Oracle® Install Base

User Guide

Release 11*i*

Part No. B10683-01

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This guide covers Oracle Install Base and an associated application, Counters.

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Oracle Install Base User Guide, Release 11*i*

Part No. B10683-01

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Oracle Install Base User Guide, Release 11*i*

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You can send comments to us by electronic mail to mfgdoccomments_us@us.oracle.com. Please include your product name in the subject line: Attn: Oracle Install Base.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

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

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

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

  If you have never used Oracle Install Base, Oracle suggests you attend one or more of the Oracle Install Base training classes available through Oracle University.
- The Oracle Applications graphical user interface.

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

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

Documentation Accessibility

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

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How To Use This Guide

This document contains the information you need to understand and use Oracle Install Base and an associated application, 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 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 7 describes the window where you can reprocess transactions that failed to update Oracle Install Base from certain ERP sources.
- Chapter 8 describes the window where you can schedule several changes to be made to a group of instances.

- Chapter 9 describes an open interface feature to mass load item instances. This feature can be used to create new item instances or update existing ones.
- 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 Oracle*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 User Guide

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

Oracle TeleService User Guide

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 Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your

installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

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

Multiple Organizations in Oracle Applications

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

Oracle Workflow Guide

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Manufacturing APIs and Open Interfaces Manual

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

Oracle Order Management Suite APIs and Open Interfaces Manual

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

Oracle Applications Message Reference Manual

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

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

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

Support

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

Oracle*MetaLink*

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

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

1

Overview of Oracle Install Base

This topic group includes the following topics:

- Definition of Oracle Install Base
- Features of Oracle Install Base

1.1 Definition of Oracle Install Base

Oracle Install Base is an item instance life cycle tracking application that facilitates enterprise-wide life cycle item management and tracking capability. Oracle Install Base tracks an item from the time that it is received in inventory, in work in process, in projects, at customer sites, and throughout the return and repair process. It records a history of changes to tracked items and supports the creation and maintenance of Oracle Install Base configurations.

Oracle Install Base is a centralized repository of information for an item instance and its tracking details including location, status, ownership, party, account and contact relationships, configuration data, and the change history of customer products or corporate assets. The application includes drill-down capability to obtain details of inventory, work in process, and order management transactions affecting an item's tracking attributes.

Additionally, Oracle Install Base provides links to detailed information from contracts, service requests, repair orders initiated for an item instance, and counters associated with the item instance.

Note: Oracle Install Base support is subject to rules, conditions, and limitations discussed in various sections of this guide. These are not exhaustive. Although most situations are covered, it is not possible to specify all rules, conditions, and limitations with regard to the functionality of the application.

1.2 Features of Oracle Install Base

1.2.1 Functional Overview

Oracle Install Base is capable of tracking serialized and non-serialized item instances including:

- Tangible products such as manufactured, purchased, and shipped items
- Intangible products such as software, services, licenses, and agreements
- Tangible assets including fixed, movable, and leased assets

Oracle Install Base leverages existing Oracle applications and is fully integrated with the Oracle E-Business Suite.

Key features and functionality include the following:

- Item instance maintenance
- Support for inventory transactions
- Centralized repository of information:
  - Item instance consolidated transactions history
  - Item instance timestamp and version label history
  - History of Oracle E-Business Suite transactions affecting Oracle Install Base
- Instance relationships with multiple party/accounts
- Configuration support and instance-to-instance relationships
- Open Interface and Quick Edit capabilities:
  - Mass load of item instances by an open interface
  - Quick online edit of attributes for a group of item instances
- System grouping of item instances

- Capability of user-defined extended attributes

1.2.2 Overview of Features

Oracle Install Base features robust, flexible HTML user interfaces and provides a wide range of query, search, and edit capabilities.

The user interfaces feature the ability to:

- Obtain at a glance the key attributes related to ownership, location, and relationships for an item instance
- Provide a consolidated history of transactions affecting Oracle Install Base instances as well as the state of key attributes at a given point in time
- Query the inventory of available assets and items trackable through Oracle Install Base
- Extract and present transactional information across Oracle E-Business Suite applications as they relate to Item instances
- Present configurations of they currently exist as well as the unique capability of illustrating historical' configurations, that is, the configuration as it appeared in previous versions
- Ability to manually create and edit item instances
- Ability to manually create and change item configurations

The ability to create and update item instances and configurations is also available by the Open Interface functionality and Forms including quick mass edit capabilities.

1.2.3 Instance Maintenance

Oracle Install Base provides for creation, updating, querying, and copying of instances through Oracle Install Base user interfaces and through integration with other applications. These include Oracle applications such as Oracle Service Contracts, Oracle Field Service, Oracle Depot Repair, complex maintenance repair and overhaul, receiving, WIP, Oracle Inventory, Oracle Projects, Oracle Order Management, and shipping. Asset creation and maintenance can be invoked using Oracle Enterprise Install Base.

It provides tracking of location, status, addresses, contacts, business party relationships, inter-instance relationships, extended pricing, instance attributes, and a host of other item instance attributes.

Instance maintenance can be directly performed using robust HTML query, search, and edit capabilities.

1.2.3.1 Support for Inventory Transactions

Oracle Install Base supports creation and update of item instances and attributes for transactions originating in Oracle Inventory. These include internal transactions such as internal order shipments and subinventory transfers, discrete manufacturing transactions such as WIP component issue and WIP component return, and external transactions such as sales order shipments to external customers.

The *Oracle Install Base Implementation Guide* provides a comprehensive list of Oracle Inventory transactions that Oracle Install Base supports.

1.2.3.2 Centralized Repository of Information

Here are examples of information that you can find in the centralized repository that is Oracle Install Base:

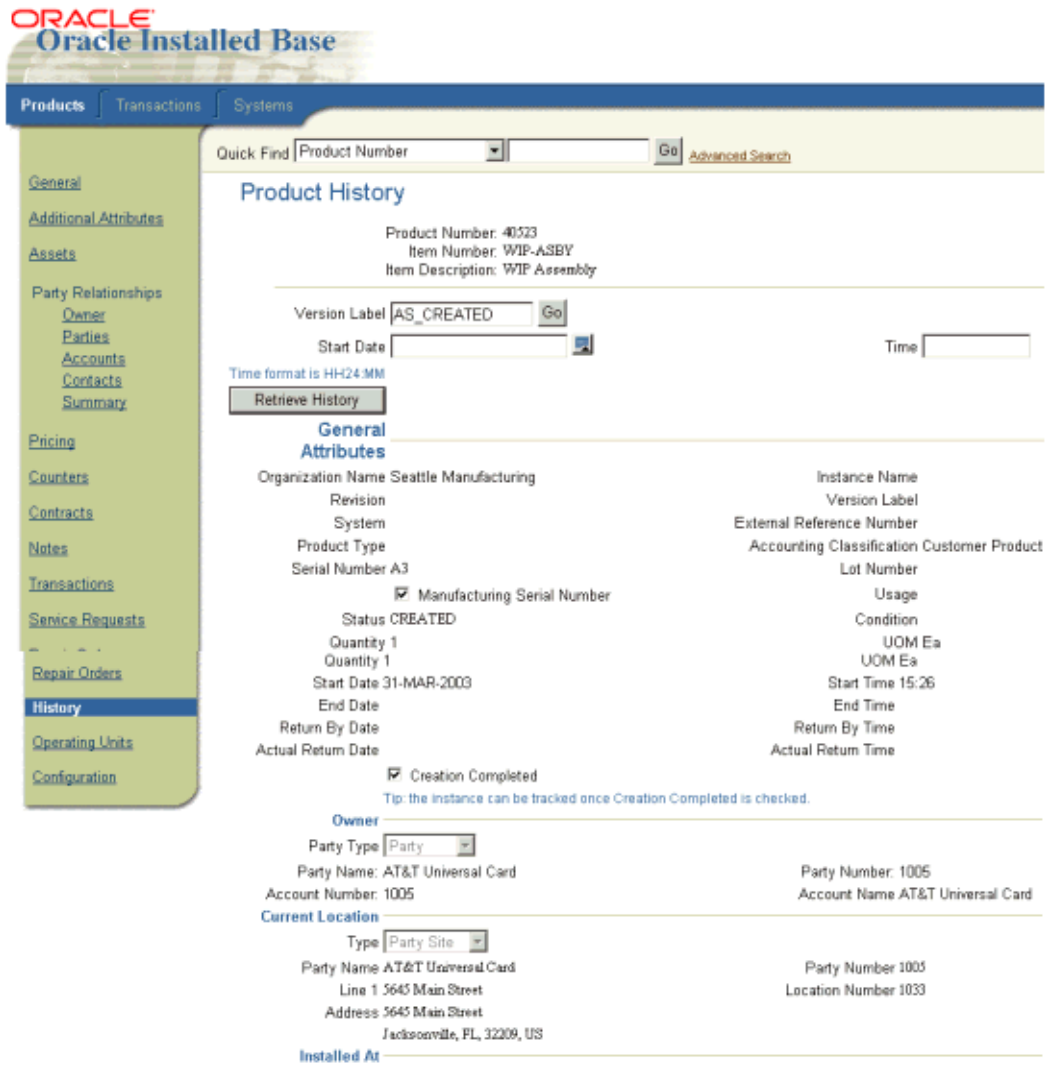
- Consolidated transactions history for an item instance

  Oracle Install Base provides a single, centralized user interface to view and drill down from all transactions affecting tracking attributes for an item over the life of the item instance. Transaction details include, for example, transaction type, source application, transaction, line reference, and transaction date.

- Timestamp and version label history for an item instance.

  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. This feature provides valuable information regarding what an item instance looked like at a given point in time. An example of versions label, timestamp history is illustrated in the figure below.

Figure 1–1 State of Attributes for an Item Instance at a Point in Time

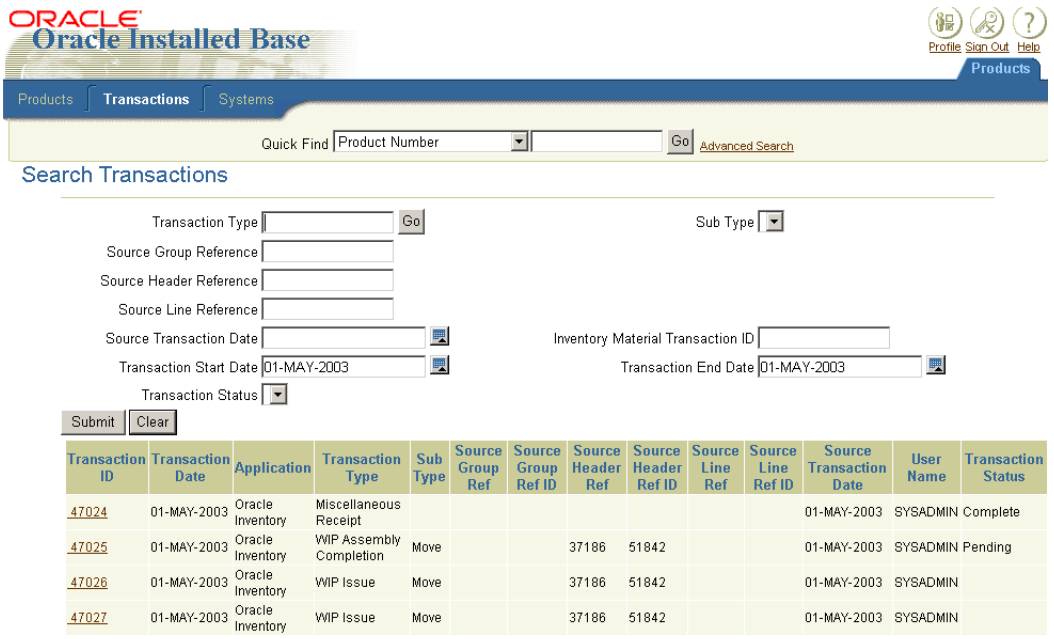


- History of Oracle E-Business Suite transactions affecting Oracle Install Base

  Oracle Install Base provides the ability to query transactions by date range, status, and transaction types across Oracle E-Business Suite applications. It

pulls together information from multiple applications and presents it in a single, central user interface as illustrated below.

Figure 1–2 History of Transactions



1.2.4 Multiple Party/Account Relationships

With Oracle Install Base you can relate an item instance to multiple entities called parties. The parties can be different party types. Thus an item instance may have been Sold To party A but is now Owned By party B. It may be Shipped To party C, and so on. The entities may have type values such as Party, Vendor, Employee. 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 required by today's business globalization and outsourcing requirements.

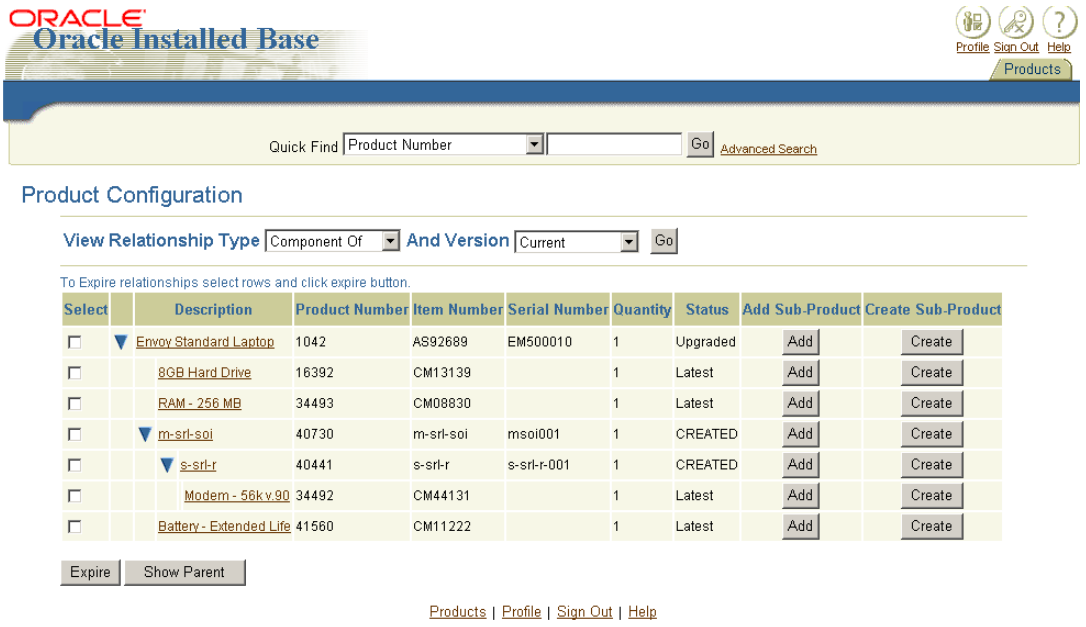
1.2.5 Configuration Support and Instance-to-Instance Relationships

Oracle Install Base provides the ability to store configurations of item instances and to access the history of a configuration.

This functionality includes creating and maintaining configurations. It builds hierarchical configurations at WIP assembly completion by formulating Component-Of relationships between instances. It supports parent-child bill of material (BOM) structure at the point of sales order shipment.

An example of a component-of configuration is provided in the figure below.

Figure 1–3 Example of a Component-Of Configuration



Multiple types of relationships between instances are supported. For example, Oracle Install Base connects two or more components in a communications network by creating Connected-To relationships between item instances. This capability reflects Oracle Install Base integration with the Telecommunications Service Ordering solution of Oracle Configurator.

1.2.6 Open Interface Mass Load and Quick Edit Capabilities

Oracle Install Base provides the Open Interface feature to mass load item instances. This is useful during initial conversion and for synchronizing multiple environments. It can be used to create new instances or to update existing item instances. It can also be used to create or update relationships between item instances including replacing instances in Component-Of configurations.

Additionally, Oracle Install Base provides the handy, out-of-the-box Mass Edit feature. With this feature you can select a group of item instances based on a set of search criteria and invoke attribute changes for all item instances in the group. For example, you can quickly and conveniently change ownership, location or contacts for a group of instances. The transactions can also be set to run on a future date.

1.2.7 System Grouping of Item Instances

Oracle Install Base has the ability to group item instances under a construct called a system. For example, all copier machines on the fifth floor of a building or those belonging to a specific department can be grouped under a system. You can define, view, and invoke specific changes to item instances within the system, or grouping. Additionally, you can build hierarchies of systems and link multiple systems in parent - child hierarchies or relationships.

1.2.8 Extended Attributes

Oracle Install Base offers the flexibility of multi-level, user definable additional, or extended, attributes associated with an item instance to fit a variety of business requirements. The application also stores pricing attributes for an item instance and makes them available for subsequent use by Oracle E-Business Suite applications including Oracle Service Contracts. That application uses service programs or extended warranties where price is dependent on the attributes of a product.

1.2.9 Life Cycle Tracking in Oracle Install Base

Oracle Install Base instances of trackable, shippable items are created when an item is received into inventory, through miscellaneous receipt, purchase order receipt, WIP assembly completion, 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 Oracle Install Base interface process to update Oracle 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, Oracle will be captured and reflected in Oracle Install Base through the SFM queue and the Oracle 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 Oracle Install Base.

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

At the time of creation of a sales order line, the Oracle 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 update the Oracle Install Base instance when it is accessed.

After an item has left an organization, for example, following sales order shipment and installation at a customer site, Oracle Install Base continues to track changes to the instance as part of its life cycle tracking functionality.

The instance can be updated directly by a customer through web-based access or by an agent of the deploying organization. Changes may be effected manually by individual instance update or by mass edit, or by the Oracle Install Base Open Interface feature. Oracle Install Base continues to track the item through the course of its life including the return, repair, upgrade, and reshipment process. This key feature is based on the Oracle Install Base ability to separate item location from item ownership.

The following process flow illustrates Oracle Install Base life-cycle tracking capability:

Receiving & Inventory > Manufacturing or Depot Repair > Shipping & Distribution > Contracts > Customer Service > Field Service. Customer Service > Receiving & Inventory by an RMA or Returns.

1.2.10 Sales Order Shipment, Fulfillment, and RMA Receipt Interface

The Order Management to Install 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 Oracle Install Base.

A sales order shipment generates an Inventory Issue material transaction in the Oracle Inventory application. Because Oracle Install Base also tracks the internal inventory for trackable items, the instance already exists in Oracle Install Base. A shipment can result in a change in instance location and ownership, status, and so on, based on the associated Oracle Install Base sub-transaction type.

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

2. Fulfilled Order Lines (non-shippable items)

   Oracle Install Base tracking of non-shippable items at fulfillment requires workflow customization as defined in the *Oracle Install Base Implementation Guide*.

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

   The Oracle Install Base interface processes additional data entered in the Transaction Details window from the Oracle Order Management Sales Order Lines window.

   Oracle Install Base also supports the Oracle Order Management RMA fulfillment process for non-shippable items subject to rules and conditions defined in the *Oracle Install Base Implementation Guide*.

1.2.11 Inventory Interface

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

- Inventory transfer or move order transfer
  - Serialized items (Predefined or At-Receipt)

The location of an instance is updated to reflect the new location of a serialized item.

- Non-serialized items

  Item instance quantities are updated: The quantity of the instance at the From location is reduced, and the quantity of the instance at the To location is increased by the quantity being moved.

- Items issued to a WIP job

  The location of the item reflects the WIP job number.

- Internal order transfer

  The location of the item reflects the internal sales order.

- Item issued to an asset

  The location of the item reflects the asset number.

- Item issued to projects or tasks

  The location of the item reflects the project or task number.

  For further details regarding assets, projects, and tasks, refer to Oracle Enterprise Install Base documentation.

Oracle Install Base also tracks the movement of items within an organization. The application supports internal sales orders and inter-organization transfers and appropriately updates location and other attributes as an item instance is transferred between warehouses, divisions and other parts of an organization.

1.2.12 WIP Interface

WIP assembly completion results in an inventory receipt in the Oracle Inventory application. The Oracle Install Base interface creates an instance for the serialized top assembly and builds a component-of configuration of trackable components issued to the WIP job.

Component-of configurations are created or updated in the following areas:

- WIP assembly completion

  This is restricted to top assemblies that are serialized at receipt

- Post WIP completion transactions

Components are added or removed from existing configurations for WIP completion transactions including WIP component issue/return and WIP negative component issue/return.

- Work order-less WIP completion transactions

  A component-of configuration is created at work order-less WIP completion based on component transactions.

At sales order shipment, the ownership and location of the assembly and its components are appropriately updated based on selected Oracle Install Base sub-transaction types.

Oracle Install Base supports single level WIP non-standard jobs used in the return and repair scenario. For example, a laptop (configuration) with a failed component (hard drive) is returned to the enterprise using an RMA transaction. The laptop is repaired (component is removed and replaced) and returned to the customer. Oracle Install Base records and maintains this series of events subject to specific rules and conditions. For further details, review the Product Configuration Page section in this guide. Each stage of the process is represented in Oracle Install Base by changes or updates of location, instance status, usage, and other attribute changes.

1.2.13 Other Features

Here are some other features of Oracle Install Base:

- Optional support for RMA receipt, shipment, and miscellaneous receipt transactions irrespective of ownership

  For example, the application transfers ownership and processes an RMA even if the RMA customer is different from existing instance ownership. This functionality is based on the setting of the Install Parameters attribute Override Ownership.

- Support for the Oracle Telecommunications Service Ordering (TSO) solution

  Oracle Install Base integrates with the Oracle TSO network configuration solution and supports telecommunications configurations and service networks as defined below:

  - New Customer TSO flows

    This feature enables creation of network configurations. The standard business flow integrates several Oracle products as follows:

Oracle Quoting > Oracle Configurator > Oracle Order Management > SFM > Oracle Install Base

- Changes for existing customer installed service flows

  These are modifications and changes to existing customer network configurations. The supported functionality includes querying Oracle Install Base instances through Oracle Quoting followed by Oracle Configurator-based modifications to Oracle Install Base instances:

  Oracle Quoting > Oracle Configurator > Oracle Order Management > SFM > Oracle Install Base

- Manual on-line changes or updates to network configurations

  Oracle Install Base provides specific user interfaces to display and update TSO configuration item instances. It provides direct integration with Oracle Configurator and utilizes Oracle Configurator rules to validate changes made to these instances. The manual method bypasses the traditional Quoting–Configurator–Order Management–SFM–Install Base process and provides a direct mechanism to handle specific updates.

  Rule: Oracle Install Base support for Oracle Configurator TSO network models is restricted to non-shippable items.

- BOM sort order

  Oracle Install Base utilizes the BOM sort order from Oracle Configurator when displaying network (TSO) configurations.

- User-definable instance names

  Oracle Install Base provides user-definable instance names for ease of use in referencing TSO (configured) component instances.

- Project Contracts (shipment transactions)

  Oracle Install Base supports item shipments sourced by Oracle Project Contracts. It appropriately updates or creates item instances for products shipped from Oracle Project Contracts. Currently, the Transactions link in Oracle Install Base maintains the source reference to Oracle Project Contracts. Advance Search and Quick Find do not reference Oracle Project Contracts.

1.2.14 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*.

1.2.15 Integration with the Oracle E-Business Suite

Oracle Install Base has the following integration points within the Oracle E-Business Suite:

- Counters and Notes (update capabilities)
- Direct updates from Oracle Field Service and Oracle Complex Maintenance Repair, and Overhaul
- View and reference accessibility from multiple applications such as Oracle Contracts, Oracle Field Service, Oracle Depot Repair, and Oracle Customer Support
- Oracle Trading Community Architecture for querying parties and accounts and building item instance to party relationships
- Oracle Inventory (receiving and other inventory transactions)
- Oracle Order Management (shipping, fulfillment, and RMA receipts)
- Oracle Assets
- Oracle Projects
- Oracle Work in Process (move transactions, assembly completion, configuration support, and others)
- Oracle Project Contracts (shipment transactions).

2

Basics of Oracle Install Base

This topic group begins to tie general features and goals discussed in the Overview topic group to starting points in the actual user interface. The topic group also includes some directions that otherwise would have to be repeated frequently.

This topic group covers the following topics:

- Accessing Oracle Install Base in HTML
- The Products Tabbed Page
- Finding a Product with Quick Find
- Using the Go Button to Display a List of Values
- Accessing Oracle Install Base in Forms

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

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

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

2.2 The Products Tabbed Page

In the HTML mode of 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
- Open Interface

3

Using the Products Tabbed Page

3.1 Overview

Products are item instances that are being tracked. Oracle Install Base provides life-cycle tracking of such item instances. It provides the unique ability to query the inventory of available products, services, and assets tracked through Oracle Install Base. 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 Oracle Install Base many properties can be tied to the instance to facilitate its usability in other applications. An example is tracking the party relationships for a product. A product can be owned by one party but serviced by another. For each party, many accounts and contacts can be defined and stored. In addition, multiple configurations can he set up for an instance to track the relationships that are possible. This is especially useful in the telecommunication environment where, for example, a 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 Oracle 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 Oracle 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.

3.2 The Search Products Page

The Search Products page shows the following default 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 expiry with an end date of today, when you click Update. A list of values is displayed for update of status for the expired instance. Status choices include, for example, Returned, Terminated, and Return for Replacement.

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 Oracle 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.

View Details column

Provides a LOV containing links for direct access to details of product category attributes. The default value in the speed menu link is populated from the profile option CSI: UI Default Selection of View Details Dropdown.

3.3 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.

3.4 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.

3.5 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 Advanced Product Search page provides customizable, collapsible regions to suit user requirements. Therefore, what you see on this page depends on your local setup. Collapsible regions are set up by updating the following CSI lookup CSI_ADV_SEARCH_DEF_SHOW.

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

3.6 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 Oracle 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 are displayed for input. The manufacturing flag verifies the existence of the serial number in the ERP inventory organization. Oracle Install Base performs an additional check regardless of the manufacturing flag. It checks for the uniqueness of the serial number within Oracle Install Base based on the setup of a serial control uniqueness parameter in the inventory organization. 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.

Instance Name is an alternative method for referring to a specific instance or a group of item instances. For example, if you wish to refer to the specific instance of a network router located at 100 Main Street, then give this instance a name such as "Router-100 Main Street,Bos,Ma." Advanced Search functionality allows querying by Instance Name. The Oracle TSO network configuration-reconfiguration functionality utilizes this feature.

Similarly, External Reference is an alternative method for referencing one or more instances of an item. Advanced Search and Quick Find allow querying by External Reference. The Order Management Installation Details window supports entry of External Reference. This field is updateable for customer products through the Oracle Install Base HTML user interface.

The Condition field in the general attributes region is populated from the material status code from Oracle Inventory, such as New, Old, and Used. It indicates the condition of an item instance in the Oracle Warehouse Management application.

The Status field is derived from a user-extendible Instance Statuses list of values table required during setup of Oracle Install Base. It indicates the current status of the instance, for example, Created, Repaired, and Returned for Repair. The instance Status field is automatically updated for Oracle Order Management shipment transactions or RMAs. For these transactions, the Status field is derived from the corresponding Oracle Install Base transaction sub-types selected in the Installation Details window for Oracle Order Management transactions.

Oracle Install Base provides separate Current and Installed At location attributes. These accommodate situations where both are required. For example, an item instance installed at a customer location may have been returned for repair. In this case, the current location reflects an in-house inventory location whereas the installed location continues to reflect the installed-at customer site. 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.

At manual instance creation, you can utilize a checkbox called Same as Current Location. This provides a shortcut for populating the installed-at location to be the same as current location.

The owner party is the default in the Party field in the Location region, and the LOV of locations is that for 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.

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 a 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 Install Base 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 Details page appears for you to enter any additional information such as party and contact.

3.7 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.

3.8 Working with General Attributes

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

You can modify serial numbers only for manually created instances for which you did not select the Manufacturing Serial Number checkbox. The new serial number must not have existed in the system before.

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.

Instance Name is an alternative method for referring to a specific instance or a group of item instances. For example, if you wished to refer to the specific instance of a network router located at 100 Main Street, this instance may be given an instance name such as 'Router-100 Main Street, Bos, Ma'. Advanced Search functionality allows querying by Instance Name. The Oracle TSO solution's network configuration-reconfiguration functionality uses this feature.

Similarly, External Reference Number is an alternative method for referencing one or more instances of an item. Advanced Search and Quick Find functionality allow querying by External Reference Number. The Oracle Order Management Installation Details window also supports entry of External Reference Number. This field is updateable for customer products.

The Condition field is populated from the material status code from Oracle Inventory, such as New, Old, and Used. It indicates the condition of an item instance in the Oracle Warehouse Management application.

Status is derived from a user-extendible instance statuses list of values table required during set up of Oracle Install Base. It indicates the current status of the instance, for example, Created, Repaired, and Returned for Repair. The instance Status field is automatically updated for Oracle Order Management shipment transactions or RMAs. For these transactions, the Status field is derived from the corresponding Oracle Install Base transaction sub-types selected in the Installation Details window for Oracle Order Management transactions.

Oracle Install Base provides separate Current and Installed At location attributes. These accommodate situations where both are required. For example, an item instance installed at a customer location may have been returned for repair. In this case, the current location must reflect an in-house inventory location whereas the installed location must continue to reflect the installed at customer site. 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 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 Oracle 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 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."

Return-by date and time values are populated from transaction details and subsequently removed upon RMA receipt.

Actual return date and time are defaulted from Oracle Inventory receiving transactions and subsequently removed upon shipment.

Shipping date and time are populated from shipment transactions.

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.

3.9 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 Oracle 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 Oracle 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.

3.10 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 the *Oracle Enterprise Install Base User Guide* 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.

3.11 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. Team and Group party types can be marked as Primary or Preferred.

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 Oracle 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 preferred or primary. Preferred contacts are used when you select service personnel for task assignment.
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.

3.12 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 Oracle Order Management and Oracle Advanced Pricing.

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.

3.13 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 Oracle 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 Oracle 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.

3.14 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.

3.15 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.

3.16 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.

Definitions of selected columns on this page are listed in the following table.

Column	Definition
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.

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.

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.

3.17 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. Oracle 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, Oracle 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.

3.18 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.

The ownership transfer date can be set as a past or current date. If ownership transfer is backdated, then the application verifies that no Oracle Install Base transactions exist between past and current dates. If transactions exist, then the application raises an error, otherwise the transaction is saved and the transfer date is passed to Oracle Service Contracts for further processing.

If Install Parameter: Override Ownership is turned on, Oracle Install Base supports RMA receipt, shipment, and miscellaneous receipt transactions of Oracle Install Base instances regardless of ownership.

Oracle Install Base processes the RMA and transfers ownership if the RMA customer is different from existing instance ownership. Similarly, Oracle Install Base allows shipment of an instance to any party from inventory regardless of current external ownership of the item instance, that is, the party or owner responsible for returning the item.The application changes ownership to Internal for Miscellaneous receipt of a customer-owned item. This is applicable to serialized-at-receipt or predefined serialized items.

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 Oracle Accounts Receivable 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 Oracle 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, Oracle Install Base supplies Oracle Contracts with information about the change of ownership and the transfer date.

3.19 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 Oracle 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.

3.20 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.

3.21 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.

3.22 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 Oracle 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.

3.23 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.

Online configuration support is restricted to Component-Of and Connected-To instance-to-instance relationships.

For more information about Oracle Install Base support for configurations, refer to Oracle Install Base Configuration Support.

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 an new instance as a child of the instance from the configuration page.

Show Parent Button

Use this to view the parent of a configuration.

3.24 Oracle Install Base Configuration Support

Oracle Install Base provides the ability to create and manage configurations based on relationships between item instances. When an item is a component of an assembly, two instances are related in a Component-Of relationship. The resulting configuration can be viewed, changed, and terminated using Oracle Install Base.

Abbreviations used in this section are as follows:

- Bill of materials (BOM)
- Assemble to order (ASO)
- Pick to order (PTO)
- Work in process (WIP)

Oracle Install Base creates and supports Component-Of configurations in several ways:

- BOM-based configuration at sales order shipment
- ATO configuration at sales order shipment
- PTO and kit configurations at sales order shipment

- WIP assembly completion (including post-completion transactions)
- Oracle Install Base Open Interface transactions
- Manual configuration creation and update using Oracle Install Base HTML pages

BOM-Based Configuration at Sales Order Shipment

Configurations are created based on the profile option CSI: Explode BOM = Yes.

BOM explosion creates a multi-level configuration, or indented BOM, based on the profile option CSI: BOM Explosion Level. For example, if this profile value equals 5, then BOM is exploded up to five levels during the configuration build. The components must be marked Oracle Install Base trackable.

Rules and notes:

- BOM explosion is only created for Item instance Qty = 1.
- In the case of serialized components, item instances are created without serial numbers. The serial number field is available to a user for update. In this case, for future transactions such as RMA of item instances, the user must provide the serial number.

ATO Configuration at Sales Order shipment

A configuration is created for an ATO model, configured item, ATO option class, and components.

Rules and notes:

- An ATO model, configured item, ATO options, and components must be marked Oracle Install Base trackable.
- Non-shippable items, such as model and option classes, must be fulfilled in order to be represented in a configuration.

PTO Configuration at Sales Order Shipment

A configuration is created for a PTO model, included items, PTO option class, and components.

Rules and notes:

- A PTO model, included items, PTO option class, and components must be marked Oracle Install Base trackable.

- Non-shippable items, such as model and option classes, must be fulfilled in order to be represented in a configuration.

Kit Configuration at Sales Order Shipment

A configuration is created for a kit and components items.

Rules and notes:

- A kit and component items must be marked as Oracle Install Base trackable.

Configuration at WIP Assembly Completion and Allocation

For discrete jobs, configurations are created at WIP assembly completion based on two key parameters, Auto Allocate = Y and Genealogy enabled.

Configurations are created at assembly completion using work order-less WIP completions transactions.

Rules and notes:

- Configurations are only built for assemblies serialized at receipt.

  There is one exception to this rule: In a repair/upgrade scenario: If serial number A is issued to a job that upgrades the same item or serial number to a new serial number B, then the original serial number, A, is not created as a component of itself, the new serial number B.
- For Auto Allocate = Y and Genealogy not enabled, configurations are built based on job requirements.
- If Genealogy is enabled, configurations are built based on parent-child genealogy.
- Configuration support includes post-completion transactions. That is, components are added or removed from existing configurations following post-completion transactions. An example is WIP component issue or return and WIP negative component issue or return.

Oracle Install Base Open Interface Transactions

Oracle Install Base supports the creation and maintenance of Component-Of item instance relationships using Open Interface.

Manual Configuration Creation and Update Using HTML User Interface

For information on using the Oracle Install Base HTML UI to manually create and update configurations, refer to the Product Configuration Page section in this guide.

Product Configuration History and Version Labels

Oracle Install Base provides the unique capability of viewing configurations based on version label. Assume that you have three version labels for a product, a) As Created, b) As changed - mm/dd/yyyy, and c) Current. Also assume that the configuration was changed in the second and third cases. Using Oracle Install Base, you can derive and view what the configuration looked like based on version label attributes.

///Oracle Install Base is integrated with Oracle Order Management and facilitates replacement of item instances using Replaced-By and Replacement-For relationship types in the Installation Details page available in Sales Order pages.

These relationship types are view-only

3.25 Understanding Relationship Types

With Oracle 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.

The HTML pages of Oracle Install Base support the following relationship types:

- Component-Of
- Connected-To

The following relationship types are intended for future functionality and are currently not supported in HTML:

- 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.

For 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.

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

Currently this relationship type is utilized in the Oracle TSO solution for the telecommunications industry. The type is used to support network service configuration and reconfiguration and is integrated with Oracle Configurator in the context of the Oracle TSO solution. This is the only situation in which Oracle Install Base supports cyclical relationships.

3.26 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.

3.27 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 Oracle Inventory Item Master with the Install Base Trackable checkbox 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.

4

Using the Transactions Tabbed Page

This topic group includes the following topics:

4.1 Overview

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 Oracle 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 Implementation Guide*.

For each transaction type, subtypes can be defined to further specify the actions on one or more Oracle 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 Oracle Install Base Implementation Guide*.

For example, when an Order Management - Shipment transaction updates Oracle 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 Oracle 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.

4.2 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.

5

Using the Systems Tabbed Page

This topic group includes the following topics:

5.1 Overview

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.

5.2 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.

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

5.3 Personalizing 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 Personalize. The Advanced System Search 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.

5.4 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. An instance can be a part of only one system at a given time. 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, installation, and contact can be selected from the LOV from GO.

   The list of values available for parent system name is restricted to systems with the same or related party-accounts.

   To transfer a system, you can change the party name and associated party-account number. Changes can be cascaded to a system's child instances by selecting the associated Cascade Changes to Children checkboxes.

   Rule:

   If a system is terminated, then the profile option CSI: Cascade System Termination takes precedence over the Cascade Changes to Children checkboxes.

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, then click Restore to return values to their last saved state, and re-enter values.
5. Click Update to save your edits.

5.5 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, then it appears in the graphical display.

5.6 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.

6

Using the Transaction Details Window

In the Transaction Details window you can update Oracle 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

6.1 Accessing the Transaction Details Window

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

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

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

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

6. Click Actions.

   The Actions window appears.

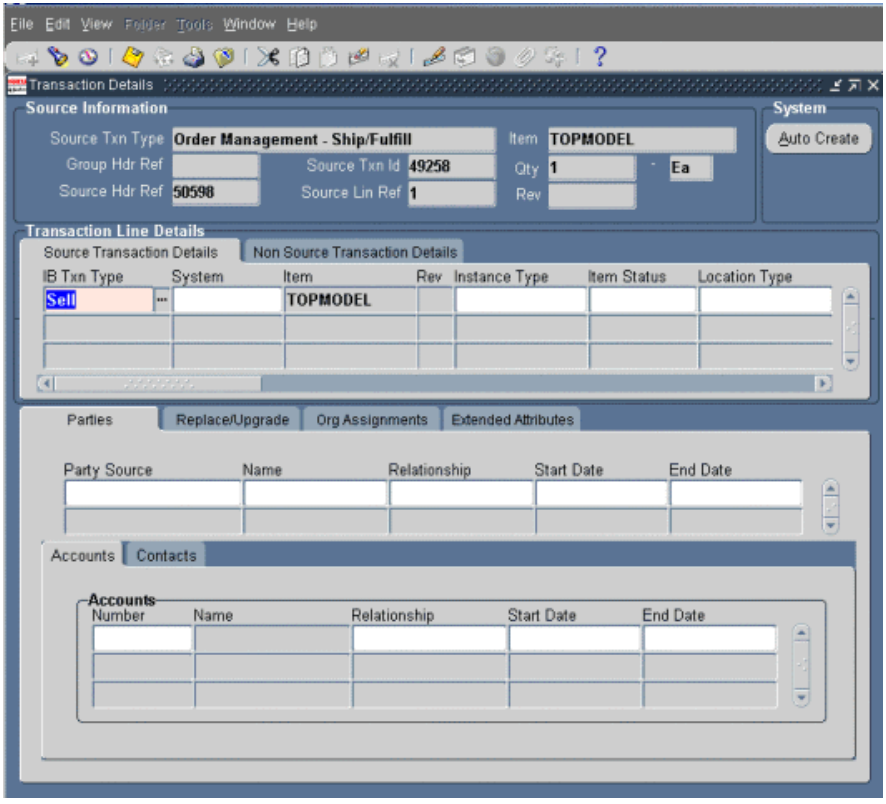
7. Select Installation Details and click OK.

   The Transactions Details window appears.

6.2 The Transaction Details Window

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

Figure 6–1 Transaction Details Window



Source Information Region

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 Details 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 Oracle 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.

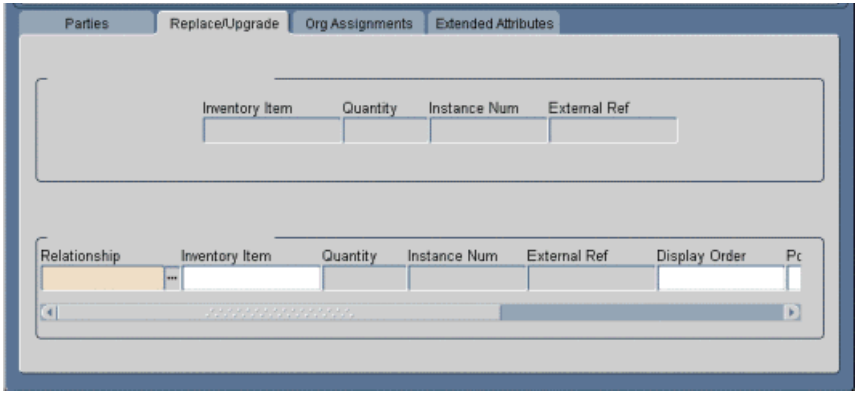
Parties Tab

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.

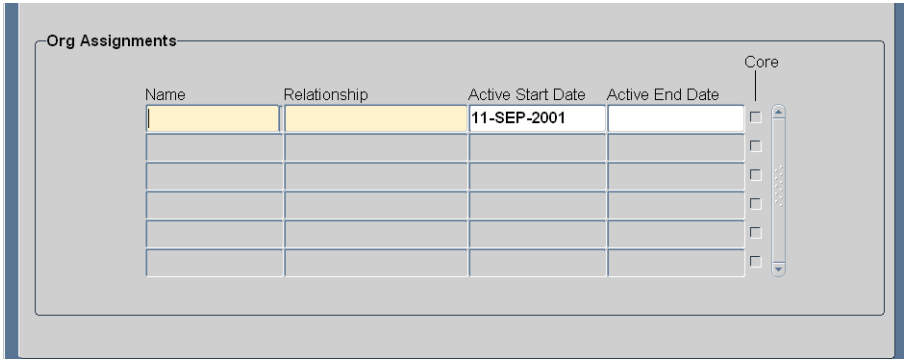
Figure 6–2 The Replace/Upgrade Tab of the Transaction Details Window



Org Assignments Tab

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

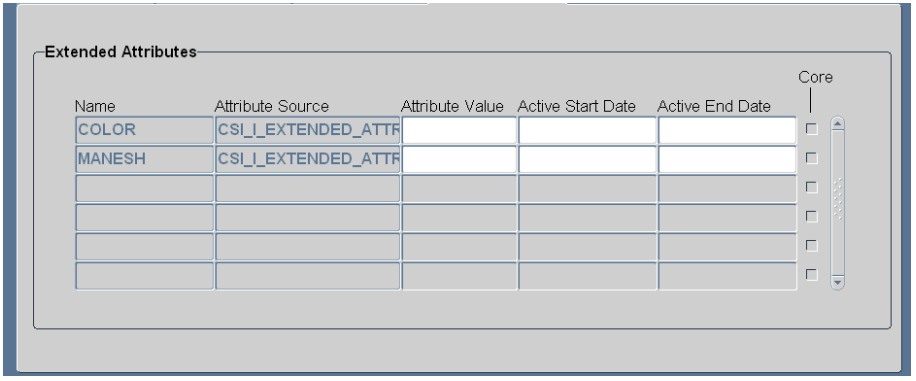
Figure 6–3 Org Assignments Tab



Extended Attributes Tab

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

Figure 6–4 Extended Attributes Tab



Accounts Tab

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 Tab

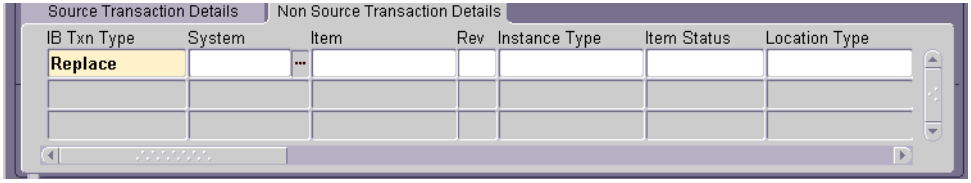
This tab is used to define contacts for a party. Multiple contacts can be specified for the same party of the source instance.

Non Source Transaction Details 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.

You can select an Oracle Install Base transaction type, IB Txn Type, in this window. The LOV for IB Txn Type is derived from the setup of Oracle Install Base transaction subtypes. The change in attributes to the non-source instance is based on the Non Source Info block of the selected transaction subtype.

Figure 6–5 Non Source Transaction Details Tab



7

Using the Transaction Errors Window

This topic group includes the following topics:

7.1 Overview

In the Transaction Errors window you can reprocess transactions that failed to update Oracle 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 Oracle 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

7.2 Reprocessing Transactions

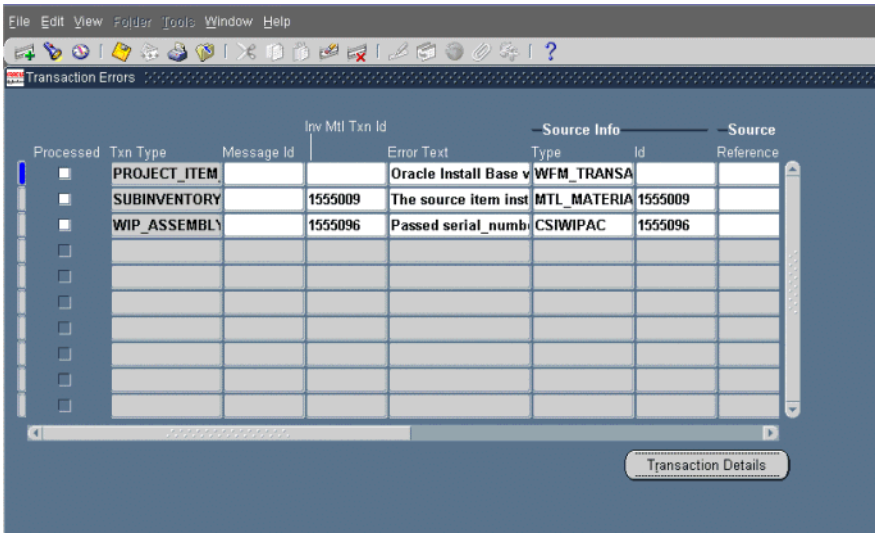
If an ERP source transaction is successful and the Oracle Install Base update errors-out, then the transaction appears with error text in the Transaction Errors window. You can correct the error, typically using the Transaction Details window. Then you can select the transaction and reprocess it to update Oracle 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 7–1 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 Oracle 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 Oracle 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 Oracle 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.

8

Using the Mass Edit/Future Dated Transaction Window

This topic group covers the following topics:

- Overview
- Using the Mass Edit Functions

8.1 Overview

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.

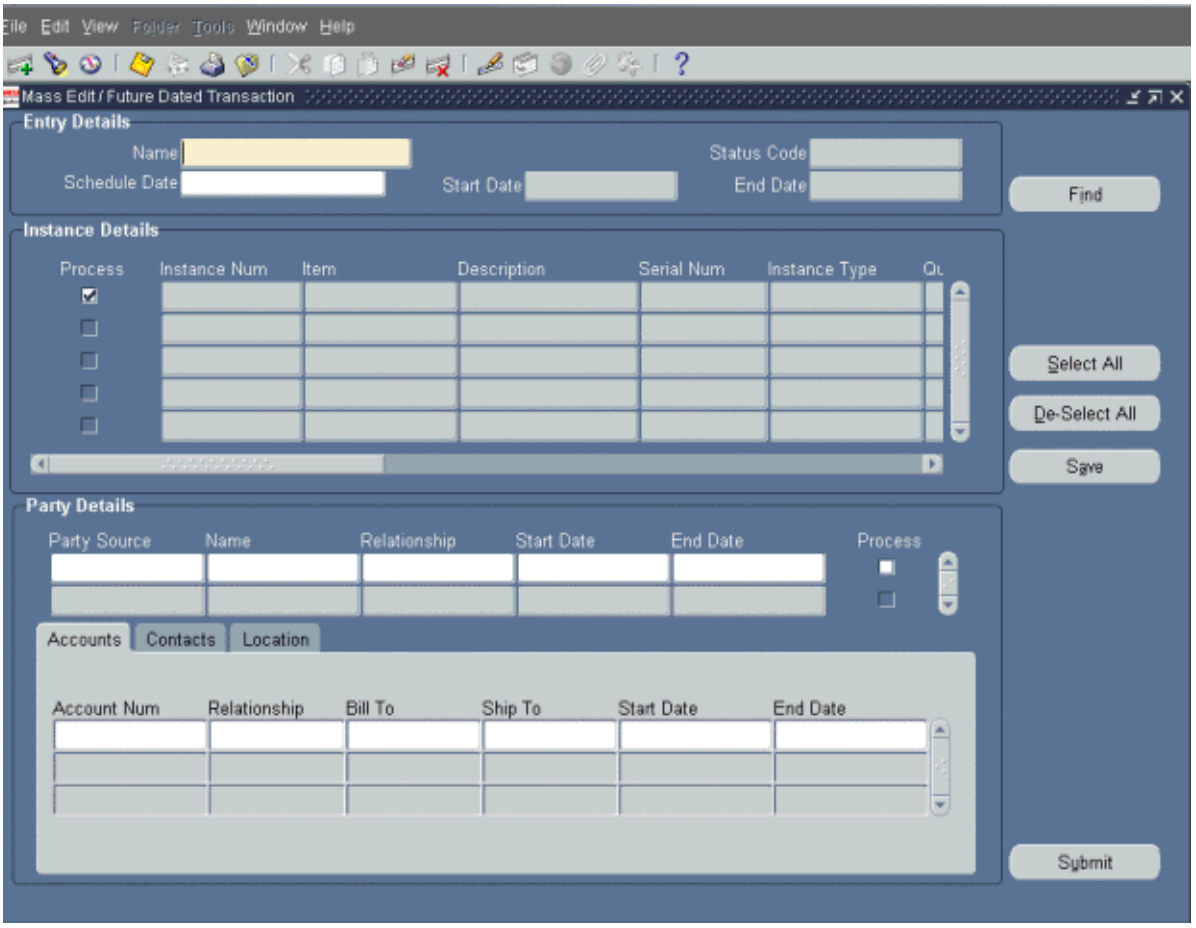
8.2 Using the Mass Edit Functions

Use this procedure to use the mass edit functions.

Steps

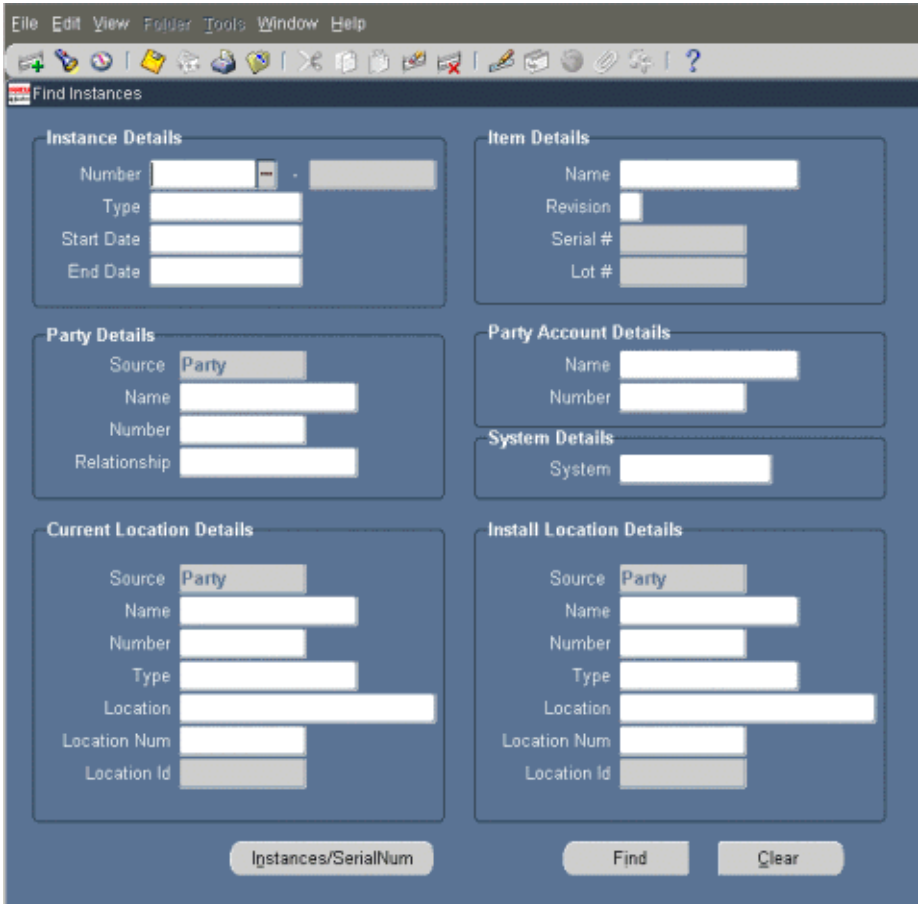
1. From the Responsibilities menu of the forms mode, select the Oracle Install Base Administrator responsibility, and click OK.
2. Navigate to Mass Edit.

   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.

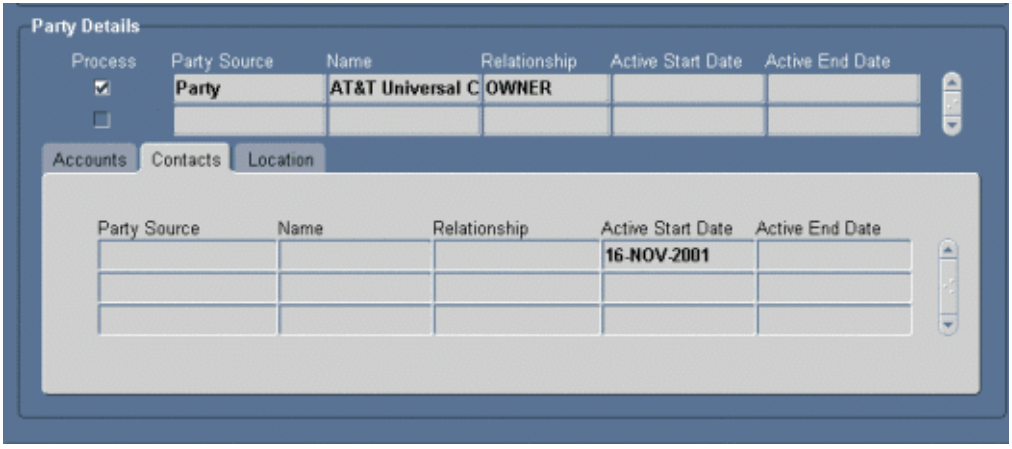
   In the Party Details region, the existing relationship types collectively owned by the instances appear. The owner relationship is the first one to be displayed.

8. As desired, change the party by selecting another value from the LOV.

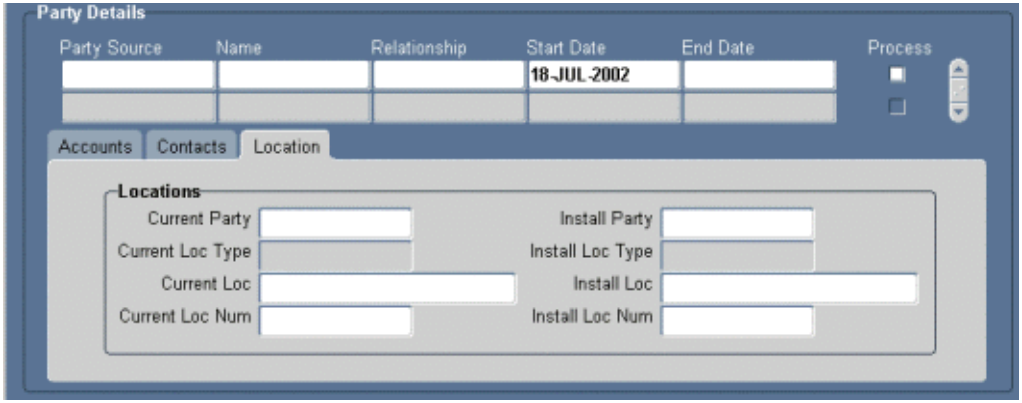
9. As desired, change the owner. If you do so, you must also change the account number.

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.



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.



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.

9

Using the Open Interface Program

This topic group contains the following topics:

- Overview of the Open Interface Program
- Running the Open Interface Program
- Guidelines for Loading Open Interface Tables
- Examples of Populating Open Interface Tables

9.1 Overview of the Open Interface Program

9.1.1 Features

Oracle Install Base provides the following Open Interface features:

- Initial mass load

  This imports significant volumes of data into Oracle Install Base application tables. The data may be from multiple sources including external legacy systems.

  Key integration with Oracle E-Business Suite applications includes optional calls to Oracle Service Contracts for warranty creation and creation of counters during item instantiation using Open Interface functionality.

- Incremental load

  This synchronizes Oracle Install Base with subsystems by importing item instances from different feeder systems on a frequent, on-going basis. This application ensures accuracy, consistency, and up-to-date information between multiple systems.

- Change functionality

  This provides a mechanism to automate the process of adding as well as updating changes to item instance attributes including:

  - Add new party relationships to existing item instances
  - Add new physical attributes to the item instances
  - Add new contact information
  - Add new configuration elements
  - Change the party relationships of existing instances
  - Change contact information
  - Change configuration (relationships between item instances)
  - Remove and expire item instances
  - Remove and expire configuration, cascading
  - Remove and expire party relationships
  - Remove and expire contact information

- Data validation

  Imported data is validated to ensure data integrity with Oracle applications. You can set up and define rules to be applied for validation and manipulation of item instance data during the Open Interface Mass Load process.

Open Interface includes user interfaces to:

- Submit the Open Interface Import process
- View and update error transactions

Note: Oracle Install Base Open Interface provides a user interface to view, update, and correct *error* transactions in the open interface tables. Using this user interface, you cannot view other transactions, such as initial load transactions and transactions without errors.

Oracle Install Base Open Interface functionality is restricted to customer products. It does not support internal items and instance assets.

9.1.2 Process

The process overview for a user of the Oracle Install Base Open Interface application is as follows:

1. Load data into a set of interface tables provided by Oracle Install Base
2. Run a mass load concurrent program that reads, validates, and posts the data into Oracle Install Base tables. The program posts records that fail validation to Open Interface error tables.
3. Review and edit failed transactions.
4. Resubmit edited transactions for processing and loading into Oracle Install Base

9.2 Running the Open Interface Program

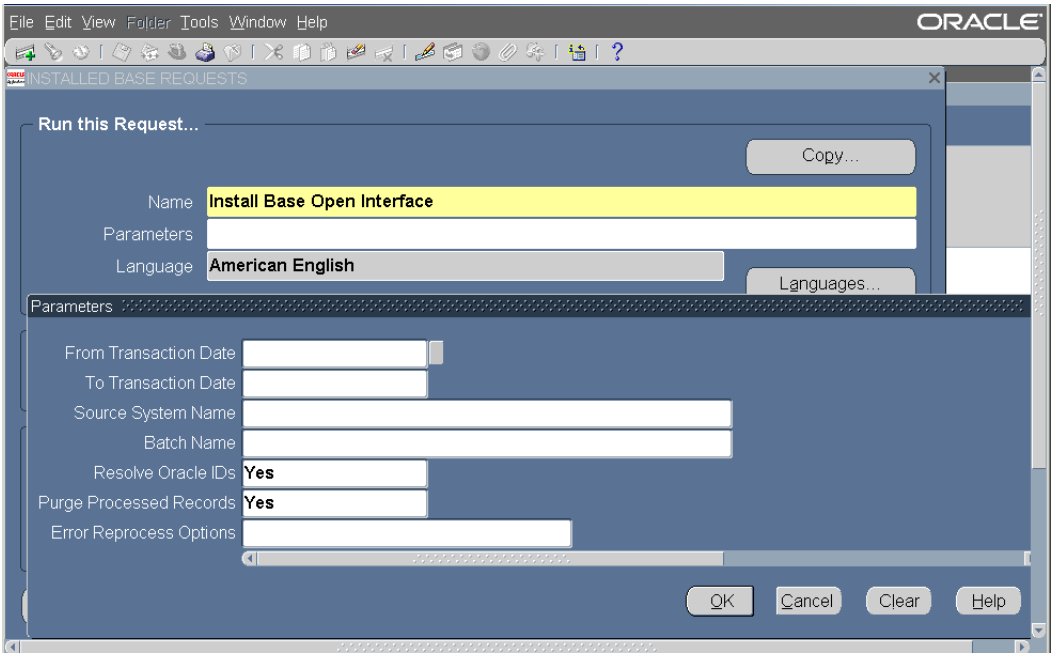
Use this procedure to run the Open Interface programs:

Steps

1. Load the Open Interface tables, using SQL Loader or a custom program.
2. Using the Forms mode and the Oracle Install Base Admin responsibility, navigate to Others > Setups > Requests.

   The Install Base Requests window appears.
3. If you need general information about submitting requests, then click Help.
4. From the Name LOV, select either Install Base Open Interface or Install Base Open Interface-Parallel Concurrent Workers.

Figure 9–1 Request for the Install Base Open Interface Program



Oracle Install Base has two programs available to process open interface records, Install Base Open Interface and Install Base Open Interface-Parallel Concurrent Workers.

Install Base Open Interface submits the process to post records from the interface tables to the core Oracle Install Base tables.

Install Base Open Interface-Parallel Concurrent Workers submits the interface program with the Parallel Workers option, which indicates number of parallel processes to be run. Interface transactions are evenly divided by this number, and the original concurrent request is submitted the number of times indicated by the parameter. The process enhances speed and performance of the mass load process and is used for high volume loads. The parallel workers feature is used only for creating Oracle Install Base records. When loading the Open Interface tables, the Parallel Worker ID column must be populated with a value of -1. The transaction identifier column in table CSI_INSTANCE_INTERFACE must be null.

5. Click in the Parameters field.

The Parameters window appears.

6. Enter the required parameters.

   Available Parameters:

   Source System Name: (Required). Selects from names loaded to Interface tables.

   Batch Name: (Optional). Provides ability to choose specific or all batches loaded to Open Interface tables.

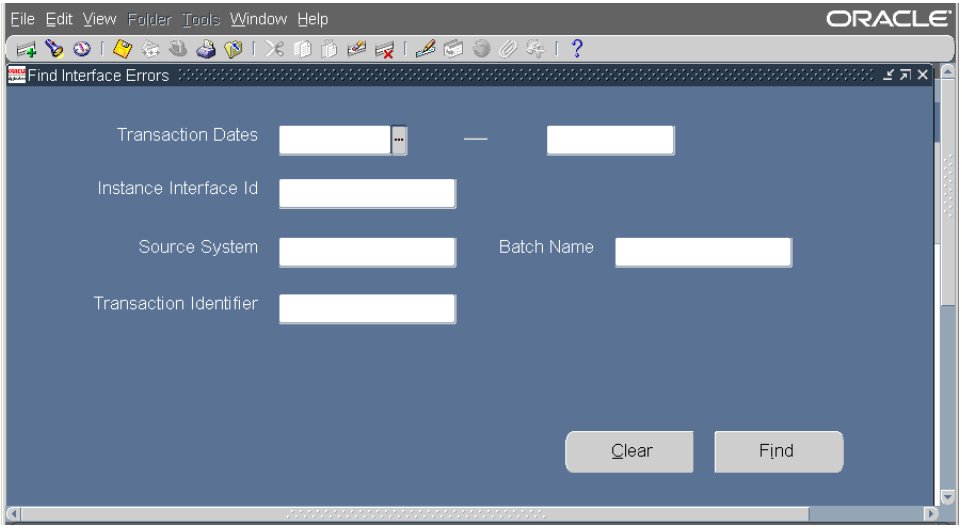
   Resolve Oracle IDs: Yes = Derive IDs by matching item descriptions in interface transactions with Oracle Inventory tables.

   Purge Processed Records: Purges processed records. Status = P (Processed).

7. Click OK to return to the Install Base Requests window.
8. Complete the information, and click Submit.
9. After the program has run, navigate to Open Interface Error Details.

   The Find Interface Errors window appears.

Figure 9–2 Find Interface Errors Window



10. Complete the desired entries, and click Find.

The Open Interface Error Details window appears.

11. Review and edit error transaction details. Select the Process checkbox for transactions that you want to reprocess.
12. Save your changes.
13. Go to step 2 to resubmit the Install Base Open Interface program to load the records into Oracle Install Base tables.

9.3 Guidelines for Loading Open Interface Tables

Here are general guidelines for loading Open Interface tables:

1. Set up the source system details before using the Open Interface functionality.
2. Use the appropriate value for Transaction_Identifier. The value must be unique for the same source_system_name.
3. Set replace_flag to Y only if the complete structure, or image, of the item instance is being processed.
4. Any type of transaction requires at least one row in the CSI_INSTANCE_ INTERFACE table.
5. Child entity updates, such as instance_party update and ip_account_update, must have a corresponding row with the same inst_interface_id in the csi_ instance_interface table.
6. Get NEXTVAL from the respective instances for populating primary keys of the interface tables
7. Make sure that all the referenced entities are populated with their respective IDs before running the Open Interface program. For example, inventory_item exists in mtl_system_items, party exists in the respective party tables, and order line exists in the order entry tables.
8. When including pricing attributes on an instance, make sure that the Pricing Context Flexfield (QP_ATTR_DEFNS_PRICING) has the Context Field Code Value defined and the related segments specified.
9. The Open Interface program resolves the IDs from different tables from the descriptive values provided in the interface tables and also validates the existence of all the referenced IDs.

10. Transaction Identifier along with Source_System_Name is used to identify the set of instances and instance relationships. This set is committed as a single database transaction.

The following table shows the column names and table views used for validations.

Table 9–1 Table Columns and Views Used for Validations

Reference Number	Column Name	Table and View used for Validation
-	CSI_Instance_Interface	-
1	Inventory_item_id	Mtl_system_items_kfv
2	Inv_vld_organization_id	Hr_all_organization_units
3	Unit_of_measure_code	Mtl_all_primary_uoms_vv
4	Serial_number	Mtl_serial_numbers
5	Lot_number	Mtl_lot_numbers
6	Project_id	Pa_projects_all
7	Task_id	Pa_tasks
8	Inv_organization_id	Mtl_organizations
9	Wip_job_id	Wip_entities
10	Po_order_line_id	Po_headers_all, po_lines_all
11	Oe_order_line_id	Oe_order_headers_all, oe_order_lines_all
12	Intransit_order_line_id	Oe_order_headers_all, oe_order_lines_all
13	Oe_rma_line_id	Oe_order_headers_all, oe_order_lines_all
14	Operating_unit	Hr_operating_units
15	Instance_condition_id	Mtl_material_statuses
16	Instance_status_id	Csi_instance_statuses
-	CSI_I_PARTY_Interface	-

Table 9–1 Table Columns and Views Used for Validations

Reference Number	Column Name	Table and View used for Validation
17	Party_id	Based on the party_source_table: ■ 'HZ_PARTIES' - hz_parties ■ 'VENDORS' - po_vendors ■ 'EMPLOYEE' - per_all_people_f ■ 'TEAM' - jtf_rs_teams_vl ■ 'GROUP' - jtf_rs_groups_vl
18	Party_account1_id	Hz_cust_accounts
19	Party_account2_id	Hz_cust_accounts
20	Party_account3_id	Hz_cust_accounts

The following table provides information about the setup of the source system.

Table 9–2 Setup of the Source System

Reference Number	Parameter	Description
1	Source System ID	You can get the next value from the sequence CSI_INSTANCE_SOURCES_S.
2	Source System Name	Unique name of the source system from which the item instances are interfaced.
3	Source_lang	Source language of the descriptive data such as party name to be used to get IDs.

The following table describes the table columns that are specific to Open Interface.

Table 9–3 Table Columns Specific to Open Interface

Reference Number	Column Name	Desciption
1	INST_INTERFACE_ID	This is the Primary key for the table. Interfaced rows are processed in the order of this key. You can get the next value from the sequence CSI_INSTANCE_INTERFACE_S.
2	IP_INTERFACE_ID	You can get the next value from the sequence CSI_I_PARTY_INTERFACE_S.

Table 9–3 Table Columns Specific to Open Interface

Reference Number	Column Name	Desciption
3	IEAV_INTERFACE_ID	You can get the next value from the sequence CSI_IEA_VALUE_INTERFACE_S.
4	REL_INTERFACE_ID	You can get the next value from the sequence CSI_INST_REL_INTERFACE_S.
5	TRANSACTION_ IDENTIFIER	There is a composite uniqueness on transaction_ identifier and source_system_name. All the records corresponding to the same transaction_ identifier are processed as a single database transaction. If you creating an top assembly, then you must stamp all the corresponding records in all the Oracle Install Base Open Interface tables with the same transaction_identifier.
6	PROCESS_STATUS	You must populate this column with 'R', used for READY. The processor picks only those records with 'R' value. The processor sets this values to 'P' if processed OK or 'E' if there is an ERROR while processing.
7	PARALLEL_WORKER_ ID	For internal use only. When the parallel processing feature is used, this column gets populated by an internal program. When using the parallel worker feature, set this to (-1) for those records in the interface table that will use parallel workers.

9.4 Examples of Populating Open Interface Tables

Before you insert into any of the Oracle Install Base Open Interface tables, make sure that you get IDs into their respective variables, such as the following:

- SELECT csi_instance_interface_s.nextval INTO l_inst_interface_id FROM DUAL
- SELECT csi_I_party_interface_s.nextval INTO l_ip_interface_id FROM DUAL
- SELECT csi_iea_value_interface_s.nextval INTO l_ieav_interface_id FROM DUAL
- SELECT csi_ii_relation_interface_s.nextval INTO l_iir_interface_id FROM DUAL

You must have a unique transaction identifier for every source system.

You must have a record in the CSI_INSTANCE_INTERFACE table for every instance that you process. You must reference the same inst_interface_id in the corresponding rows in the other child or relationship interface tables such as CSI_I_PARTY_INTERFACE, CSI_IEA_VALUE_INTERFACE, or CSI_II_RELATIION_INTERFACE.

If you want to update a specific item instance, then you must provide the instance number in the interface table CSI_INSTANCE_INTERFACE.

When you want to create an instance-instance relationship for new instances, you must populate the CSI_INSTANCE_INTERFACE table with the instance details and reference the INST_INTERFACE_ID as SUBJECT_INTERFACE_ID or OBJECT_INTERFACE_ID in the CSI_II_RELATION_INTERFACE table.

When you want to create an instance-instance relationship for existing instances, you must populate corresponding rows in the CSI_INSTANCE_INTERFACE table with the instance number and then reference those INST_INTERFACE_IDs as SUBJECT_INTERFACE_ID or OBJECT_INTERFACE_ID in the CSI_II_RELATION_INTERFACE table appropriately.

Refer to the following table for descriptions of how to populate the interface tables under various scenarios

Table 9–4 Scenarios for Populating Interface Tables

Reference Number	Scenario	How to Populate
1	Create an item instance with one party	A row in the table CSI_INSTANCE_INTERFACE and a row in the table CSI_I_PARTY_INTERFACE referencing the INST_INTERFACE_ID of the parent table
2	Create an item instance with one party and an party account	A row in the table CSI_INSTANCE_INTERFACE and a row in the table CSI_I_PARTY_INTERFACE with Party details and Party Account details. Reference the INST_INTERFACE_ID of the parent table in the child table.
3	Create an item instance with one party and an extended attribute value	The extended attribute has to be set up prior to the interface process. You need to create a row in CSI_INSTANCE_INTERFACE. A row in the table CSI_I_PARTY_INTERFACE and a row in CS_IEA_VALUE_INTERFACE. All the child table rows to have referenced INST_INTERFACE_ID.

Table 9–4 Scenarios for Populating Interface Tables

Reference Number	Scenario	How to Populate
4	Change the owner	One row in CSI_INSTANCE_INTERFACE table with instance_number, new party details and INST_ INTERFACE_ID in the table CSI_I_PARTY_ INTERFACE.
5	Add Party Account	One row in CSI_INSTANCE_INTERFACE table with instance_number, details of to which party the account is added, new party account details in the table CSI_I_PARTY_INTERFACE.
6	Update party account details	One row in CSI_INSTANCE_INTERFACE table with instance_number, details of updated party account in the table CSI_I_PARTY_INTERFACE.
7	Remove a party account	One row in CSI_INSTANCE_INTERFACE table with instance_number, details of updated party account with an end date in the table CSI_I_PARTY_ INTERFACE.
8	Add a pricing attribute	One row in the CSI_INSTANCE_INTERFACE with instance number and pricing attribute details in the same record.
9	Add an org assignment	One row in the CSI_INSTANCE_INTERFACE with instance number and organization assignment details in the same record.
10	Remove a pricing attribute	One row in the CSI_INSTANCE_INTERFACE with instance number and pricing attribute context and pricing attribute end date in the same record.
11	Update a pricing attribute	One row in the CSI_INSTANCE_INTERFACE with instance number and changed pricing attribute details in the same record.
12	Remove an organization assignment	One row in the CSI_INSTANCE_INTERFACE with instance number and organization assignment identifiers and org_assignment end date in the same record.
13	Add an extended attribute value	One row in the CSI_INSTANCE_INTERFACE with instance number and one row in CSI_IEA_VALUE_ INTERFACE with details of new extended attribute value.
14	Remove an extended attribute value	One row in the CSI_INSTANCE_INTERFACE with instance number and one row in CSI_IEA_VALUE_ INTERFACE identifier with an end date.

Table 9–4 Scenarios for Populating Interface Tables

Reference Number	Scenario	How to Populate
15	Create a UNIT consisting of two related instances with one instance party each.	Two rows in CSI_INSTANCE_INTERFACE. Two corresponding rows in CSI_I_PARTY_INTERFACE. One row in CSI_II_RELATION_INTERFACE, giving the corresponding INST_INTERFACE_IDs as SUBJECT_INTERFACE_ID and OBJECT_ INTERFACE_ID.

10

Implementing and Using Counters

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

This topic group includes the following topics:

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:

- Oracle TeleService
- Oracle Install Base
- Oracle Service Contracts
- Oracle Depot Repair
- Oracle Field Service
- Oracle Mobile Field Service
- Oracle Spares Management
- Oracle Logistics
- Oracle 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 Oracle 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.

Table 10–1 Definitions and Terms

Feature Name	Function
Counter Template	A template that is defined for groups of counters and instantiated in Oracle 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 Oracle 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 Oracle 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.

Oracle Install Base Life Cycle Tracking

Counters uses Oracle 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.

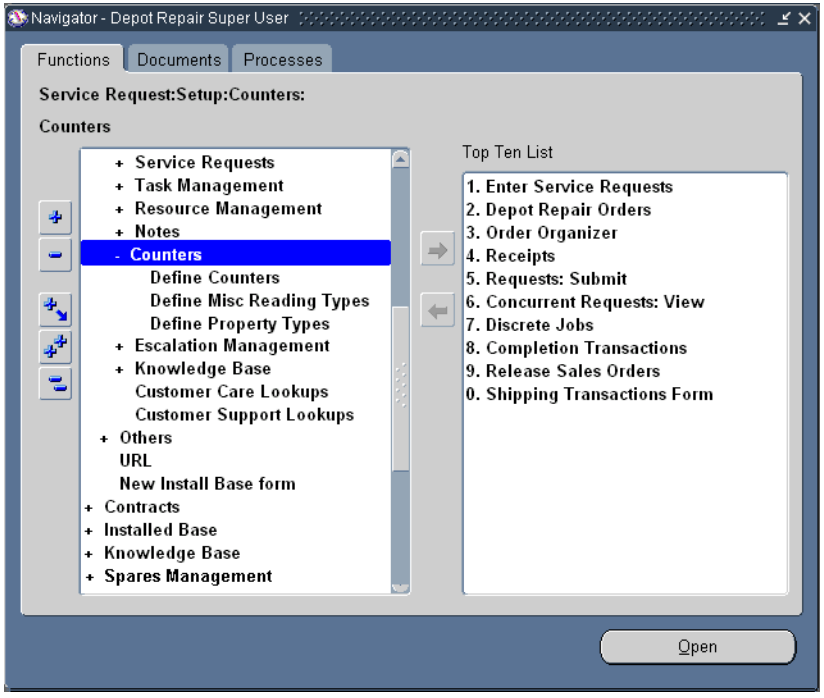
10.2 The Basics of Counters

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

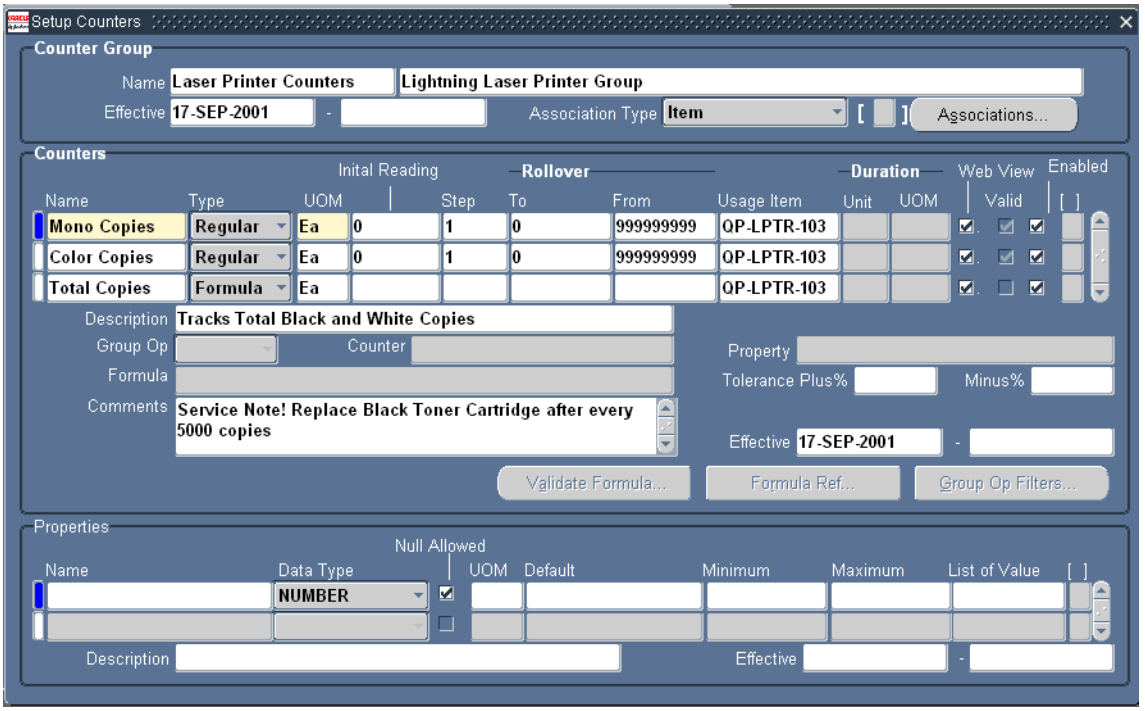
Navigator Item	Functional Description
Define Counters	View and define counter group templates and counters.
Define Misc. Reading Types	View and define miscellaneous reading types for LOV lookups.
Define Property Types	View and define and counter property types and values for LOV lookups.

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, COUNT, and AVERAGE 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. Counters defined as AVERAGE calculate daily averages based on regular counters. Alternatively, a parameter is provided to indicate the number of readings to be considered in the daily average calculation.

Table 10–4 Explanations and Defaults

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

Table 10–6 Value Set for the CS_CTR2 Property Code

Value Code	Meaning	Description
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.

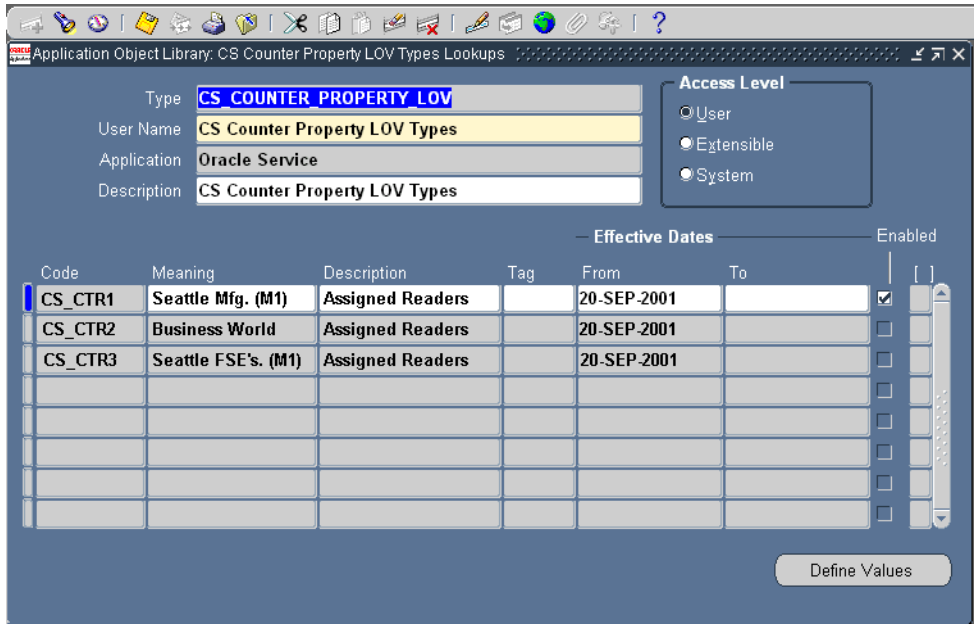
Steps

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

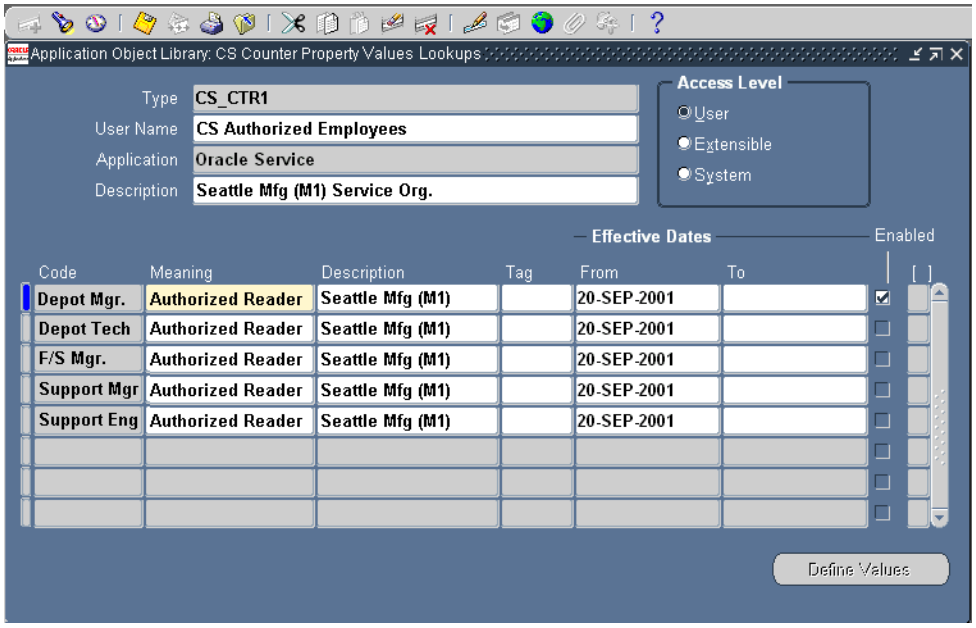


2. Define a Property Type by completing the following:
   a. Enter a Code such as `CS_CTR1`.
   b. Enter a Meaning such as `Seattle Mfg. (M1)`.
   c. Enter a Description such as `Assigned Readers`.
   d. Leave the Tag field blank.
   e. Select a from date. The application automatically supplies one .
   f. Select a to (end) date. Leave this blank if no expiration occurs.
   g. Confirm that the Enabled checkbox is selected.
3. Repeat Step 2a through 2g for each new property type code that you wish to add. Choose a different meaning for each code to avoid any duplication errors.
4. From the toolbar menu, click the Save icon to update and save the record.
5. Set focus on the code line for which you want to create a values table and proceed to the next step.

Define Values for Property Types

6. Click Define Values to launch the CS Counter Property Values Lookups window with the header details auto-populated into the window.

Figure 10–4 Window for CS Counter Property Values Lookups



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.

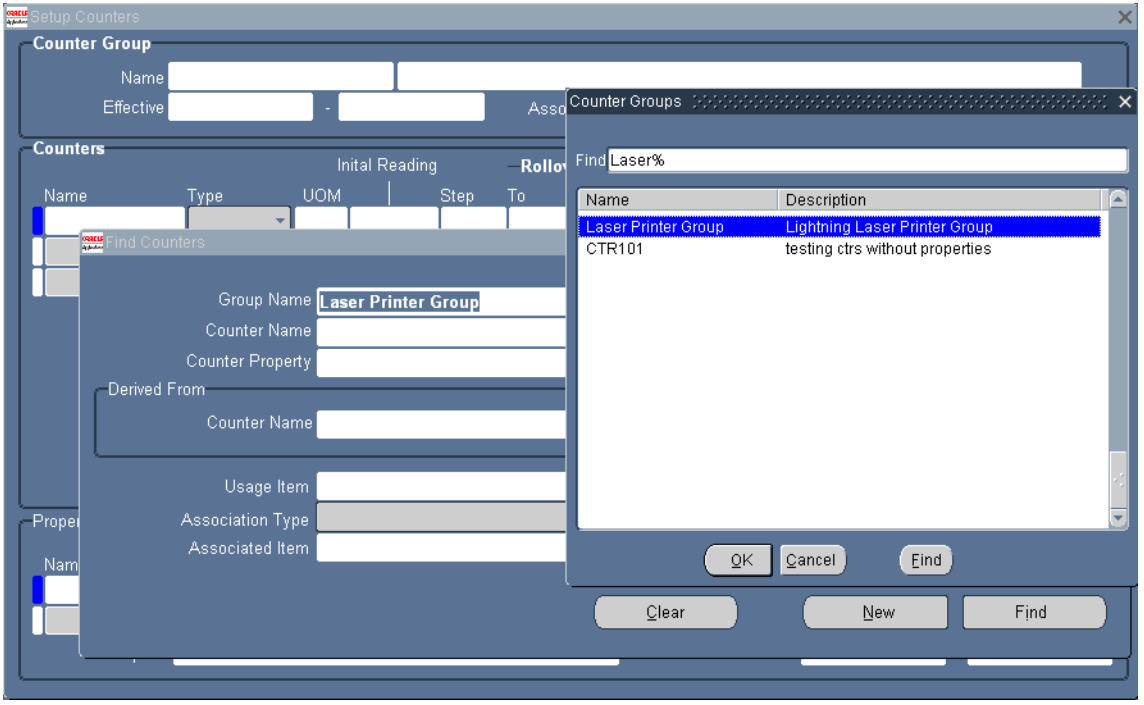
Prerequisites

None.

Steps

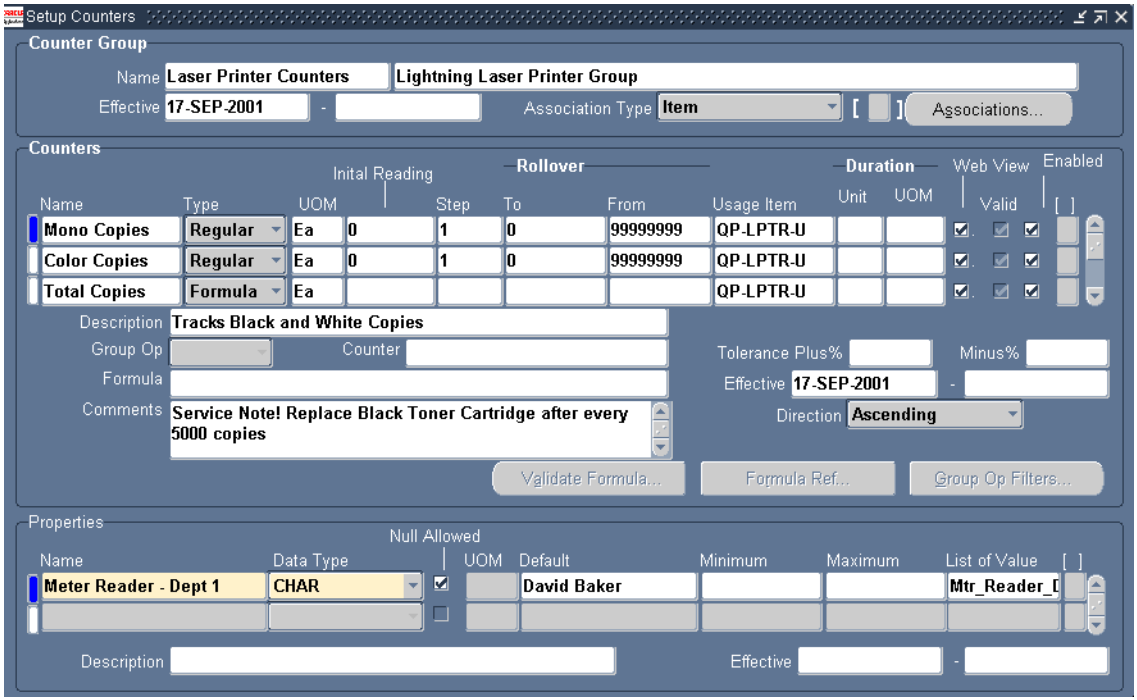
1. From the Navigator Menu list, double-click Service Request.
2. Double-click Setup from the Service Request submenu list.
3. Double-click Counters from the Setup submenu list.
4. Click Define Counters to launch the Find Counters window, and then click New.

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 *i*Support 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, COUNT, or AVERAGE.

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.

Explanation of AVERAGE

Counters defined as AVERAGE calculate daily averages based on regular counters. Alternatively, a parameter is provided to indicate the number of readings to be considered in the daily average calculation.

Average calculations are based on usage. Usage refers to the delta or difference between meter readings and indicates consumption or utilization over time.

Counters provides two methods of averaging counter readings:

- Count-based average

  This provides a progressive average of the prior x or y number of readings.

- Time-based average

  This provides an average of usage based on time. For example, average counters may be defined to calculate daily averages based on regular counters.

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). For example: Ea. (Each)
8. Select the usage item for this counter.

9. Identify counter description and effective dates.
10. Select the Group Operation of SUM, COUNT, or AVERAGE.
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. If you selected either SUM or Count, then you can optionally 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 Oracle 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

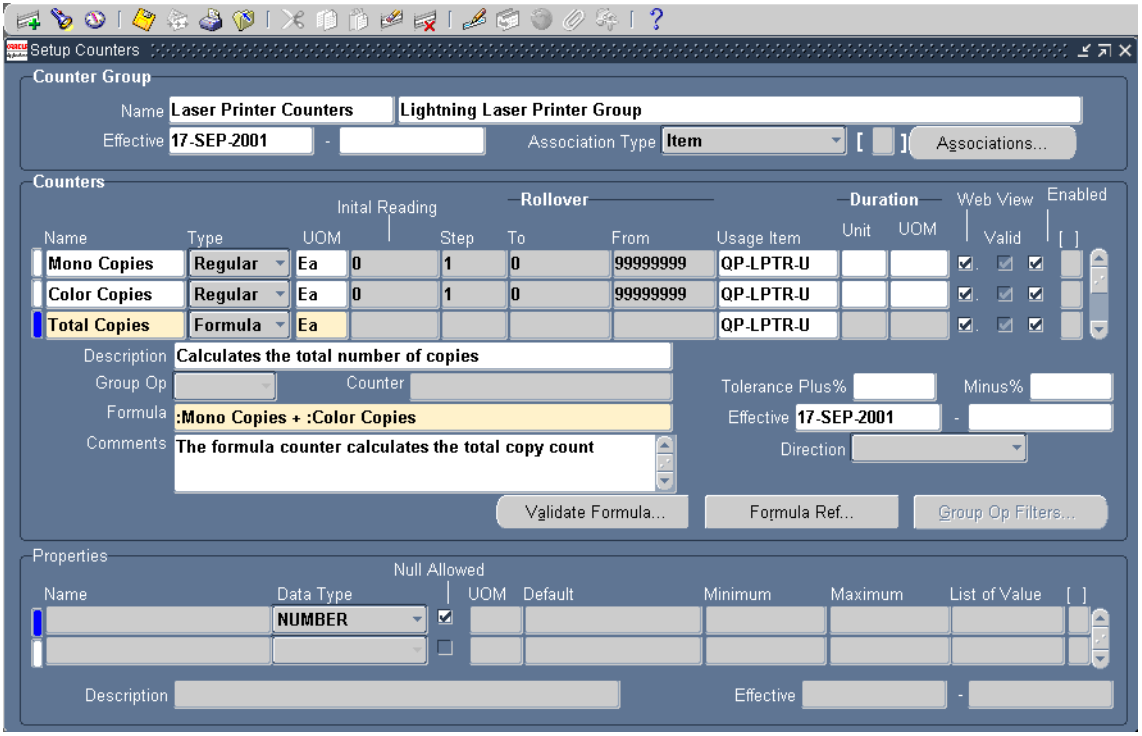
1. From the Navigator Menu, double-click Service Request.
2. Double-click Setup from the Service Request submenu list.
3. Double-click Counters from the Setup submenu list.
4. Click Define Counters to launch the Counters Find window, and then click New.
5. Complete the Counter Group information described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



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.

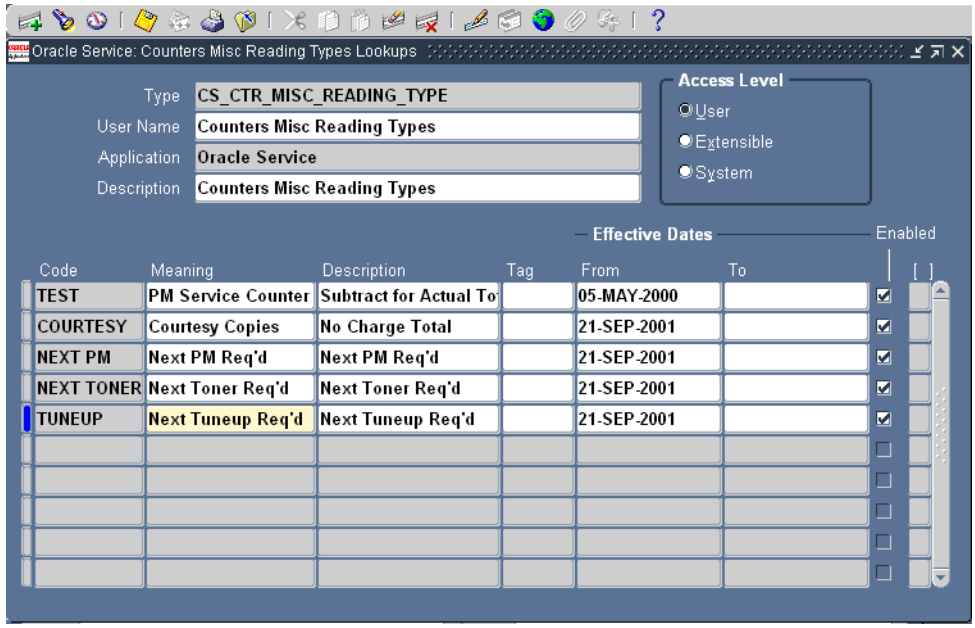
Prerequisites

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.

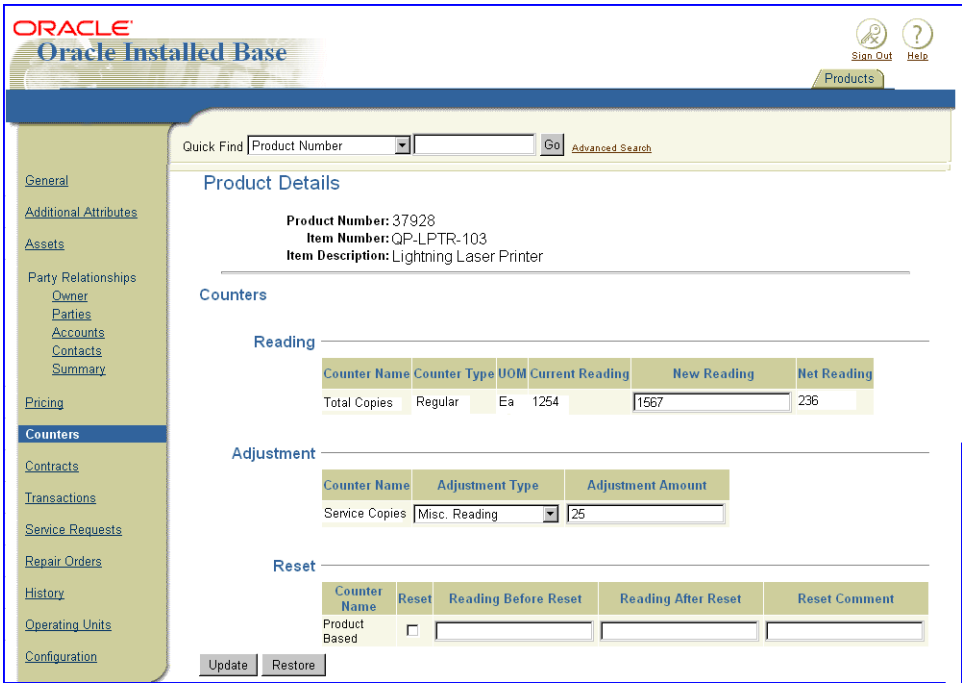
10.15 Automatic Instantiation of Counters

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 Oracle Install Base and Oracle Service Contracts records with the latest readings.

10.16 Viewing and Capturing Readings from Oracle iSupport

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

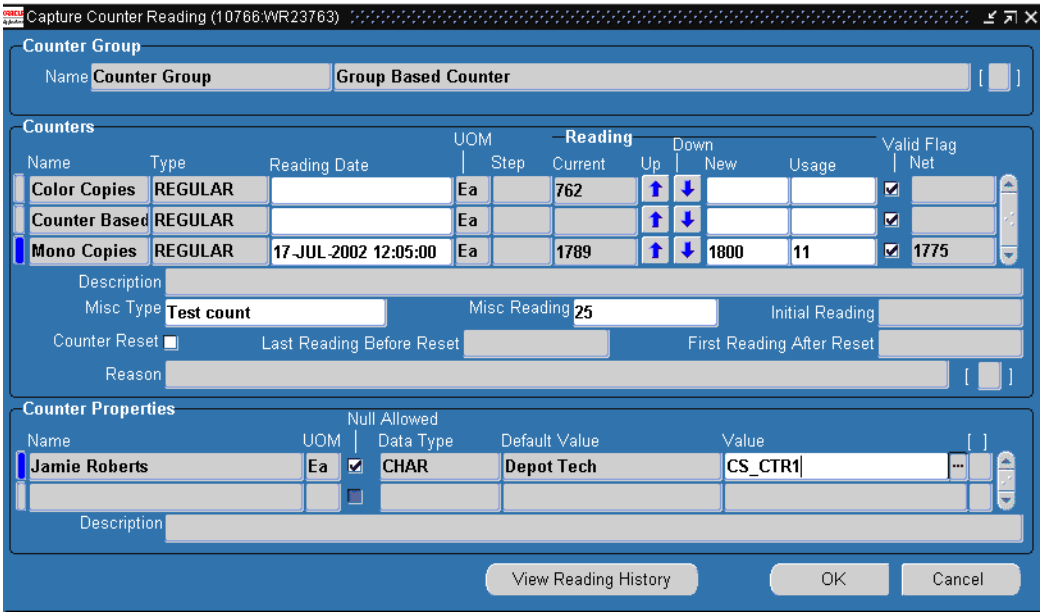
Figure 10–9 *Oracle Install Base* ***HTML Counters Page***



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



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_CTR1.

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 Oracle 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.

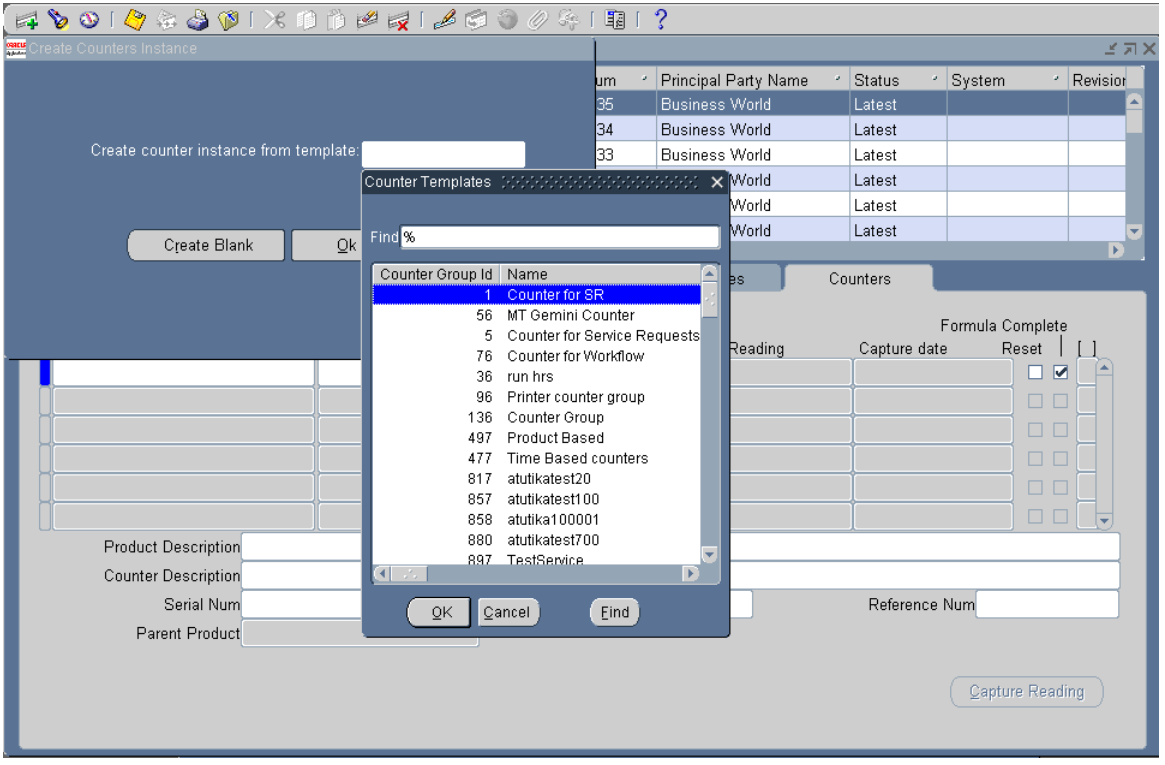
Steps

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 Oracle 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 Oracle 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 Oracle Install Base Product and Summary window.
14. Confirm that counters were instantiated for the selected Oracle 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: Net = New reading - 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. A derived counter such as a formula counter cannot be modified. Rather, you can expire (end-date) it and create a new one. 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.