Oracle® iAssets

User Guide

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle iAssets User Guide.*

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

- The principles and customary practices of your business area.
- Computer desktop application usage and terminology

If you have never used Oracle Applications, we suggest you attend one or more of the Oracle Applications training classes available through Oracle University.

See Related Information Sources on page viii for more Oracle E-Business Suite product information.

Deaf/Hard of Hearing Access to Oracle Support Services

To reach Oracle Support Services, use a telecommunications relay service (TRS) to call Oracle Support at 1.800.223.1711. An Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process. Information about TRS is available at http://www.fcc.gov/cgb/consumerfacts/trs.html, and a list of phone numbers is available at http://www.fcc.gov/cgb/dro/trsphonebk.html.

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Structure

Related Information Sources

This document is included on the Oracle Applications Document Library, which is supplied in the Release 12 DVD Pack. You can download soft-copy documentation as PDF files from the Oracle Technology Network at http://otn.oracle.com/documentation, or you can purchase hard-copy documentation from the Oracle Store at http://oraclestore.oracle.com. The Oracle E-Business Suite Documentation Library Release 12 contains the latest information, including any documents that have changed significantly between releases. If substantial changes to this book are necessary, a revised version will be made available on the online documentation CD on Oracle *MetaLink*.

If this guide refers you to other Oracle Applications documentation, use only the Release 12 versions of those guides.

For a full list of documentation resources for Oracle Applications Release 12, see Oracle Applications Documentation Resources, Release 12, Oracle*MetaLink* Document 394692.1.

Online Documentation

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

- **PDF** - PDF documentation is available for download from the Oracle Technology Network at http://otn.oracle.com/documentation.

- **Online Help** - Online help patches (HTML) are available on Oracle*MetaLink*.

- **Oracle MetaLink Knowledge Browser** - The Oracle*MetaLink* Knowledge Browser lets you browse the knowledge base, from a single product page, to find all documents for that product area. Use the Knowledge Browser to search for release-specific information, such as FAQs, recent patches, alerts, white papers, troubleshooting tips, and other archived documents.

- **Oracle eBusiness Suite Electronic Technical Reference Manuals -** Each Electronic Technical 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 and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*MetaLink.*

Related Guides

You should have the following related books on hand. Depending on the requirements of your particular installation, you may also need additional manuals or guides.

Oracle Application Framework Personalization Guide

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

> **Important:** Oracle iAssets does not contain any end-user personalizable regions, and there are no special considerations that you need to be aware of when creating administrator-level personalizations of its regions or pages. For general information about how to create personalizations, refer to the Oracle Application Framework Personalization Guide.

Oracle Applications Concepts:

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle Applications architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle Applications. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Diagnostics User's Guide

This manual contains information on implementing, administering, and developing diagnostics tests in the Oracle E-Business Suite Diagnostics framework.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes the high level service enablement process, explaining how users can browse and view the integration interface definitions and services residing in Oracle Integration Repository.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains how integration repository administrators can manage and administer the service enablement process (based on the service-oriented architecture) for both native packaged public integration interfaces and composite services (BPEL type). It also describes how to invoke Web services from Oracle E-Business Suite by employing the Oracle Workflow Business Event System; how to manage Web service security; and how to monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway Developer's Guide

This guide describes how system integration developers can perform end-to-end service integration activities. These include orchestrating discrete Web services into meaningful end-to-end business processes using business process execution language (BPEL), and deploying BPEL processes at run time.

It also explains in detail how to invoke Web services using the Service Invocation Framework. This includes defining Web service invocation metadata, invoking Web services, managing errors, and testing the Web service invocation.

Oracle Workflow Client Installation Guide

This guide describes how to install the Oracle Workflow Builder and Oracle XML Gateway Message Designer client components for Oracle E-Business Suite.

Oracle Applications Flexfields Guide

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

Oracle Applications Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle Applications. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle Applications Release 12, or as part of an upgrade from Release 11*i* to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

Oracle Applications System Administrator's Guide Documentation Set

This documentation set provides planning and reference information for the Oracle Applications System Administrator. *Oracle Applications System Administrator's Guide - Configuration* contains information on system configuration steps, including defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help. *Oracle Applications System Administrator's Guide - Maintenance* provides information for frequent tasks such as monitoring your system with Oracle Applications Manager, administering Oracle E-Business Suite Secure Enterprise Search, managing concurrent managers and reports, using diagnostic utilities including logging, managing profile options, and using alerts. *Oracle Applications System Administrator's Guide - Security* describes User Management, data security, function security, auditing, and security configurations.

Oracle Applications Upgrade Guide: Release 11i to Release 12:

This guide provides information for DBAs and Applications Specialists who are responsible for upgrading a Release 11i Oracle Applications system (techstack and products) to Release 12. In addition to information about applying the upgrade driver, it outlines pre-upgrade steps and post-upgrade steps, and provides descriptions of product-specific functional changes and suggestions for verifying the upgrade and reducing downtime.

Oracle Applications User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle Applications. This guide also includes information on setting user profiles, as well as running and reviewing concurrent requests.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Financials and Oracle Procurement Functional Upgrade Guide: Release 11i to

Release 12:

This guides provides detailed information about the functional impacts of upgrading Oracle Financials and Oracle Procurement products from Release 11i to Release 12. This guide supplements the Oracle Applications Upgrade Guide: Release 11i to Release 12.

Oracle Financials Concepts Guide:

This guide describes the fundamental concepts of Oracle Financials. The guide is intended to introduce readers to the concepts used in the applications, and help them compare their real world business, organization, and processes to those used in the applications.

Oracle Financials Glossary:

The glossary includes definitions of common terms that are shared by all Oracle Financials products. In some cases, there may be different definitions of the same term for different Financials products. If you are unsure of the meaning of a term you see in an Oracle Financials guide, please refer to the glossary for clarification. You can find the glossary in the online help or in the *Oracle Financials Implementation Guide*.

Oracle Financials Implementation Guide:

This guide provides information on how to implement the Oracle Financials E-Business Suite. It guides you though setting up your organizations, including legal entities, and their accounting, using the Accounting Setup Manager. It covers intercompany accounting and sequencing of accounting entries, and it provides examples.

Oracle Assets User Guide:

This guide provides you with information on how to implement and use Oracle Assets. Use this guide to understand the implementation steps required for application use, including defining depreciation books, depreciation method, and asset categories. It also contains information on setting up assets in the system, maintaining assets, retiring and reinstating assets, depreciation, group depreciation, accounting and tax accounting, budgeting, online inquiries, impairment processing, and Oracle Assets reporting. The guide explains using Oracle Assets with Multiple Reporting Currencies (MRC). This guide also includes a comprehensive list of profile options that you can set to customize application behavior.

Oracle Human Resources Management Systems Implementation Guide

Learn about the setup procedures you need to carry out in order to implement Oracle HRMS successfully in your enterprise.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

1

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 1-3.

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.

2

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 the 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:

Step No.	Required	Step
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 No.	Required	Step
Step 2	Conditionally Required	**Defining a Job.** 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: Defining a Job, *Managing Your Workforce Using Oracle HRMS*. **Context:** Perform this step once for each job.
Step 3	Required	**Enter employees.** This step is required to define employees and supervisors. See: Entering a New Person, *Managing Your Workforce Using Oracle HRMS*. **Context:** Perform this step once for each Oracle iAssets user.
Step 4	Conditionally Required	**Create an organization. The organization must have an organization classification of Company Cost Center.** 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: Creating an Organization, *Using Oracle HRMS - The Fundamentals*. **Context:** Perform this step once per organization.

Step No.	Required	Step
Step 6	Optional	**Set up custom approval rules in AME.** See: Approval Rules *(Implementing Oracle Approvals Management)*. **Context:** Perform this step once per installation.
Oracle iAssets Setup Steps		
Step 5	Required	**Set Up Rules.** See: Defining Oracle iAssets Transfer Rules, page 2-4. **Context:** Perform this step when ever you need to define rules.
Step 6	Required	**Set up profile options.** See: Profile Options and Profile Option Categories Overview, page A-1. **Context:** Perform this step when ever you need to define rule names.
Step 7	Required	**Assign rule names to user responsibilities.** See: Assigning Rule Names to User Responsibilities, page 2-7. **Context:** Perform this step when ever you need to assign rule names to user responsibilities.

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 2-5

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. A user can also enter a future date but the transfer will be posted only when the period in which this date falls is opened in the asset book.

   - 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.

3

Using Oracle iAssets

This chapter covers the following topics:

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 3-2

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 3-4

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.

Field or Button	Description
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. **Note:** If you do not enter a date in this field, the value defaults to the system date. When the system date is later than the current open period of the asset book, then the transfer will be treated as a future period transaction. The future period transaction can be posted only when the period in which this date falls is opened in the asset book.
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.

A

Oracle iAssets Profile Options and Profile Option Categories

This appendix covers the following topics:

- Profile Options and Profile Option Categories Overview
- Profile Option Category and Profile Options Descriptions

Profile Options and Profile Option Categories Overview

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

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide - Maintenance*

Profile options are grouped into one or more profile option categories enabling you to view only the profile options that pertain to your application or function.

Oracle iAssets Categories

- Debug
- Security
- Setup

Oracle iAssets Profile Options

- IA: iAssets Rule Name
- IA: iAssets System Administrator
- IA: Print Debug

Profile Option Category and Profile Options Descriptions

This section describes profile options by category.

The tables in this section provide profile option information as follows:

- The Default column displays either the default profile option value in italics, or No Default if none exists.
- The User Access column indicates whether you can view or update the profile option.
- The System Administration: Site, Application, Responsibility, and User columns indicate at which levels the system administrator can update these profile options.

The key for each table is:

- Update: You can update the profile option.
- View Only: You can view the profile option but cannot change it.
- No Access: You cannot view or change the profile option.

Debug Category

The table below lists the profile options that control debugging and diagnostic features.

Debug Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
IA: Print Debug	No default	No access	No access	Update	Update	Update

IA: Print Debug

Indicates whether debug tracing messages are stored in the standard Workflow Status Montitor 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.

Security Category

The table below lists the profile options that control security.

Security Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
IA: iAssets Rule Name	No default	No access	No access	No access	Update	No access

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.

Setup Category

The table below lists the profile options that control security.

Setup Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
IA: iAssets System Administrator	System Administrator	View Only	Update	Update	Update	Update

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.

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*

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