no values default, you must manually enter the First Reading After Reset value. This is a mandatory field for resets. The net reading is calculated as follows: $\text{Net} = \text{New reading} - \text{Current}$

reading - Misc. Reading + Last Reading After Reset - First Reading After Reset. See Implementing Counters, Defining Regular Counters for more information on Rollover To setup.

9. Enter the reason the counter is being reset. This is a text field and can capture the readers comments on the reset.
10. From the toolbar menu, click the Save icon to update and save the record.

10.21 Modifying Existing Counter Templates

A counter group and counter can be modified even if the counter has been instantiated. Use this procedure to modify all counters in a counter group.

Prerequisites

Check usage before attempting to modify an existing counter template to prevent any unforeseen errors that could occur after making these changes.

Steps

1. Navigate Service Request > Setup > Counters > Define Counters.
The Counter's find window appears.
2. Select a counter group or counter from the LOV and click Find to start the query.
The Setup window appears and is populated with the details.
3. Modify the items that you wish to change.
4. Click the Save icon to update and save the record.

Guidelines

To modify a single existing counter instance, select the product or service associated with the counter that you want to modify then select Counter Setup from the Tools menu to launch the Counters window.

