

Oracle® iAssets

User Guide

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Oracle iAssets User Guide, Release 12.2

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Send Us Your Comments

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

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If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

Preface

Intended Audience

Welcome to Release 12.2 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 E-Business Suite, we suggest you attend one or more of the Oracle E-Business Suite training classes available through Oracle University.

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Structure

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

Related Information Sources

This book is included in the Oracle E-Business Suite Documentation Library, which is supplied in the Release 12.2 Media Pack. If this guide refers you to other Oracle E-Business Suite documentation, use only the latest Release 12.2 versions of those guides.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **PDF Documentation** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual** - The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

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 E-Business Suite Upgrade Guide: Release 12.0 and 12.1 to 12.2:

This guide provides information for DBAs and Applications Specialists who are responsible for upgrading Release 12.0 and 12.1 Oracle E-Business Suite system (techstack and products) to Release 12.2. 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 Advanced Global Intercompany System User's Guide:

This guide describes the self service application pages available for Intercompany users. It includes information on setting up intercompany, entering intercompany transactions, importing transactions from external sources and generating reports.

Oracle Advanced Collections User Guide:

This guide describes how to use the features of Oracle Advanced Collections to manage your collections activities. It describes how collections agents and managers can use Oracle Advanced Collections to identify delinquent customers, review payment history and aging data, process payments, use strategies and dunning plans to automate the collections process, manage work assignments, and handle later-stage delinquencies.

Oracle Advanced Collections Implementation Guide:

This guide describes how to configure Oracle Advanced Collections and its integrated products. It contains the steps required to set up and verify your implementation of Oracle Advanced Collections.

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 Bill Presentment Architecture User's Guide:

This guide provides you information on using Oracle Bill Presentment Architecture. Consult this guide to create and customize billing templates, assign a template to a rule and submit print requests. This guide also provides detailed information on page references, seeded content items and template assignment attributes.

Oracle Cash Management User Guide:

This guide describes how to use Oracle Cash Management to clear your receipts, as well as reconcile bank statements with your outstanding balances and transactions. This manual also explains how to effectively manage and control your cash cycle. It provides comprehensive bank reconciliation and flexible cash forecasting.

Oracle Credit Management User Guide:

This guide provides you with information on how to use Oracle Credit Management. This guide includes implementation steps, such as how to set up credit policies, as well as details on how to use the credit review process to derive credit recommendations that comply with your credit policies. This guide also includes detailed information about the public application programming interfaces (APIs) that you can use to extend Oracle Credit Management functionality.

Oracle Customer Data Librarian User Guide:

This guide describes how to use Oracle Customer Data Librarian to establish and maintain the quality of the Trading Community Architecture Registry, focusing on consolidation, cleanliness, and completeness. Oracle Customer Data Librarian has all of the features in Oracle Customers Online, and is also part of the Oracle Customer Data

Management product family.

Oracle Customer Data Librarian Implementation Guide:

This guide describes how to implement Oracle Customer Data Librarian. As part of implementing Oracle Customer Data Librarian, you must also complete all the implementation steps for Oracle Customers Online.

Oracle Customers Online User Guide:

This guide describes how to use Oracle Customers Online to view, create, and maintain your customer information. Oracle Customers Online is based on Oracle Trading Community Architecture data model and functionality, and is also part of the Oracle Customer Data Management product family.

Oracle Customers Online Implementation Guide:

This guide describes how to implement Oracle Customers Online.

Oracle E-Business Suite Multiple Organizations Implementation Guide:

This guide describes the multiple organizations concepts in Oracle E-Business Suite. It describes in detail on setting up and working effectively with multiple organizations in Oracle E-Business Suite.

Oracle E-Business Tax User Guide:

This guide describes the entire process of setting up and maintaining tax configuration data, as well as applying tax data to the transaction line. It describes the entire regime-to-rate setup flow of tax regimes, taxes, statuses, rates, recovery rates, tax jurisdictions, and tax rules. It also describes setting up and maintaining tax reporting codes, fiscal classifications, tax profiles, tax registrations, configuration options, and third party service provider subscriptions. You also use this manual to maintain migrated tax data for use with E-Business Tax.

Oracle E-Business Tax Implementation Guide:

This guide provides a conceptual overview of the E-Business Tax tax engine, and describes the prerequisite implementation steps to complete in other applications in order to set up and use E-Business Tax. The guide also includes extensive examples of setting up country-specific tax requirements.

Oracle E-Business Tax Reporting Guide:

This guide explains how to run all tax reports that make use of the E-Business Tax data extract. This includes the Tax Reporting Ledger and other core tax reports, country-specific VAT reports, and Latin Tax Engine reports.

Oracle E-Business Tax: Vertex Q-Series and Taxware Sales/Use Tax System Implementation Guide

This guide explains how to setup and use the services of third party tax service providers for US Sales and Use tax. The tax service providers are Vertex Q-Series and Taxware Sales/Use Tax System. When implemented, the Oracle E-Business Tax service subscription calls one of these tax service providers to return a tax rate or amount

whenever US Sales and Use tax is calculated by the Oracle E-Business Tax tax engine. This guide provides setup steps, information about day-to-day business processes, and a technical reference section.

Oracle Embedded Data Warehouse User Guide:

This guide describes how to use Embedded Data Warehouse reports and workbooks to analyze performance.

Oracle Embedded Data Warehouse Implementation Guide:

This guide describes how to implement Embedded Data Warehouse, including how to set up the intelligence areas.

Oracle Embedded Data Warehouse Install Guide:

This guide describes how to install Embedded Data Warehouse, including how to create database links and create the end user layer (EUL).

Oracle Financial Accounting Hub Implementation Guide:

This guide provides detailed implementation information that leverages the features of Oracle Subledger Accounting to generate accounting.

Oracle Financial Services Reference Guide:

This guide provides reference material for Oracle Financial Services applications in Release 12, such as Oracle Transfer Pricing, and includes technical details about application use as well as general concepts, equations, and calculations.

Oracle Financial Services Implementation Guide:

This guide describes how to set up Oracle Financial Services applications in Release 12.

Oracle Financial Services Reporting Administration Guide:

This guide describes the reporting architecture of Oracle Financial Services applications in Release 12, and provides information on how to view these reports.

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 E-Business Suite Upgrade Guide: Release 12.0 and 12.1 to 12.2*.

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 Country-Specific Installation Supplement:

This guide provides general country information, such as responsibilities and report

security groups, as well as any post-install steps required by some countries.

Oracle Financials for the Americas User Guide:

This guide describes functionality developed to meet specific business practices in countries belonging to the Americas region. Consult this user guide along with your financial product user guides to effectively use Oracle Financials in your country.

Oracle Financials for Asia/Pacific User Guide:

This guide describes functionality developed to meet specific business practices in countries belonging to the Asia/Pacific region. Consult this user guide along with your financial product user guides to effectively use Oracle Financials in your country.

Oracle Financials for Europe User Guide:

This guide describes functionality developed to meet specific business practices in countries belonging to the European region. Consult this user guide along with your financial product user guides to effectively use Oracle Financials in your country.

Oracle Financials for India User's Guide:

This guide provides information on how to use Oracle Financials for India. Use this guide to learn how to create and maintain setup related to India taxes, defaulting and calculation of taxes on transactions. This guide also includes information about accounting and reporting of taxes related to India.

Oracle Financials for India Implementation Guide:

This guide provides information on how to implement Oracle Financials for India. Use this guide to understand the implementation steps required for application use, including how to set up taxes, tax defaulting hierarchies, set up different tax regimes, organization and transactions.

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 through 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 Financials RXi Reports Administration Tool User Guide:

This guide describes how to use the RXi reports administration tool to design the content and layout of RXi reports. RXi reports let you order, edit, and present report information to better meet your company's reporting needs.

Oracle General Ledger Implementation Guide:

This guide provides information on how to implement Oracle General Ledger. Use this guide to understand the implementation steps required for application use, including how to set up Accounting Flexfields, Accounts, and Calendars.

Oracle General Ledger Reference Guide

This guide provides detailed information about setting up General Ledger Profile Options and Applications Desktop Integrator (ADI) Profile Options.

Oracle General Ledger User's Guide:

This guide provides information on how to use Oracle General Ledger. Use this guide to learn how to create and maintain ledgers, ledger currencies, budgets, and journal entries. This guide also includes information about running financial reports.

Oracle Incentive Compensation Implementation Guide:

This guide provides Compensation Administrators with guidance during implementation of Oracle Incentive Compensation. The procedures are presented in the recommended order that they should be performed for successful implementation. Appendixes are included that describe system profiles, lookups, and other useful information.

Oracle Incentive Compensation User Guide:

This guide helps Compensation Managers, Compensation Analysts, and Plan administrators to manage Oracle Incentive Compensation on a day-to-day basis. Learn how to create and manage rules hierarchies, create compensation plans, collect transactions, calculate and pay commission, and use Sales Credit Allocation.

Oracle Internet Expenses Implementation and Administration Guide:

This book explains in detail how to configure Oracle Internet Expenses and describes its integration with other applications in the E-Business Suite, such as Oracle Payables and Oracle Projects. Use this guide to understand the implementation steps required for application use, including how to set up policy and rate schedules, credit card policies, audit automation, and the expenses spreadsheet. This guide also includes detailed information about the client extensions that you can use to extend Oracle Internet Expenses functionality.

Oracle iAssets User Guide

This guide provides information on how to implement and use Oracle iAssets. Use this guide to understand the implementation steps required for application use, including setting up Oracle iAssets rules and related product setup steps. It explains how to define approval rules to facilitate the approval process. It also includes information on using the Oracle iAssets user interface to search for assets, create self-service transfer requests and view notifications.

Oracle iProcurement Implementation and Administration Guide:

This manual describes how to set up and administer Oracle iProcurement. Oracle iProcurement enables employees to requisition items through a self-service, Web interface.

Oracle iReceivables Implementation Guide:

This guide provides information on how to implement Oracle iReceivables. Use this guide to understand the implementation steps required for application use, including how to set up and configure iReceivables, and how to set up the Credit Memo Request workflow. There is also a chapter that provides an overview of major features available in iReceivables.

Oracle iSupplier Portal User Guide:

This guide contains information on how to use Oracle iSupplier Portal to enable secure transactions between buyers and suppliers using the Internet. Using Oracle iSupplier Portal, suppliers can monitor and respond to events in the procure-to-pay cycle.

Oracle iSupplier Portal Implementation Guide:

This guide contains information on how to implement Oracle iSupplier Portal and enable secure transactions between buyers and suppliers using the Internet.

Oracle Loans User Guide:

This guide describes how to set up and use Oracle Loans. It includes information on how to create, approve, fund, amortize, bill, and service extended repayment plan and direct loans.

Oracle Partner Management Implementation and Administration Guide:

This guide helps Vendor administrators to set up and maintain relationships and programs in the Partner Management application. The main areas include setting up the partner and channel manager dashboards, partner setup, partner programs and enrollment, opportunity and referral management, deal registration, special pricing management, and partner fund management.

Oracle Partner Management Vendor User Guide:

This guide assists vendor users in using Partner Management on a daily basis. This includes interaction with the partner and channel manager dashboards, working with partners and partner programs, managing opportunities and referrals, registering deals, and working with special pricing and partner funds.

Oracle Payables User's Guide:

This guide describes how to use Oracle Payables to create invoices and make payments. In addition, it describes how to enter and manage suppliers, import invoices using the Payables open interface, manage purchase order and receipt matching, apply holds to invoices, and validate invoices. It contains information on managing expense reporting, procurement cards, and credit cards. This guide also explains the accounting for Payables transactions.

Oracle Payables Implementation Guide:

This guide provides you with information on how to implement Oracle Payables. Use this guide to understand the implementation steps required for how to set up suppliers, payments, accounting, and tax.

Oracle Payables Reference Guide:

This guide provides you with detailed information about the Oracle Payables open interfaces, such as the Invoice open interface, which lets you import invoices. It also includes reference information on purchase order matching and purging purchasing information.

Oracle Payments Implementation Guide:

This guide describes how Oracle Payments, as the central payment engine for the Oracle E-Business Suite, processes transactions, such as invoice payments from Oracle Payables, bank account transfers from Oracle Cash Management, and settlements against credit cards and bank accounts from Oracle Receivables. This guide also describes how Oracle Payments is integrated with financial institutions and payment systems for receipt and payment processing, known as funds capture and funds disbursement, respectively. Additionally, the guide explains to the implementer how to plan the implementation of Oracle Payments, how to configure it, set it up, test transactions, and how use it with external payment systems.

Oracle Payments User's Guide:

This guide describes how Oracle Payments, as the central payment engine for the Oracle E-Business Suite, processes transactions, such as invoice payments from Oracle Payables, bank account transfers from Oracle Cash Management, and settlements against credit cards and bank accounts from Oracle Receivables. This guide also describes to the Payment Administrator how to monitor the funds capture and funds disbursement processes, as well as how to remedy any errors that may arise.

Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout:

This guide contains necessary information for customers implementing remote catalog content on a supplier's Web site or on Oracle Exchange.

Oracle Procurement Contracts Online Help:

This guide is provided as online help only from the Oracle Procurement Contracts application and includes information about creating and managing your contract terms library.

Oracle Procurement Contracts Implementation and Administration Guide:

This guide describes how to set up and administer Oracle Procurement Contracts. Oracle Procurement Contracts enables employees to author and maintain complex contracts through a self-service, Web interface.

Oracle Public Sector Financials User Guide:

This guide describes how to set up and administer Oracle Public Sector Advanced Features. It describes Encumbrance Reconciliation Reports, GASB 34/35 Asset Accounting, and Funds Available Enhancements.

Oracle Purchasing User's Guide:

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This

guide also describes how to manage your supply base through agreements, sourcing rules, and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

Oracle Receivables User Guide:

This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

Oracle Receivables Implementation Guide:

This guide provides you with information on how to implement Oracle Receivables. Use this guide to understand the implementation steps required for application use, including how to set up customers, transactions, receipts, accounting, tax, and collections. This guide also includes a comprehensive list of profile options that you can set to customize application behavior.

Oracle Receivables Reference Guide:

This guide provides you with detailed information about all public application programming interfaces (APIs) that you can use to extend Oracle Receivables functionality. This guide also describes the Oracle Receivables open interfaces, such as AutoLockbox which lets you create and apply receipts and AutoInvoice which you can use to import and validate transactions from other systems. Archiving and purging Receivables data is also discussed in this guide.

Oracle Sourcing Implementation and Administration Guide:

This guide contains information on how to implement Oracle Sourcing to enable participants from multiple organizations to exchange information, conduct bid and auction processes, and create and implement buying agreements. This allows professional buyers, business experts, and suppliers to participate in a more agile and accurate sourcing process.

Oracle Subledger Accounting Implementation Guide:

This guide provides setup information for Oracle Subledger Accounting features, including the Accounting Methods Builder. You can use the Accounting Methods Builder to create and modify the setup for subledger journal lines and application accounting definitions for Oracle subledger applications. This guide also discusses the reports available in Oracle Subledger Accounting and describes how to inquire on subledger journal entries.

Oracle Supplier Scheduling User's Guide:

This guide describes how you can use Oracle Supplier Scheduling to calculate and maintain planning and shipping schedules and communicate them to your suppliers.

Oracle iProcurement Implementation and Administration Guide:

This manual describes how to set up and administer Oracle iProcurement. Oracle iProcurement enables employees to requisition items through a self-service, Web interface.

Oracle Procurement Contracts Implementation and Administration Guide:

This manual describes how to set up and administer Oracle Procurement Contracts. Oracle Procurement Contracts enables employees to author and maintain complex contracts through a self-service, Web interface.

Oracle Trading Community Architecture User Guide:

This guide describes the Oracle Trading Community Architecture (TCA) and how to use features from the Trading Community Manager responsibility to create, update, enrich, and cleanse the data in the TCA Registry. It also describes how to use Resource Manager to define and manage resources.

Oracle Trading Community Architecture Administration Guide:

This guide describes how to administer and implement Oracle Trading Community Architecture (TCA). You set up, control, and manage functionality that affects data in the TCA Registry. It also describes how to set up and use Resource Manager to manage resources.

Oracle Trading Community Architecture Reference Guide:

This guide contains seeded relationship types, seeded Data Quality Management data, D&B data elements, Bulk Import interface table fields and validations, and a comprehensive glossary. This guide supplements the documentation for Oracle Trading Community Architecture and all products in the Oracle Customer Data Management family.

Oracle Trading Community Architecture Technical Implementation Guide:

This guide explains how to use the public Oracle Trading Community Architecture application programming interfaces (APIs) and develop callouts based on Oracle Workflow Business Events System (BES). For each API, this guide provides a description of the API, the PL/SQL procedure, and the Java method, as well as a table of the parameter descriptions and validations. For each BES callout, this guide provides the name of the logical entity, its description, and the ID parameter name. Also included are setup instructions and sample code.

Oracle U.S. Federal Financials User's Guide:

This guide describes the common concepts for an integrated financial management solution for federal agencies to comply with the requirements of the U.S. Federal government. It describes the product architecture and provides information on Budget Execution, Prompt Payment, Treasury payments, Third party payments, Interagency transactions, Receivables management, Federal reports, CCR Integration, and Year End Closing.

Oracle U.S. Federal Financials Implementation Guide:

This guide describes the common concepts for an integrated financial management solution for federal agencies. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot the Federal Financial application for the following functional areas: Sub Ledger Accounting, Budget Execution, Prompt Payment, Treasury payments, Third party payments, Interagency transactions, Receivables management, Federal reports, CCR Integration, and Year End Closing.

Oracle Projects Documentation Set

Oracle Projects Implementation Guide:

Use this guide to implement Oracle Projects. This guide also includes appendixes covering function security, menus and responsibilities, and profile options.

Oracle Project Costing User Guide:

Use this guide to learn detailed information about Oracle Project Costing. Oracle Project Costing provides the tools for processing project expenditures, including calculating their cost to each project and determining the General Ledger accounts to which the costs are posted.

Oracle Project Billing User Guide:

This guide shows you how to use Oracle Project Billing to define revenue and invoicing rules for your projects, generate revenue, create invoices, and integrate with other Oracle Applications to process revenue and invoices, process client invoicing, and measure the profitability of your contract projects.

Oracle Project Management User Guide:

This guide shows you how to use Oracle Project Management to manage projects through their lifecycles - from planning, through execution, to completion.

Oracle Project Portfolio Analysis User Guide:

This guide contains the information you need to understand and use Oracle Project Portfolio Analysis. It includes information about project portfolios, planning cycles, and metrics for ranking and selecting projects for a project portfolio.

Oracle Project Resource Management User Guide:

This guide provides you with information on how to use Oracle Project Resource Management. It includes information about staffing, scheduling, and reporting on project resources.

Oracle Grants Accounting Documentation

Oracle Grants Accounting User Guide:

This guide provides you with information about how to implement and use Oracle Grants Accounting. Use this guide to understand the implementation steps required for application use, including defining award types, award templates, allowed cost schedules, and burden set up. This guide also explains how to use Oracle Grants Accounting to track grants and funded projects from inception to final reporting.

Oracle Property Manager Documentation

Oracle Property Manager User Guide:

Use this guide to learn how to use Oracle Property Manager to create and administer properties, space assignments, and lease agreements.

Oracle Property Manager Implementation Guide:

Use this guide to learn how to implement Oracle Property Manager and perform basic setup steps such as setting system options and creating lookup codes, contacts, milestones, grouping rules, term templates, and a location hierarchy. This guide also describes the setup steps that you must complete in other Oracle applications before you can use Oracle Property Manager.

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.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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.

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.

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, <i>Oracle Assets User Guide</i> Context: Perform this step once per installation.
Oracle HRMS Setup Steps		

Step No.	Required	Step
Step 2	Conditionally Required	<p>Defining a Job.</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>Context: Perform this step once for each job.</p>
Step 3	Required	<p>Enter employees.</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>Context: Perform this step once for each Oracle iAssets user.</p>
Step 4	Conditionally Required	<p>Create an organization. The organization must have an organization classification of Company Cost Center.</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>Context: Perform this step once per organization.</p>

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

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.

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 3-2

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	<p>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.</p> <p>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.</p>
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 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 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.

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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