

**Oracle® iAssets**

User Guide

Release 11*i*

**Part No. B14378-02**

April 2005

Oracle iAssets User Guide, Release 11i

Part No. B14378-02

Copyright © 2004, 2005, Oracle. All rights reserved.

Primary Author: Gail D'Aloisio

Contributing Author: Gladys Leung, Julianna Litwin, Mohammed Siddiqui, Linette Son, Somasundar Viswapathy

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

#### U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, and PeopleSoft are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

---

# Contents

## Send Us Your Comments

## Preface

### 1 Overview

<b>About Oracle iAssets</b> . . . . .	1-1
Asset Search . . . . .	1-1
Asset Transfers . . . . .	1-2
Seeded Responsibilities . . . . .	1-2
Security . . . . .	1-2
Human Resources System Integration . . . . .	1-3
User-Definable Approval Rules . . . . .	1-3
iAssets Manager Role . . . . .	1-3

### 2 Setting Up Oracle iAssets

<b>Setting Up Oracle iAssets</b> . . . . .	2-1
Related Product Setup Steps . . . . .	2-1
Setup Checklist . . . . .	2-2
<b>Defining Oracle iAssets Rules</b> . . . . .	2-4
Searching for Rules . . . . .	2-4
Defining Rules . . . . .	2-5
Assigning Rule Names to User Responsibilities . . . . .	2-6

### 3 Using Oracle iAssets

<b>Using Oracle iAssets</b> . . . . .	3-1
Oracle iAssets Home Page . . . . .	3-1
Using iAssets to Search for Assets . . . . .	3-1
Viewing Saved Requests . . . . .	3-2
Creating an Asset List . . . . .	3-2
Viewing Asset Details . . . . .	3-2
Create Transfer Request: Request Details . . . . .	3-2
Create Transfer Request: Releasing Details . . . . .	3-3
Create Transfer Request: Destination Details . . . . .	3-3
Create Transfer Request: Review . . . . .	3-3

iAssets Manager Home Page . . . . .	3-3
Transfer Request Page . . . . .	3-4
Update Assets as Group Page . . . . .	3-4
Requests Page . . . . .	3-4
Schedule Request Page . . . . .	3-4

## **A Oracle iAssets Profile Options**

<b>Profile Options in Oracle iAssets . . . . .</b>	<b>A-1</b>
Setup Profile Options Summary . . . . .	A-1
Setting Up Profile Options . . . . .	A-2

## **Index**

---

# Send Us Your Comments

## **Oracle iAssets User Guide, Release 11i**

### **Part No. B14378-02**

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the title and part number of the documentation and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Electronic mail: [appsdoc\\_us@oracle.com](mailto:appsdoc_us@oracle.com)
- FAX: 650-506-7200 Attn: Oracle Financials Documentation Manager
- Postal service:  
Oracle Financials Documentation Manager  
Oracle Corporation  
500 Oracle Parkway  
Redwood Shores, CA 94065  
USA

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

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



---

# Preface

## Intended Audience

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

See Related Documents on page viii for more Oracle Applications product information.

## TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

## 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. Accessibility standards will continue to evolve over time, and Oracle 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 more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

## Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

## Accessibility of Links to External Web Sites in Documentation

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

## Structure

- 1 Overview
- 2 Setting Up Oracle iAssets
- 3 Using Oracle iAssets

## Related Documents

### Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- Online Help – Online help patches (HTML) are available on OracleMetaLink.
- About Documents – Refer to the About Document for the mini-pack or family pack that you have installed to learn about new documentation or documentation patches that you can download. About Documents are available on OracleMetaLink.

### Guides 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 iAssets (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.

### User Guides Related to This Product

- **Oracle Assets User Guide**

In Oracle Assets, you can post capital project costs to become depreciable fixed assets. Refer to this guide to learn how to query mass additions imported from Oracle iAssets to Oracle Assets and to review asset information.

- **Oracle HRMS Documentation Set**

This set of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and organizations using Oracle HRMS windows. Specifically, the following manuals will help you set up employees and operating units:

- **Using Oracle HRMS – The Fundamentals**

This user guide explains how to set up and use enterprise modeling, organization management, and cost analysis.

- **Managing People Using Oracle HRMS**

Use this guide to find out about entering employees.

- **Implementing Oracle Approvals Management**

This guide explains how to define approval rules that determine the approval processes for Oracle Applications.

## 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 an Oracle Applications form 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.



---

# Overview

This chapter covers the following topics:

- About Oracle iAssets

## About Oracle iAssets

Oracle iAssets provides an easy-to-use system that provides powerful query functionality and automates most transfer events. Oracle iAssets allows you to find assets easily, enter the transfer information, and enter the approval information for the request. Oracle iAssets also allows you to automatically update Oracle Assets with the transfer information after the approval process.

Oracle iAssets comes with a built-in automated approval process using Oracle Approvals Management (AME). Oracle iAssets also comes with a built-in email notification system using Oracle Workflow.

## Asset Search

Oracle iAssets includes a powerful search tool you can use to find any assets that are available in the Oracle Assets system. Oracle iAssets includes two types of search mechanisms:

- **Simple Search:** The Simple Search page allows you to search by asset number, description, serial number, tag number, employee name, and location.
- **Advanced Search:** If you want to search using additional criteria, you can use the Advanced Search. The Advanced Search page allows you to search for specific assets or for many assets containing the same criteria. By default, the Advanced Search page allows you to search by asset number, description, tag number, and serial number. Users can add additional search criteria from a list of values.

**Note:** The assets you can query are determined by your security options setup. See: Security, page 1-2.

When you find assets, you have the option to add them to an asset list. You can search for more assets, save the asset list for later use, or use the asset list to create transfer requests.

**Note:** Before creating a transfer request, you must first create an asset list containing the assets you want to transfer.

## Asset Transfers

Oracle iAssets allows the following types of self-service asset transfers:

- Transfer assets from one cost center, company, or any other predetermined accounting segment to another cost center, company, or accounting segment.
- Transfer assets from one location to another.
- Re-assign assets from one employee to another when the employee is terminated or relocated.

## Seeded Responsibilities

Oracle iAssets provides the following seeded responsibilities:

- iAssets User responsibility  
Most users will use this responsibility to search for assets and create transfer requests. Users can also monitor the status of their transfer requests from this responsibility, and can receive notifications and perform approval actions.
- iAssets Setup Administrator responsibility  
This responsibility is used by the iAssets system administrator to set up and manage iAssets rules.
- iAssets Manager responsibility  
This responsibility is usually used by the fixed asset manager (Oracle iAssets manager). The Oracle iAssets manager can view all pending requests and assets. The Oracle iAssets manager can view all information regarding a transfer request, and change the transfer date, posting status, and destination details for each asset. The Oracle iAssets manager can also schedule requests.

## Security

Oracle iAssets provides the following types of security:

- Security by Accounting Segment: When this option is enabled on the Create Rule page, users can view, query, or update only the segments that have been enabled by the Oracle iAssets system administrator.
- Security by Cost Center: When the Enforce Security by Cost Center check box is checked on the Create Rule page, users will only be able to query and transfer assets that are currently assigned to his or her cost center.

**Note:** The cost center of the asset is the cost center in the expense account that is assigned to the asset. The cost center of the employee is the cost center of the default purchase account.

- Search Options: When the Restrict users to only search for their saved requests check box is checked on the Create Rule page, users are able to see only their own requests.
- Security by Corporate Book: Users will have access only to assets that are in the assigned corporate book.

For more information on setting up security options, see: Defining Rules, page 2-5.

## Human Resources System Integration

Oracle iAssets integrates with the Oracle Human Resources Management System. This integration is executed through Oracle Approvals Management (AME). Non-Oracle Human Resources applications can also use AME to identify an approver or verify an approver's authority.

**Note:** If you use a non-Oracle Human Resources application to interface with Oracle Approvals Management, you must still set up employees in Oracle Human Resources.

## User-Definable Approval Rules

Every company has their own specific processes for defining approvals. Oracle iAssets allows companies to define individual approval rules through the AME approvals setup process.

The approval process is based on AME and Workflow. AME and Workflow regulate the emails and the sequence of approvers. Approvers log into the application to view notifications and perform approval actions.

## iAssets Manager Role

The iAssets Manager responsibility allows you to log in and view all asset transfer requests and all assets and their transfer information for these requests. Users logged into this responsibility have the ability to change the transaction date, posting status, and the destination employee location and expense account of asset lines before they are posted to the Oracle Assets system. Users will also be able to view the approval history of requests. Usually the fixed assets manager has access to the iAssets Manager responsibility.

If the Require iAssets Manager approval before applying any self-service transfers check box has been checked on the Create Rule page, the iAssets manager is required to approve all asset lines before posting. The iAssets manager must set each asset line to Post before transfers will be applied to the system by the Post Asset Transfer Requests program. If the Require iAssets Manager approval before applying any self-service transfers check box is checked, a status of Pending appears for each asset line on the View Request page. If the check box is not checked, the status is automatically set to Post after approval. In this case, approval by the iAssets Manager is optional.



---

# Setting Up Oracle iAssets

This chapter covers the following topics:

- Setting Up Oracle iAssets
- Defining Oracle iAssets Rules

## Setting Up Oracle iAssets

This section covers the steps that you follow in setting up Oracle iAssets.

Before you set up Oracle iAssets, set up Oracle Applications responsibilities and users for the implementation. Oracle iAssets provides Oracle iAssets responsibilities.

The Setup Checklist presents the steps that you follow to set up Oracle iAssets. If you are setting up other Oracle applications at the same time, you can also refer to the Related Products setup steps and tables.

## Related Topics

Related Product Setup Steps, page 2-1

Setup Checklist, page 2-2

## Related Product Setup Steps

You may need to perform the following steps to implement Oracle iAssets. These steps are discussed in detail in the Setting Up sections of their respective Oracle product user guides.

## Set Up Underlying Oracle Applications Technology

You need to set up underlying Oracle Applications technology, which includes the following steps:

- Perform system-wide setup tasks such as configuring concurrent managers and printers
- Manage data security, which includes setting up responsibilities to allow access to a specific set of business data and complete a specific set of transactions, and assigning individual users to one or more of these responsibilities.
- Set up Oracle Workflow

## Oracle Assets Setup Steps

Before implementing Oracle iAssets, you must implement Oracle Assets. See: Overview of Setting Up, *Oracle Assets User Guide*.

## Oracle Human Resources Setup Steps

Before implementing Oracle iAssets, you must implement Oracle Human Resources. Refer to the Setting Up section in *Implementing Oracle HRMS* for help in completing Oracle Human Resources setup steps, and to Setup Checklist, page 2-2 for information on the specific Human Resources setup steps that need to be completed for Oracle iAssets.

## Related Topics

*Oracle Applications System Administrator's Guide*

*Oracle Workflow Guide*

## Setup Checklist

The following table lists Oracle iAssets setup steps including steps that you need to complete in other products. For each step, the table lists whether the step is optional or required. After you log on to Oracle Applications, complete these steps to implement Oracle iAssets:

---

### Oracle Assets Setup Steps

Step 1

Required

#### **Set up Oracle Assets.**

See: Overview of Setting Up, *Oracle Assets User Guide*

**Context:** Perform this step once per installation.

### Oracle HRMS Setup Steps

Step 2	Conditionally Required	<p><b>Defining a Job.</b></p> <p>This step is required if you choose the Management hierarchy-based approvals option on the Create Rule page and the Absolute Job Level rule in AME. The default Absolute Job Level rule is set to level 3. This means that Oracle iAssets starts the approval chain from the requester's supervisor to each subsequent job level up to level 3. For Management hierarchy-based approvals to work properly using the default Absolute Job Level rule, you must create a job with approval authority of 3 or above and assign the approver to this job. Alternatively, you can change the Absolute Job Level via AME to match the job level of the final approver. See: <i>Defining a Job, Managing Your Workforce Using Oracle HRMS.</i></p> <p><b>Context:</b> Perform this step once for each job.</p>
Step 3	Required	<p><b>Enter employees.</b></p> <p>This step is required to define employees and supervisors. See: <i>Entering a New Person, Managing Your Workforce Using Oracle HRMS.</i></p> <p><b>Context:</b> Perform this step once for each Oracle iAssets user.</p>
Step 4	Conditionally Required	<p><b>Create an organization. The organization must have an organization classification of Company Cost Center.</b></p> <p>This step is required if you have set up Oracle iAssets to require cost center-based approvals or apply cost center security on the Create Rule page. For cost center-based approvals to work properly, each cost center must have a manager defined. See: <i>Creating an Organization, Using Oracle HRMS - The Fundamentals.</i></p> <p><b>Context:</b> Perform this step once per organization.</p>

Step 6	Optional	<p><b>Set up custom approval rules in AME.</b></p> <p>See: <i>Approval Rules (Implementing Oracle Approvals Management)</i>.</p> <p><b>Context:</b> Perform this step once per installation.</p>
Oracle iAssets Setup Steps		
Step 5	Required	<p><b>Set Up Rules.</b></p> <p>See: <i>Defining Oracle iAssets Transfer Rules</i>, page 2-4.</p> <p><b>Context:</b> Perform this step when ever you need to define rules.</p>
Step 6	Required	<p><b>Set up profile options.</b></p> <p>See: <i>Setting Up Profile Options</i>, page A-2.</p> <p><b>Context:</b> Perform this step when ever you need to define rule names.</p>
Step 7	Required	<p><b>Assign rule names to user responsibilities.</b></p> <p>See: <i>Assigning Rule Names to User Responsibilities</i>, page 2-6.</p> <p><b>Context:</b> Perform this step when ever you need to assign rule names to user responsibilities.</p>

---

## Defining Oracle iAssets Rules

You define Oracle iAssets rules to control the features that end users will be able to access. Oracle iAssets rules determine the transactions a user can access, whether the user can create transfer requests or query assets only, the approvals that are needed for a transfer request, and the approval method. You can also define custom text that will appear on the first page of the transfer process.

### Related Topics

Searching for Rules, page 2-4

Defining Rules, page 2-5

### Searching for Rules

Navigate to the Rules Search page to search for existing rules. You can also use this page to create new rules.

## Defining Rules

### To define self service asset transfer rules:

1. Log into the iAssets Setup Administrator responsibility.
2. Navigate to the Create Rule page.

#### System Options:

3. Enter a unique rule name.
4. Enter a description of the rule.
5. Assign a corporate book to the rule. Users will have access only to assets in the assigned corporate book.
6. Determine whether users will be able to use self service transfer functionality.
  - The Enable Self-Service Transfer Functionality check box must be checked to enable users to create transfer requests.
  - If you do not check this check box, users will only be able to search and view assets.
7. Determine whether users will be able to enter a transfer effective date while requesting a transfer.
  - If you check the Allow user-enterable transaction date check box, users will be able to enter the current date or any date within the current fiscal year. Users will not be able to enter future dates.
  - If you do not check this check box, the transfer date is set to the date the transfer is approved.

#### Approval Options:

8. Determine whether fixed asset manager (iAssets manager) approval is required before applying any self service transfers.
  - If you check the Require iAssets Manager approval before applying any self-service transfers check box, then Oracle iAssets will require approval from the fixed asset manager. The fixed asset manager can review the transfer lines from the iAssets Manager Responsibility and change the request status.
  - If you do not check the check box, after management approval, all transfer lines will be transferred to Oracle Assets with a status of Post.
9. Determine the approval type that will be required for each transfer request.
  - Both Releasing and Destination approvals required: If you choose this option, an Approver field appears for each asset selected for transfer on both the releasing and destination information pages. Both of these fields are required. This option is the default approval type.
  - No approvals required: If you choose this option, all transfer requests will be automatically approved.
  - Only Destination approvals required: If you choose this option, no Approver field will be displayed on the releasing information page. The Approver field will appear on the destination information page.

- Only Releasing approvals required: If you choose this option, the Releasing Approver field is required. No Approver field will be displayed on the destination information page.
10. Determine the approval method that will be required for each transfer request.
    - Cost Center-based approvals: If you choose this option, the default approver will be the cost center manager.
    - Management hierarchy-based approvals: If you choose this option, the default approver will be based on the employee hierarchy relationship. The employee is the person for whom the transfer is requested. The approver defaults to the user who logs in. This option is the default approval method.

**Security Options:**

11. Choose the accounting segments that will be displayed throughout Oracle iAssets.
12. Check the Enforce Security by Cost Center check box to allow users to view and perform transactions only on assets in their cost center. If you do not check this check box, users will be able to view and perform transactions on assets in all cost centers.

**Search Options:**

13. Determine whether users will be restricted to search only their own requests. If you choose the Restrict users to only search for their saved requests check box, users will be able to search only their saved requests. If this check box is not checked, users will be able to query all requests on the system.

**Custom Options:**

14. Determine whether you want to add any company-specific instructions that users need to follow before submitting a transfer. To add these instructions, you need to check the Enable custom text input check box, and enter the company-specific information in the Custom Text box. This text is visible in the content container on the Create Transfer Request: Request Details page.
15. Save your changes.

## **Assigning Rule Names to User Responsibilities**

After defining rule names in the IA: iAssets Rule Name profile option, you must assign each rule name to a user responsibility. Every Oracle iAssets user responsibility and Oracle iAssets approver responsibility must be assigned a rule name. Otherwise, when users log into an Oracle iAssets responsibility, they will receive an error message and will be unable to proceed.

---

# Using Oracle iAssets

This chapter covers the following topics:

- Using Oracle iAssets

## Using Oracle iAssets

You can use Oracle iAssets to search for assets or initiate a transfer request.

### Related Topics

Oracle iAssets Home Page, page 3-1

Using iAssets to Search for Assets, page 3-1

Viewing Saved Requests, page 3-2

Creating an Asset List, page 3-2

Viewing Asset Details, page 3-2

Create Transfer Request: Request Details, page 3-2

Create Transfer Request: Releasing Details, page 3-3

Create Transfer Request: Destination Details, page 3-3

### Oracle iAssets Home Page

The Oracle iAssets home page opens when you log into Oracle iAssets. On this page is a list of the following:

- Notifications: Notifications alert you to events that are pending your approval.
- Saved Asset Lists and Requests: This table lists the five most recent lists and requests you have saved previously.

From this page, you can also use the tabs to search for assets or view saved requests.

### Using iAssets to Search for Assets

#### Simple Search

Use the Simple Search page to search for assets. You must enter at least one of the search criteria listed on the simple search page, but can enter as many as you like. The more information you enter, the more precise your search results will be.

## Advanced Search

The Advanced Search page allows you to enter more specific information about assets than does the Simple Search page. You can search on any of the fields listed on the page, as well as add additional fields on which to conduct your search by choosing additional fields from the Add Another list. You can also narrow your search for each field. For example, if you search by asset number, you can search for a specific asset number, or an asset number that contains, starts with, or ends with a particular set of numbers.

## Viewing Saved Requests

From the Saved Requests page, you can search for your saved requests by request number, requester, preparer, or purpose.

## Creating an Asset List

You create an asset list by searching for assets and adding them to an asset list. On the Asset List page, you can continue searching for additional assets, remove assets from the list, save the list for later use, or create a transfer request.

## Viewing Asset Details

This page contains details of the selected asset, including description, type, number of units, category, and whether the asset is owned or leased.

## Create Transfer Request: Request Details

This is the first step of the transfer request process. The following table shows the field and button names on this page, along with their descriptions:

Field or Button	Description
Preparer	This field shows the person who is logged into Oracle iAssets, and is always read only.
Requester	The person for whom this transfer request is being created. For example, the user may be submitting a request for his or her manager. The value defaults to the preparer.
Effective Transfer Date	You can enter a date in this field if it has been configured by the Oracle iAssets system administrator. You can enter the current date or a past date within the current fiscal year. Future dates are not allowed. If this field has not been configured by the iAssets system administrator, it is read only and always says Upon Approval.
Purpose	The reason for creating the transfer request. This field is required.

## Create Transfer Request: Releasing Details

This is the second step of the transfer request process. This page shows details of the request, and contains a Releasing Approver field. The releasing approver may be defaulted and may be required, based on how the iAssets system administrator has set up the approval rules.

**Note:** This step is applicable only if the approval type is set up to require a releasing approver.

### Releasing Details: Update Releasing Approver

This page appears when you choose the Update as Group option on the Create Transfer Request: Releasing Details page. From here you enter a single releasing approver to update the releasing approver for all assets in the asset list.

## Create Transfer Request: Destination Details

This is the third step of the transfer request process. This page shows request information at the top, and a table with updatable fields to enter the destination information. You can change the information in the Expense Account, Location, and Employee fields. You must change the information in at least one of these fields and enter a receiving approver.

**Note:** This step is applicable only if the approval type is set up to require a destination approver.

### Destination Details: Update Details

This page appears when you choose the Update as Group option on the Create Transfer Request: Destination Details page. From here you enter a single destination approver to update the destination approver for all assets in the asset list.

## Create Transfer Request: Review

This is the fourth and final step of the transfer request process. On this page, you can review the changes you have made through the transfer process. If you are not satisfied with the changes, you can click on the Back button to return to previous pages and make additional changes.

Each combination of releasing and destination approvers must contain a different transfer request number, so if your request contains more than one combination, the page will show multiple request numbers. If this request was based on a previously saved request, the original request number will be reused and new numbers will be generated for the new requests.

## iAssets Manager Home Page

The iAssets Manager home page opens when you log in the iAssets Manager responsibility. The iAssets Manager home page lists the latest ten pending or approved transfer requests by default. The iAssets manager can sort the requests by any of the columns on the home page, for example, by employee or location.

The iAssets manager can set the status of the approved asset lines to Post, Onhold, Review, and Rejected. Asset lines with a status other than Post are not picked up by the Post Asset Transfer Requests concurrent program. If the status of all the asset lines is set to Post in a transfer request, then the status of the transfer request is

set to Approved. If only some of the asset lines are set to Post then the transfer request status is set to Partially Approved. The Post Asset Transfer Requests program will process asset lines with a status of Post as long as the Transfer Request status is either Approved or Partially Approved.

## Transfer Request Page

From the iAssets home page, the iAssets Manager can click on any of the listed requests to view the request details listed on the Transfer Request page. If the request header has a status of Approved, then further action is required by the iAssets Manager.

The iAssets Manager can view the releasing details by clicking on the Show link next to each asset number or by clicking on the Show All Details link found at the top of the table. The iAssets Manager can update the receiving expense account, receiving location, transaction date, status, and note.

The iAssets Manager can set the status of the request to:

- Post
- On Review
- Rejected
- On Hold

The iAssets Manager cannot set the asset line status to New, Error, Posted, or Pending.

If all the asset lines are set to Post then the request header status becomes Post. If all the asset lines are set to Rejected then the request header status becomes Rejected. If some asset lines are set to Post then the request header status becomes Partial Post. The iAssets Manager cannot set the request header status. This is set automatically based on the status of the asset lines.

The iAssets Manager can also approve multiple requests at once by selecting more than one request from the home page. In this case, the Transfer request will display the request number and the total number of requests (for example, Request 1 of 3). After completing work on the first request the iAssets Manager clicks the Next button to go to the next request.

## Update Assets as Group Page

If the receiving information is common across the asset lines, the iAssets Manager can update multiple asset lines in a single action by selecting all of the assets and clicking the Update as Group button. The iAssets Manager can update the Status, Transaction Date, Employee, Note, Expense Account, and Location.

## Requests Page

This page allows the iAssets manager to search for transfer requests by Request Number, Requestor, Preparer, Purpose, Creation Date, and Status, such as Approved, Rejected, Pending, or Completed with Errors.

## Schedule Request Page

From the Schedule menu, choose Post Asset Transfer Requests to run this program. You must enter a value for the Book parameter using the list of values. Follow the steps to schedule your request. You can review the request before submitting it.

---

# Oracle iAssets Profile Options

This appendix covers the following topics:

- Profile Options in Oracle iAssets

## Profile Options in Oracle iAssets

During your implementation, you set a value for each user profile option in Oracle iAssets to specify how Oracle iAssets controls access to and processes data.

You may also have additional user profile options on your system that are specific to applications other than Oracle iAssets.

Generally, your system administrator sets and updates profile values. The *Oracle Applications System Administration Reference Manual* contains more information on profile options, including the internal names of each Oracle iAssets profile option.

Oracle iAssets allows you to govern the behavior of many of your forms using user profile options. Your system administrator sets many of these user profile option values for you at the Application, Responsibility, or User Level. The values that you enter for these options at the user level supersede the preset values that your system administrator has entered for you for these options.

## Setup Profile Options Summary

The table below indicates whether you (the "User") can view or update the profile option and at which System Administrator levels the profile options can be updated: at the user, responsibility, application, or site levels.

A "Required" profile option requires you to provide a value. An "Optional" profile option already provides a default value, so you only need to change it if you don't want to accept the default. In the following table, the column User Access applies to any user without system administrator privileges. The next columns, System Admin Access: User, System Admin Access: Resp, System Admin Access: App, and System Admin Access: Site, refer to a user with System Administrator privileges.

Profile Option2	Value	Default	User Access	System Admin Access: User	System Admin Access: Responsibility	System Admin Access: Application	System Admin Access: Site
IA: iAssets Rule Name	Required	No default	No Access	No Access	Update	No Access	No Access
IA: iAssets System Administrator	Optional	System Administrator Only	View Only	Update	Update	Update	Update
IA: Print Debug	Optional	No default	No Access	Update	Update	Update	No Access

## Setting Up Profile Options

This section lists each user profile option in Oracle Assets. For each user profile option, it gives a brief overview of how Oracle Assets uses that user profile, and tells you which level to use to set or update it.

### IA: iAssets Rule Name Profile Option

Each rule must have a rule name defined in the IA: iAssets Rule Name profile option. Once the rule name is assigned to a responsibility, the responsibility is governed by the controls and options set up in that rule. This profile option must be set at the responsibility level.

**Note:** The IA: Assets Rule ID profile option is automatically populated based on the value you enter for the IA: iAssets Rule Name profile option. You cannot update the IA: Assets Rule ID profile option.

### IA: iAssets System Administrator

This profile option is used to indicate who has ownership of the requests submitted at the different levels. If this profile option is not set, the default System Administrator (SYSADMIN) will have the ownership of all the requests. The standard Workflow Status Monitor may be used to monitor the iAssets requests of which the corresponding system administrator has the ownership.

### IA: Print Debug

Indicates whether debug tracing messages are stored in the standard Workflow Status Monitor and printed in concurrent program log files. This profile option is used by Support as a tool to identify a problem with the code.

- **Yes:** Enables printing of debug messages
- **No:** Disables printing of debug messages
- **(No Value):** Equivalent to No

This profile option is visible to the System Administrator and updatable at the application, responsibility, and user levels.

## **Related Topics**

Personal Profile Values Window, *Oracle Applications User's Guide*

Overview of Setting User Profiles, *Oracle Applications System Administrator's Guide*

Examples of User Profile Options, *Oracle Applications System Administrator's Guide*



---

# Index

## A

---

advanced search, 1-1  
AME, 2-4  
approval rules  
    user-definable, 1-3  
asset search, 1-1  
asset transfers, 1-2

## C

---

custom approval rules  
    setting up, 2-4

## D

---

defining jobs, 2-3

## E

---

employees  
    entering new, 2-3

## H

---

Human Resources  
    integration with, 1-3

## I

---

IA: iAssets Rule Name profile option  
    setting up, A-2  
IA: iAssets System Administrator profile option  
    setting up, A-2  
IA: Print Debug profile option  
    setting up, A-2  
iAssets Manager responsibility, 1-2, 1-3  
iAssets manager role, 1-3  
iAssets responsibilities, 1-2  
iAssets rules  
    defining, 2-4  
iAssets security, 1-2  
iAssets Setup Administrator responsibility, 1-2  
iAssets User responsibility, 1-2  
integration with Human Resources, 1-3

## J

---

jobs  
    defining, 2-3

## O

---

Oracle Assets  
    setting up, 2-2  
Oracle iAssets  
    overview, 1-1  
organizations  
    creating, 2-3

## P

---

People window, 2-3  
profile options  
    IA: iAssets Rule Name, A-2  
    IA: iAssets System Administrator, A-2  
    IA: Print Debug, A-2  
    setting up, 2-4  
    summary, A-1

## R

---

related product setup steps, 2-1  
responsibilities, 1-2  
    iAssets Manager, 1-2, 1-3  
    iAssets Setup Administrator, 1-2  
    iAssets User, 1-2  
rules  
    assigning to responsibilities, 2-6  
    assigning to user responsibilities, 2-4  
    defining, 2-4, 2-5  
    searching for, 2-4  
    setting up, 2-4

## S

---

searching for assets, 1-1  
security, 1-2  
seeded responsibilities, 1-2  
setting up  
    employees, 2-3  
    organizations, 2-3  
    overview, 2-1

setting up Oracle Assets, 2-2  
setting up rules, 2-4  
setup  
    Oracle Assets, 2-2  
    Oracle Human Resources, 2-2  
setup checklist, 2-2  
simple search, 1-1

## **T**

---

transferring assets, 1-2

## **U**

---

user-definable approval rules, 1-3

## **W**

---

windows  
    People, 2-3