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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Installed Base Implementation Guide.*

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

Documentation Accessibility

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A Oracle Installed Base System Profile Options and Debug Information
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Related Information Sources

Oracle Asset Tracking User's Guide

Oracle Installed Base User's Guide

Oracle Inventory User's Guide

Oracle Field Service User's Guide

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.

1

Overview of Oracle Installed Base

This chapter covers the following topics:

- Summary of Oracle Installed Base
- Features of Oracle Installed Base
- Integration Points and Dependencies for Oracle Installed Base

Summary of Oracle Installed Base

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

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

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

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

Features of Oracle Installed Base

Functional Overview

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

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

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

Key features and functionality include the following:

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

Instance Maintenance

Oracle Installed Base provides you the ability to create, update, query, and copy

instances using Oracle Installed Base user interfaces and through the integration with other applications. These include Oracle applications such as:

- Oracle Service Contracts
- Oracle Field Service
- Oracle Depot Repair
- Oracle Complex Maintenance, Repair, and Overhaul
- Oracle Receiving
- Oracle Work in Process
- Oracle Inventory
- Oracle Process Manufacturing
- Oracle Projects
- Oracle Order Management
- Oracle Quoting
- Oracle Shipping
- Oracle Site Hub
- Oracle Purchasing
- Contact Center and the eBiz Center

Use Oracle Asset Tracking to create and maintain assets. Oracle Asset Tracking provides you with the ability to track the location, status, addresses, contacts, business party relationships, inter-instance relationships, extended pricing, instance attributes, and other item instance attributes.

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

Support for Inventory Transactions

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

Contact Center, and e-Biz Center.

> **Note:** Oracle strongly recommends that you set up the Inventory Installed Base tracking parameter at the item master level. You must select items as Trackable for all organizations.
>
> Similarly, you must set lot, locator, revision, serial, and others at the master level.

The *Oracle Installed Base User Guide* provides a comprehensive list of all transactions that Oracle Installed Base supports, including those that are triggered by Oracle Inventory.

Centralized Repository of Information

These are examples of information stored in the Oracle Installed Base centralized repository:

- Consolidated transactions history for an item instance

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

- Timestamp and version label history for an item instance

  Using the Item Instance History page, you can view the state of the attributes of an instance by specifying a date-time stamp or a version label. This feature provides valuable information regarding an item instance configuration at a specific time.

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

  Oracle Installed Base provides the ability to query transactions by date range, status, and transaction types across Oracle E-Business Suite applications. It pulls together information from multiple applications and presents it in a single, central user interface.

Multiple Party and Account Relationships

With Oracle Installed Base, you can relate an item instance to multiple entities called parties. The parties can be different party types. For example, an item instance may have been Sold To party A, but is now Owned By party B. It may be Shipped To party C, and so on. The entities may have type values such as Party, Vendor, Employee. For each party type, you can define relationship types such as Owner and Service Provider. Each party can have multiple accounts.

This feature supports the multiple business relationships required by business globalization and outsourcing requirements.

Configuration Support and Instance-to-Instance Relationships

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

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

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

Open Interface Mass Load and Mass Update Capabilities

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

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

System Grouping of Item Instances

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

Extended Attributes

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

Integration Points and Dependencies for Oracle Installed Base

Integration with the Oracle E-Business Suite

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

- Counters and Notes (update capabilities)
- Direct updates from Oracle Field Service and Oracle Complex Maintenance Repair, and Overhaul
- View and reference accessibility from multiple applications such as Oracle Contracts, Oracle Field Service, Oracle Depot Repair, and Oracle Customer Support
- Oracle Trading Community Architecture for querying parties and accounts and building item instance to party relationships
- Oracle Inventory (receiving and other inventory transactions)
- Oracle Order Management (shipping, fulfillment, and RMA receipts). Includes integrations with the Oracle Telecommunications Service Ordering (TSO) functionality as well as the Oracle Order Management Partner Ordering process.
- Oracle Assets (Oracle Asset Tracking-specific updates through mass additions
- Oracle Projects (Oracle Asset Tracking-specific updates to projects)
- Oracle Work in Process (move transactions, assembly completion, configuration support, and others)
- Oracle e-Biz Center & Contact Center. A new tab provided with Contact/e-Biz Center window enables direct access to Oracle Installed Base.
- Oracle Project Contracts (shipment transactions)
- Oracle Purchasing (inter-company drop shipment and PO adjustments)
- Trading Community Architecture (TCA) party for party and relationship

Note the following points with regard to integration with TCA and Oracle Quoting:

- When using the TCA merge routines with Oracle Installed Base records, Oracle recommends that the party merge be completed before the account merge. In addition, the internal party that is set up in the Oracle Installed Base parameter cannot be used in the merge. For details, refer to Setting Up Installation Parameters, page 2-15.

- When entering a quote, you can invoke the transaction detail to enter additional information for Oracle Installed Base. When the quote becomes an order, the transaction detail is copied against an Oracle Order Management order. This is processed when the order is shipped as described in the Oracle Order Management integration.

The application uses the Service Fulfillment Manager (SFM) event queue for communicating transactional updates from Oracle Inventory to Oracle Installed Base.

Inventory Receipt and Purchase Order Receipt

If an item is set up as trackable in Oracle Installed Base, then an inventory receipt such as miscellaneous receipt or PO receipt causes the creation or update of an Oracle Installed Base instance. At the time the inventory transaction happens, a message is sent to the SFM Event Queue. It is automatically dequeued and processed to update Oracle Installed Base.

For non-serialized items, if an instance already exists at the same subinventory location, then it is added to the quantity of the instance with the same subinventory location. If an instance for the same item subinventory location does not exist, then a new instance is created.

If an item is serial controlled at receipt or is predefined, then an instance is created for it with quantity of 1 with location in the subinventory location.

If an item is serial controlled at order issue, then it is treated as a non-serialized controlled item in inventory. The item receives a serial number at order-issue creation time only.

Inventory Transactions

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

> **Note:** Oracle strongly recommends that you set up the Inventory Installed Base tracking parameter at the item master level. You must select items as Trackable for all organizations.
>
> Similarly, you must set lot, locator, revision, serial, and others at the master level.

For an inventory transfer or move order transaction, the location of an instance is updated to reflect the new location for a serialized item. For a non-serialized item, the quantity of the instance at the From location is subtracted, and the quantity of the instance at the To location is increased by the quantity being moved. If the item is issued to a WIP job, then the location of the item reflects the WIP job number. If it is issued to an asset, then it reflects the asset number. If it is issued to a project/task, then

the location of the instance shows the project and task number. Refer to Oracle Asset Tracking documentation for more details.

The Oracle Inventory transactions associated with Oracle Installed Base appear in Appendix A, Oracle Transactions Interfacing with Oracle Installed Base, *Oracle Installed Base User's Guide*.

The WIP inventory-sourced transactions are described in further detail in WIP Integration, page 1-12.

Oracle Order Management Integration

The integration with Oracle Order Management is the only integration that implements the functionality of the Oracle Installed Base Transaction Details window. This includes RMA receipt, sales order shipment, and sales order fulfillment. The functionality of the Oracle Installed Base Transaction Details window is not supported for internal sales orders.

RMA Receipt

An RMA return receipt generates an inventory receipt material transaction in the Inventory application. If a serialized item never existed in Oracle Installed Base, then the RMA receipt creates a new instance with the location in inventory. For non-serialized items, first create the instance with the required quantity using the Oracle Installed Base user interface and then reference it in the RMA. If the instance exists in Oracle Installed Base, then this return can cause a change of location to inventory and other changes such as status and owner as specified in the transaction type setup used to process the transaction.

In the sales return line, installation detail can be invoked to specify additional details for this instance and other related instances for this update to Oracle Installed Base.

Oracle Installed Base supports the Order Management RMA fulfillment process for non-shippable items under specific terms and conditions. Important conditions include the following:

- The item must be flagged as Oracle Installed Base trackable.
- Instance Reference must be entered in the Transaction (Installation) Details window for Oracle Installed Base update.
- RMA - Oracle Installed Base interface workflow customizing is required.

Oracle Installed Base supports RMA fulfillment by one or more of the following events:

- Reduction in quantity (If the quantity is reduced to zero, then it is automatically expired.)
- Instance expiration

- Change in status
- Change in configuration relationship

Instance attributes are updated based on the associated transaction types in the transaction details window.

Refer to Use of Transaction Details, page 1-15 for information on the use of transaction detail. To use transaction detail, the transaction types being used have to be previously set up. Refer to Set Up Transaction Subtypes, page 2-35 for instructions to set up transaction types.

Sales Order Shipment

For an Oracle Installed Base trackable, shippable item, a shipping transaction generates an inventory issue transaction in the Oracle Inventory application.

For a serialized item already in inventory, this transaction causes a change of location and ownership, depending on the transaction type being used.

For items serialized at sales order issue, the first-time shipment transaction causes the creation of a new instance with the serial number. If it has trackable components, then the component instances and component-of configuration for these components are built as well.

For non-serialized items, the quantity is subtracted from the instance at the inventory location, and a new instance is created with the customer ownership and location.

Configuration Creation at Sales Order Shipment

Oracle Install Base supports the following Oracle Order Management integration based configurations:

- Assemble-to-order (ATO) models, configured item, ATO option class and components
- Pick-to-order (PTO) models, included item, PTO option class and components
- Kits and components items

It is important to note that items must be Oracle Install Base trackable, and non-shippable items must be fulfilled to be represented in a configuration.

BOM Based Configurations

Key Rule: Configurations are built only for a parent item instance with Quantity = 1.

Oracle Installed Base supports the creation of BOM based configurations at initial shipment. Component-of relationships are created between trackable parent and component instances.

Notes Regarding PTO and ATO Models

The creation of a PTO model is supported as in previous versions of Oracle Installed Base. At the time of sales order line processing, Oracle Configurator enables the selection of optional items to be put into the PTO model. As a result, additional sales order lines are created for the mandatory and optional items. If they are Oracle Installed

Base trackable, then at the time of sales order shipment, instances of the top model, the trackable components, and the component-of relationships are created in Oracle Installed Base. The PTO model need not be serialized controlled.

In all cases, at the sales order line for a sales order, installation detail can be invoked to specify additional details for this instance and other related instances, for this update to Oracle Installed Base. Refer to Use of Transaction Details, page 1-15 for information on the use of installation detail.

To use the installation detail, the transaction types being used have to be previously set up. Refer to Setting Up Transaction Subtypes, page 2-35 for instructions on setting up transaction types.

The creation of an ATO model is supported as well. At the time of sales order line processing, Configurator enables the selection of optional items to be put into the ATO model. Then a WIP job can be created for the configured item to be built in WIP. At the time of WIP assembly completion, the configured item instance and its configuration are created with the location in inventory. When it is shipped, the location and ownership will be changed to that of the customer. The ATO model need not be serialized controlled.

Sales Order Fulfillment

Oracle Installed Base supports sales order line fulfillment of shippable or non-shippable, Oracle Installed Base trackable items. Workflow customizing is required. Details are provided in subsequent sections.

Fulfillment of an order line invokes the Oracle Installed Base interface and appropriately creates or updates Oracle Installed Base item instances.

> **Note:** You can replace the Service Fulfillment Manager (SFM) queue with a concurrent program to process the MACD (Move, Add, Change and Disconnect) sales orders.
>
> Use the **CSI: Use Parallel Mode** profile option to indicate which approach (SFM or Concurrent) to use in order to process order lines in Oracle Installed Base. If you set the profile option value to Yes, the new concurrent program will process the transaction lines.
>
> Concurrent programs are:
>
> - IB Transaction Lines Import
> - IB Transaction Lines Import Worker
>
> The IB Transaction Lines Import concurrent program is a manager which batches the lines and assigns workers to process them. The number of workers will be up to the maximum that you specify in the concurrent program. Schedule the IB Transaction Lines Import concurrent program to run every minute. In case you want to retain processed data, the Purge option is provided. Use Oracle Installed Base

Admin responsibility to run the IB Transaction Lines Import program.

In case of any errors, the current rows will be updated to an error status. The worker can resume processing other order lines. Error rows can be resubmitted through the Installed Base - Transaction Errors Processing form.

Configuration Creation at Sales Order Fulfillment

Oracle Installed Base supports creation of the following configurations based on integration with Oracle Order Management:

- PTO models, included items, PTO option class and components
- Kits and components items
- BOM-based configurations

Key Rule: Configurations are only built for a parent item instance with Quantity = 1.

Oracle Installed Base supports the creation of BOM-based configurations at fulfillment. Component-of relationships are created between trackable parent and component instances.

In all cases, at the sales order line for a sales order, transaction detail can be invoked to specify additional details for this instance and other related instances for this update to Oracle Installed Base. Refer to Use of Transaction Details, page 1-15 for information on the use of transaction details.

To use the transaction detail, the transaction subtypes being used must have been previously set up. Refer to Setting Up Transaction Subtypes, page 2-35 for instructions to set up transaction subtypes.

Ordering Process for End Customers and Partners

Oracle Installed Base is integrated with the Oracle Order Management end-customer or partner ordering process, and information that is specific to end customers can be automatically captured in Oracle Installed Base from sales orders.

You set up order management default values to specify Oracle Installed Base ownership and the current and installed location in sales orders.

Oracle Installed Base populates the owner, owner account, current location, and the installed location in the transaction detail, based on the order management defaults or entries in the sales order line.

Following sales order fulfillment, these values are appropriately reflected in Oracle Installed Base for an item instance.

The owner/account can come from the sold-to party/account or the end-user/account, the current location can come from the shipped-to location, end-user location, sold-to location, or deliver-to location, the installed location can come from shipped-to location, end-user location, sold-to location, or deliver-to location.

WIP Integration

Oracle Installed Base supports and reflects the majority of inventory transactions sourced from WIP jobs and WIP transactions including component-of configuration creation at WIP assembly completion.

WIP assembly completion creates a receipt and a subsequent transaction in Oracle Inventory. The Oracle Installed Base integration point with WIP is strictly through the inventory material transaction, not through any internal WIP transactions.

See Inventory Transactions, page 1-7 for more information.

Assembly Completion and Allocation

The creation of Oracle Installed Base configurations in the context of WIP integration is determined by several variables including auto allocate parameter, genealogy enabled, single versus multiple job assembly quantity, serial control, trackable components, and others.

In general configurations are created subject to Rule 1 below.

Rule 1

For auto allocate = 'Y' and genealogy not enabled, configurations are built based on job requirements. Generally, excess component quantity is not attached to a configuration. Excess quantity is only attached if there is no job requirement.

Other considerations include the following:

- Configurations are only built for serialized assemblies (serialized at receipt or predefined).
- Components are added or removed from existing configurations following post-completion transactions. (For example, WIP component issue/return and WIP negative component issue/return)
- Oracle Installed Base provides configuration support for work order-less WIP completions.
- Configurations (component removal and installation) are not supported at assembly completion for CMRO WIP jobs.

For assembly quantity = 1, configurations are created and modified based on issued component quantities. An exception is the following repair/upgrade scenario: If item/serial number A is issued to a job and job completion creates the same item/serial number or the same item with a new serial number B, then the original serial number A is not created as a component of itself (original serial number A or new serial number B).

For multi-quantity assembly jobs, configuration creation is governed by the Auto Allocate install parameter: Auto Allocate = 'Y' and genealogy not enabled.

For serialized components:

- Completion configuration is based on a random allocation (order of serial numbers) in the ratio of total job component quantity required to job assembly quantity, if job requirements exist. If no job requirements exist, then configuration is based on component quantity issued to job assembly quantity. Excess quantity is randomly issued.

- Post component issues are added based on ratios specified in job material requirements, subject to Rule 1.

For non-serialized components:

- Component issues are added based on quantity required to job quantity if job requirements exist. Otherwise, component issues are based on quantity issued to job quantity if no requirements exist.

- Post component issues are added based on ratios specified in job material requirements. Auto Allocate = 'N' and genealogy enabled.

For serialized components:

- Configuration is created according to genealogy or from the parent serial number in the MTL table.

- No random allocation is performed.

For non-serialized components:

- Configuration relationships are built only for specific quantity allocations.

- Only a single level configuration is built for a given WIP job. To process multiple levels of configuration, multiple jobs must be created and executed for subassemblies.

At the time of sales order shipment, the ownership and location are changed to that of the customer, depending on the transaction being used. Key supported WIP transactions include:

- WIP Component Issue

- Wip Component Return

- Wip Negative (Wip-ve) Component Issue

- Wip-ve Component Return

- Wip Assembly Completion

- Wip Assembly Return

Support for Internal Sales Orders

The internal sales order is one of the means to transfer items between internal organizations. Oracle Installed Base supports the internal order process subject to specific rules and conditions. It updates item instances for internal order transactions including internal order pick, internal order in-transit shipment, internal order direct shipment and internal order in-transit receipts.

The key condition affecting Oracle Installed Base support for internal sales orders requires the selection of the Oracle Inventory Oracle Installed Base tracking parameter at item master level. Items must be selected as Trackable for all organizations. Similarly, lot, locator, revision, and others must be set at the master level. Generally Oracle Installed Base supports organization-level serial control combinations provided by Oracle Inventory. Specific conditions such as serialized at receipt item in Org A to serialized at sales order issue item in Org B are not supported.

In general, Oracle Installed Base updates the following item attributes in the internal sales order process.

Serialized Items

Inventory Location attributes (Organization ID, Sub-inventory, Location, Locator, Lot) are appropriately updated to reflect the transferred organization.

Non-Serialized Items

Instances may be created and/or updated (quantity decreased or increased) appropriately based on whether instances exist, negative quantities are allowed and so on.

In-Transit Internal Order Shipments

- Instance usage and location type are updated to 'In-Transit' at shipment subject to serial/no-control rules.
- Instance usage and location type are updated to 'In-Inventory' on receipt subject to serial/no-control rules.

Direct Internal Order Shipments

Instance usage and location type are updated to 'In-Inventory' subject to serial or no-control rules.

Inter-Organization Transfers

These generally are subject to the same rules and processes listed earlier in this section.

Asset Integration

For information about asset integration, refer to *Oracle Asset Tracking Implementation Guide* and *Oracle Asset Tracking User Guide.*

Project Integration

For information about project integration, refer to *Oracle Asset Tracking Implementation Guide* and *Oracle Asset Tracking User Guide.*

Use of Transactions Details

The Transaction Details window is used to capture additional information that is used to update the instance, an RMA return line, and a sales order line.

The Transaction Details can be activated on the sales order line window by clicking Actions and selecting Installation Details. For a full description of this window, refer to Using the Order Management Transaction Details Window in *Oracle Installed Base User's Guide* and online help.

2

Implementation and Setup for New Users

This chapter covers the following topics:

- Product Dependencies and Requirements
- Setup Checklist for New Users
- Related Setup Steps within Other Oracle Applications
- Related Setup Steps within Oracle Asset Tracking
- Setup Steps within Oracle Installed Base

Product Dependencies and Requirements

The following modules must be installed and set up for Oracle Installed Base. Refer to the appropriate guides to install and set up these modules:

- *Oracle Inventory*
- *Oracle Asset Tracking*
- *Oracle Service Fulfillment Manager*
- *Oracle Order Management*
- *Oracle Purchasing* (optional)
- *Oracle Accounts Receivable*
- *Oracle Work in Process* (optional)
- *Oracle Bills of Material*

Setup Checklist for New Users

The following provides a checklist of setup steps for new users of Oracle Installed Base.

Step Number	Title	Required or Optional	Seeded?	Extensible?
1.	Synchronize On-Hand Balance with Oracle Inventory, page 2-6	Required	NA	NA
2.	Set Up Inventory Serial Control at the Master Level, page 2-6	Required	NA	NA
3.	Set Up Oracle Installed Base Items in the Item Master, page 2-6	Required	NA	NA
4.	Set Up Parties, page 2-7	Required	N	N
5.	Set Up Vendors, page 2-7	Optional	N	N
6.	Set Up Employees, page 2-7	Optional	N	N
7.	Set Up Party Accounts, page 2-7	Required	N	N
8.	Set Up Party Contacts, page 2-7	Required	N	N
9.	Verify the Setup of the Oracle Service Fulfillment Manager Event Queue, page 2-8	Required	N	N
10.	Set Up the Action Menu in Oracle Order Management, page 2-8	Required	N	N
11.	Set Up the Order Management Workflow for Non-Shippable Items, page 2-9	Required	N	N
12.	Run the License Manager Program, page 2-12	Required	N	N
13.	Verify the Setup of Four Profile Options for Oracle Asset Tracking, page 2-13	Required	N	N

Step Number	Title	Required or Optional	Seeded?	Extensible?
14.	Verify Location IDs in HZ_LOCATIONS, page 2-13	Required	Y	N
15.	Verify Codes for Asset Update Statuses, page 2-13	Optional	Y	N
16.	Set Up Installation Parameters, page 2-15	Required	N	N
17.	Set Up Codes for Party-Account and Party-Contact Relationship Types, page 2-18	Required	Y	Y
18.	Verify Codes for Instance Relationship Types, page 2-19	Required	Y	N
19.	Verify Extended Attribute-Level Codes, page 2-20	Required	Y	N
20.	Set Up Extended Attribute Pools, page 2-20	Optional	N	Y
21.	Set Up Extended Attribute Classifications, page 2-21	Optional	N	Y
22.	Set Up Extended Attributes, page 2-21	Optional	N	Y
23.	Verify Accounting Classification Codes, page 2-21	Required	Y	N
24.	Set Up Instance Type Codes, page 2-22	Optional	N	Y
25.	Verify Codes for Instance Location Sources, page 2-22	Required	Y	N
26.	Verify Party Sources, page 2-23	Required	Y	N

Step Number	Title	Required or Optional	Seeded?	Extensible?
27.	Set Up Codes for Instance-Operating Unit Relationship Types, page 2-24	Required	Y	Y
28.	Set Up Version Labels, page 2-25	Optional	Y	Y
29.	Set Up System Type Codes, page 2-25	Required	N	Y
30.	Set Up Split Process Reasons, page 2-25	Optional	N	Y
31.	Verify Oracle Configurator Enabled Values, page 2-26	Required	Y	N
32.	Verify Instance Class Values, page 2-26	Required	Y	N
33.	Verify Values for the Resubmit Interface Process, page 2-27	Required	Y	N
34.	Verify Values for CSI: Propagate Systems Changes, page 2-27	Required	Y	N
35.	Set Up Regions for the Advanced Search Page, page 2-28	Optional	Y	N
36.	Set Up the Results of the Search Item Instances Page, page 2-29	Optional	Y	N
37.	Set Up Instance Statuses, page 2-32	Required	Y	Y
38.	Set Up Source Transaction Types, page 2-34	Required	Y	Y
39.	Set Up Transaction Subtypes, page 2-35	Required	Y	Y

Step Number	Title	Required or Optional	Seeded?	Extensible?
40.	Set Up the Transaction Subtypes LOV from Non-Service Processes, page 2-38	Required	Y	N
41.	Verify Transaction Status Codes, page 2-39	Required	Y	N
42.	Verify Transaction Error Source Types, page 2-39	Required	Y	N
43.	Create Business Users, page 2-40	Required	N	N
44.	Create Agent Users, page 2-40	Required	N	N
45.	Schedule the Expire End Dated Instances Program, page 2-41	Required	N	N
46.	Schedule the Installed Base Open Interface Program, page 2-41	Required	N	N
47.	Schedule the Initiate Mass Edit Program, page 2-42	Required	N	N
48.	Schedule the Process Mass Edit Program, *Oracle Installed Base Implementation Guide*	Required	N	N
49.	Schedule the Process Old Order Lines-Fulfillable Only Program, page 2-43	Required	N	N
50.	Schedule the Resubmit Interface Process, page 2-44	Required	N	N
51.	Schedule the Resubmit Waiting Transactions Program, page 2-44	Required	N	N
52.	Schedule the Installed Base and Inventory Data Discrepancies Program, page 2-45	Required	N	N

Step Number	Title	Required or Optional	Seeded?	Extensible?
53.	Final Synchronize On-Hand Balance with Oracle Inventory, page 2-46	Required	NA	NA

Related Setup Steps within Other Oracle Applications

Synchronize On-Hand Balance with Oracle Inventory

Oracle Installed Base maintains a mirror image of what is in Oracle Inventory to maintain lifecycle tracking for all items that are to be tracked in Oracle Installed Base. For new implementations of Oracle Installed Base, all on-hand quantities of Oracle Installed Base trackable items must be issued out of Oracle Inventory. Oracle recommends that you use the miscellaneous issue transaction in Inventory to perform this step.

You receive these items back into Inventory at Step 53 in the checklist. Refer to Setup Checklist for New Users, page 2-46.

Set Up Inventory Serial Control at the Master Level

Oracle Installed Base requires that the serial control of Oracle Installed Base trackable items is set up in the master organization for Oracle Installed Base to support the continuous tracking through all organizations. For instructions on how to do this, consult the *Oracle Inventory User's Guide*.

Set Up Oracle Installed Base Items in the Item Master

All items that need to be tracked in Oracle Installed Base and Asset Tracking are set up as Oracle Installed Base trackable, whether they are tangible, inventory-transactable, shippable items such as a computer or intangible, noninventory-transactable, non-shippable items such as a license. An item can be either Oracle Installed Base trackable or a service item such as a contract. It cannot be both.

For an item to be set up as trackable in Oracle Installed Base, the Installed Base Tracking check box must be selected on the Service tabbed page of the Master Item page (Inventory > Items > Master Items). This item attribute must be controlled at the master inventory organization level only.

To create a warranty for a item instance, the service item of the contract must be part of the BOM of the top assembly item.

Instances can be created online and through interfaces such as Inventory receipt and

WIP assembly completion.

Refer to Integration with the Oracle E-Business Suite, page 1-6 for information about instance creation through integration.

For more information about how to set up items in Item Master, see the *Oracle Inventory User's Guide*.

Set Up Parties

The parties associated with item instances in Oracle Installed Base must be defined in HZ_PARTIES first.

For more information about how to set up parties, see the *Oracle Accounts Receivable Implementation Guide*.

Set Up Vendors

The vendor parties associated with item instances in Oracle Installed Base must be defined in PO_VENDORS first. For more information about how to set up vendors, see the Oracle Purchasing implementation guides.

Set Up Employees

Employees can be associated with Oracle Installed Base item instances as parties. To do so, employees must be defined in the HR tables first.

For more information about how to set up employees, consult *Oracle Human Capital Management Implementation Guides.*

Set Up Party Accounts

The parties associated with item instances in Oracle Installed Base can have a number of accounts associated with them. These accounts need to be defined in the HZ_CUST_ACCOUNTS table before referencing them in Oracle Installed Base.

For more information about how to set up party accounts, consult the *Oracle Accounts Receivable Implementation Guide*.

Set Up Party Contacts

Oracle Installed Base can maintain the contacts to parties associated with item instances. These contacts to parties must be defined in the HZ_PARTIES table using the Contact Center window before referencing them in Oracle Installed Base.

For more information about how to set up party contacts, consult the *Oracle Accounts Receivable Implementation Guide*.

Verify the Setup of the Oracle Service Fulfillment Event Manager Queue

For instructions on setting up the Oracle Service Fulfillment Event Manager Event Queue, refer to the *Oracle Service Fulfillment Manager Implementation Guide.*

Oracle Installed Base is dependent on the SFM Event Manager Queue Service, specifically the Event Manager Queue, which must always be active.

Setup to Ensure the Serializability of Transactions Processed in Oracle Installed Base (One Time)

At any one time several transactions originating from Inventory and Order Management can be processed in Oracle Installed Base. To eliminate the errors that can occur due to the concurrent execution of these transactions, the following steps must be performed to ensure the serializability of these transactions:

Steps

1. Log into Oracle Applications.
2. Navigate to System Administrator > Concurrent > Manager > Define.
3. Query for the Manager SFM Event Manager Queue Service.
4. Click Work Shifts.
5. Change the processes to 1.
6. In the Parameter field, change the value of XDP_DQ_INIT_NUM_THREADS to 1.
7. Stop and restart the SFM Event Manager Queue.

Monitor SFM's Event Manager Queue Service (Daily Basis)

If a DBA wants to check whether SFM's Event Manager Queue Service is running, this can be done from any of the following places:

- SFM's Queue Console - this provides the status as well as the queue size.
- Concurrent Manager's Administer Manager Form - this provides the status.
- Oracle Application Manager's SFM page - this page is in HTML. It allows a DBA to see the Event Manager Queue Service status and Queue Size.

Set Up the Action Menu in Oracle Order Management

This menu setup is required so that Transaction Details and Maintain Systems windows are set up as part of the Action menu.

Steps

1. Log on to Oracle Applications with the System Administrator responsibility.
2. Choose Applications > Menu.
3. Choose View > Query By Example > Enter.
4. In the Menu field, enter the string ONT_SALES_ORDERS.
5. Choose View > Query By Example > Run.
6. Go to the last record in the multi-record details block.
7. Choose File > New to create new records with the following Field Values:
    1. Seq: Choose the next sequence.
    2. Function: Select Install Base Transaction Details from the list of values.
    3. Seq: Choose the next sequence.
    4. Function: Select IB Maintain Systems from the list of values.
8. Save the record.

Set Up the Order Management Workflow for Non-Shippable Items

Oracle Installed Base creates instances when tangible items are received into inventory. It tracks tangible items, for example, as they move between locations in inventory, when they are shipped to customers, and when they are returned to an enterprise. Inventory is a key driver enabling Oracle Installed Base tracking of tangible items.

Tracking intangible items, which are non-shippable and non-stockable, requires a separate procedure because Oracle Installed Base has no direct interaction with inventory.

Generally, intangible or fulfillable items are created and tracked commencing with sales order fulfillment. This requires integration with Oracle Order Management. The integration provides Oracle Installed Base with information regarding fulfilled sales order lines. The integration is achieved by modifying Oracle Order Management order line workflows. The information below provides detailed steps to accomplish the modification.

The following two main steps are required to modify order line workflows to enable Oracle Installed Base tracking for non-shippable items:

1. Set up Oracle Workflow Builder.

2. Set up Oracle Order Management transaction types.

Set Up Oracle Workflow Builder

The Workflow Builder setup is done in Oracle Workflow Builder. Use this procedure.

Steps

1. Log on to Oracle Workflow Builder on your client PC.
2. Double-click the Workflow Builder icon.
3. Select File > Open > Database.
4. Enter username apps, your apps password, and the connect string for your database instance.
5. Click OK.
6. Select OM Order Line from the Show Item Types window.
7. Click the << button to move to the Visible list, and click OK. The Navigator window opens.
8. Expand the list in the Navigator window by clicking the + sign.
9. Click OEOL / OM Order Line to select it.

   Now you are ready to add a new function.
10. Choose Edit > New > Function from the menu. The Function Properties window appears.
11. Enter the following details in the Activity tabbed page:
    - Internal Name: INSTALL_BASE_INTERFACE
    - Display Name: Install Base Interface
    - Description: Oracle Install Base interface for fulfillable order lines
    - Function Name: CSI_ORDER_FULFILL_PUB.FULFILL_WF
    - Function Type: PL/SQL
    - Result Type: <None>
12. In the Details tabbed page, ensure that values are set as follows:
    - Error Item Type: WFERROR

- Error Process: RETRY_ONLY
- On Revisit: Reset

13. Click OK.

    Now you are ready to create a new process and assign the new function to the process.

14. Select Processes.

15. Right-click the order line flow that you want to customize and choose Copy.

16. Right-click again and choose Paste. This opens the Processes Properties window.

17. Enter a different Internal Name and Display Name for the newly created process, and click OK.

18. Double-click the newly created process to open it.

19. Click the New Function icon on the top icon bar.

20. Click the Internal Name LOV, and choose INSTALL BASE INTERFACE.

21. Delete the line after the Fulfill function. This line is the one going from Fulfill to the node after Fulfill.

22. Insert Install Base Interface after the Fulfill function.

23. Right-click Fulfill, and drag it to Install Base Interface.

24. Right-click Install Base Interface, and drag it to the node after Fulfill. For option results, choose Any.

25. Save your work and exit.

Note: This customization must be done for fulfill-only order line workflows. They are those without shipping activity as, for example, a Bill Only or Line Flow - ATO Model.

Note: The same process must be followed for return lines, which are those without a receipt activity in the order line workflow. The process is required for a non-shippable RMA interface to Oracle Installed Base as, for example, the seeded process Line Flow - Return for Credit Only.

Set Up Oracle Order Management Transaction Types

Use this procedure to set up the required transactions types in Oracle Order Management.

Steps

1. Using the Order Management Super User responsibility, navigate to Setups > Transaction Types.
2. Query the desired transaction types that you plan to use on the sales orders.
3. Click Assign Work Flows.
4. End date appropriate seeded line types using seeded workflows.
5. Create another record with the same line type (expired record).
6. Assign Modified Workflow process, for example, CSI Line Flow-Generic, created in Oracle Workflow Builder, to this line type.
7. Save your work and exit.

Process Sales Orders for Non-Shippable Items

After the two main setup steps are complete, sales order lines using newly customized workflows have an interface to Oracle Installed Base. Use this procedure to process sales orders for non-shippable items.

Steps

1. Place an order for a non-shippable item through Oracle Order Management using the customized line type created in the previous section.
2. Book the sales order.
3. Schedule or run the Oracle Order Management Workflow background process.
4. View the instance created in Oracle Installed Base.

Related Setup Steps within Oracle Asset Tracking

Run the License Manager Program

Run this program to license Oracle Asset Tracking only if you have not installed Oracle Asset Tracking. It enables Oracle Asset Tracking functionality for inventory receipts and other processing required for Oracle Installed Base.

Verify the Setup of Profile Options for Oracle Asset Tracking

This is required only if you have not installed Oracle Asset Tracking. Confirm that the following profile options were set up:

- MO: Operating Unit (default operating unit)
- CSE: Debug Option (Y or N)
- CSE Debug Log Directory (path name)

Verify Location IDs in HZ_LOCATIONS

The following table lists the locations that must be defined in the HZ_LOCATIONS table before using them in Oracle Installed Base:

Locations That Must Be Defined in the HZ_LOCATIONS Table

Location	Description
Project	A fixed location ID defined for Projects in the HZ_LOCATIONS table.
WIP	A fixed location ID defined for WIP in the HZ_LOCATIONS table.
IN_TRANSIT	A fixed location ID defined for In-transit in the HZ_LOCATIONS table.
PO	A fixed location ID defined for PO in the HZ_LOCATIONS table.

These fixed location IDs must be defined in HZ_LOCATIONS first before setting up the Installation Parameters in a later step. To set up locations, do the following:

1. Using the Oracle Installed Base Admin responsibility, navigate to Setups > Maintain Locations. The HZ Locations window appears.
2. Set up locations in this window.

Verify Codes for Asset Update Statuses

Type: CSI Lookup

Lookup Type: CSI_ASSET_UPDATE_STATUS

Access Level: System (non-extensible)

Verify that the following values that are shown in the following table are already seeded for CSI_ASSET_UPDATE_STATUS.

Seeded Values for CSI_ASSET_UPDATE_STATUS

Lookup Code	Meaning	Description
IN-SERVICE	In-Service	In-Service
RETIRED	Retired	Retired

Refer to the *Oracle Asset Tracking Implementation Guide* for details.

Setup Steps within Oracle Installed Base

Most of these steps are performed through navigation to Oracle Installed Base Setups and Lookups. You access these through the Oracle Installed Base Administrator responsibility. Online help for the Installed Base Lookups window provides information about lookups. The menu options for the Oracle Installed Base Administrator include the following entries:

- Transaction Errors Processing
- Open Interface Error Details
- Lookups
- Setups
  - Install Parameters
  - Instance Relation Types
  - Party Account Relation Types
  - Transaction Subtypes
  - Source Transaction Types
  - Extended Attribute Template
  - Instance Statuses
  - Asset Location Setup

- Maintain Locations
- Counter Property Type

- Others
  - Requests
  - Reports

Set Up Installation Parameters

Oracle Installed Base includes a set of customer-specific installation parameters defined in a table at setup time. Use the Install Parameters page (Oracle Installed Base Administrator > Setups > Install Parameters) to define them. After you define the parameters and select the Freeze check box, the fields cannot be updated.

The migration procedure populates the table with default data. After migration, you open the window for update before the freeze takes effect.

The following list defines the fields in the Install Parameters page.

- Party Name: The name of your own enterprise that you define in TCA as an internal organization. It is the owner of the item instance when it is owned by your own enterprise. Item transfers from this party are not supported. The organization cannot be changed after it is set.

  For new Oracle Installed Base customers, this party can be first set up as an internal party by a responsibility that holds the Contact Center or Customer Create functionality. Such responsibilities may include:

  - Order Management Superuser
  - Depot Repair Manager
  - Field Service Manager

  This party does not require an account number. This HZ_PARTY can then be used in the Party Name field in the Installed Base Parameter setup.

  In the case of upgrades, this setup is done by setting the profile option Service: Migration Organization for Employee Service Requests. This profile option setting is only used during the upgrade process to populate the Party Name field in the Install Parameters window. After the upgrade is complete, all functionality refers to the value in the Party Name field of the Install Parameters window and not to the profile option. For example: You buy and receive an item in Oracle Receiving. The Oracle Installed Base process that creates the item instance assigns ownership of this new instance based on the Party Name in the Install Parameters window.

If you are not using the full Oracle Receivables and are using shared functionality, you must access the Customer setup through different responsibilities that have Customer Create and Update functionality. Such responsibilities may include:

- Field Service Superuser
- Depot Repair Manager
- Manufacturing and Distribution Manager

Note: Do not use this party as the object of a merge in TCA merge routines.

- Full Dump Frequency: The number of updates of an Oracle Installed Base record before a full image of the record is dumped into the history table. For example, HISTORY_FULL_DUMP_FREQUENCY=10 means that every 10th update made to a record in any Oracle Installed Base table is followed by a complete dump of record's image (changed as well as unchanged columns) in the corresponding history table. For the remaining nine updates, only the changed values are dumped into the history table.
- Category Set Name: The name of the category set to be used in the additional attributes setup.
- Create Unique Asset For: For all transactions that create an asset, this determines if there is a separate asset for each serialized instance or one asset for all serialized instances.
- All Parties: If selected, then all parties and locations are made available for transfer and location change. If it is not selected, then only related parties and locations are made available for transfer and location changes.
- Freeze: After this is selected, the parameters cannot be changed.
- Allocate at WIP: If selected, conditionally allocates component quantities when completing a multi-quantity assembly WIP job.

  Some of the general conditions governing multi-quantity WIP assembly completion configurations include:

  - Configurations are built based on job requirements.
  - Configurations are only built for assemblies serialized at receipt or predefined.
  - If genealogy is enabled, configurations are created according to genealogy or from the parent serial number.

- Override Ownership: If selected, allows Oracle Installed Base processing of RMA receipts, order shipment, and miscellaneous receipts regardless of ownership.

  For example:

  In the case of an RMA receipt, Oracle Installed Base processes the request even if the RMA customer is different from existing instance ownership. Oracle Installed Base changes ownership to the RMA customer if the transaction subtype's Change Owner To field is null.

  For a miscellaneous receipt (serialized at-receipt or predefined) of an existing Oracle Installed Base instance, the ownership changes to Internal.

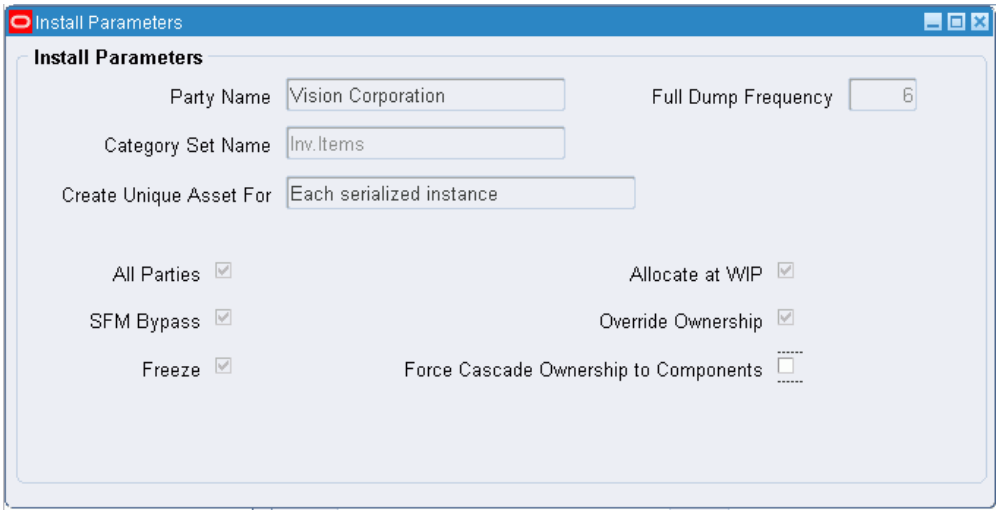
  > **Note:** By default, the Override Ownership checkbox is not selected. After you select it and save one or more transactions, *never* attempt to change it because doing so results in irrecoverable data corruption.

- SFM Bypass: Replaces the previous CSE: Bypass Event Queue profile option.

  > **Note:** Do not select this checkbox. The selected state is reserved for internal testing purposes and is not recommended. For further information, refer to the *Oracle Asset Tracking Implementation Guide*.

- Force Cascade Ownership to Components: Whenever ownership of an item instance changes for a parent instance, selecting this option causes the application to cascade ownership of the parent to component children in a configuration for outbound transactions such as Shipment.

  This value becomes the default for the Cascade Ownership field in the Source Transaction Details tab of the Order Management Transaction Details window. You can override the value in that window.



Set Up Codes for Party-Account and Party-Contact Relationship Types

The instance party account relationship codes define the types of relationships that can be set up for parties, accounts, and contacts. The six seeded relationship types are defined in the following table:

Seeded Relationship Types

Name	Party Selected?	Account Selected?	Contact Selected?
OWNER	Y	Y	N
BILL-TO	Y	Y	Y
SHIP-TO	Y	Y	Y
SOLD-TO	Y	Y	N
TECHNICAL	N	N	Y
SERVICE-ADMINISTRATION	N	N	Y

You can set up additional relationship type codes for party, account, and contact and define them by selecting the appropriate Party, Account, and Contact check boxes in the Instance Party Account Relationship Types page.

For more information about setting up these codes, see the *Oracle TeleService*

Implementation and User Guide.

Verify Codes for Instance Relationship Types

Oracle Installed Base supports the eight types of instance-to-instance relationships shown in the following table:

Relationship Type Codes

RELATIONSHIP TYPE CODE	NAME	RELATIONSHIP DIRECTION
COMPONENT-OF	Component Of	Subject-to-Object
MEMBER-OF	Member Of	Subject-to-Object
PROVIDED-BY	Provided By	Subject-to-Object
INSTALLED-ON	Installed On	Subject-to-Object
CONNECTED-TO	Connected To	Bi-directional
UPGRADED-FROM	Upgraded From	Subject-to-Object
REPLACEMENT-FOR [for transaction only]	Replacement For	Subject-to-Object
REPLACED-BY [for transaction only]	Replaced By	Subject-to-Object

Component-of is the only relationship type that supports the flow-down of the current location and the installation location from parent to child.

From the Oracle Order Management-Oracle Installed Base shipment/fulfillment integration, component-of configuration can be created through the BOM explosion, PTO model, and ATO model. For details, see the topic Oracle Order Management Integration in the *Oracle Installed Base Implementation Guide*.

From the WIP-Oracle Installed Base integration, component-of configuration can be created through the WIP assembly completion into inventory. For details, see the topic WIP Integration in the *Oracle Installed Base Implementation Guide*.

Replaced-by and replacement-for relationship types are created only by the Oracle Order Management-Oracle Installed Base integration using the Transaction Details window. They are set up as `transaction only`. For further information, refer to "Using the Order Management Transaction Details Window" in *Oracle Installed Base User*

Guide.

All other relationship types can be used in setting up multiple relationship types for the same instance. No location flow-down rules apply.

Verify that the standard instance statuses are seeded by checking the content of the Instance-Instance Relation Type Codes window.

Verify Extended Attribute-Level Codes

Type: CSI Lookup

Lookup Type: CSI_IEA_LEVEL_CODE

Access Level: System (non-extensible)

Use the following table to verify that the indicated values are already seeded for CSI_IEA_LEVEL_CODE. The table describes the four levels of extended attributes that you can define for Oracle Installed Base items. These are the extended attributes that are used in the Extended Attribute page of the application.

Lookup Code	Meaning	Description
GLOBAL	Global	Applicable to all item instances in Oracle Installed Base
CATEGORY	Category	Applicable to the items of the category for which the extended attributes are defined
ITEM	Item	Applicable to all instances of the item type for which the extended attribute is defined.
INSTANCE	Instance	Applicable only to the instance for which the extended attribute is defined.

Use the Installed Base Lookups window to verify that these codes are seeded for type CSI_IEA_LEVEL_CODE.

Set Up Extended Attribute Pools

Type: CSI Lookup

Lookup Type: CSI_EXTEND_ATTRIB_POOL

Access Level: Extensible

Values are not seeded for this code.

Optionally define extended attribute pools with code values such as color and grade.

To set up extended attributes, the name and code of the attribute have to be set up in the pool of attributes. This is where users can define an attribute's name, code, and description to be used in the LOV when the extended attribute is set up.

Set Up Extended Attribute Classifications

Type: CSI Lookup

Lookup Type: CSI_IEA_CATEGORY

Access Level: Extensible

Values are not seeded for this code.

Optionally define extended attribute classifications such as chemical and physical.

To set up extended attribute classifications, the name and code of the attribute have to be set up in the pool of attributes (see Set Up Extended Attribute Pools, page 2-20). Then each attribute can be classified into category. This is the table to define the categories by which an attribute can be classified from a LOV in the extended attribute setup.

Set Up Extended Attributes

The extended attributes used for Oracle Installed Base item instances must be defined in the Extended Attributes window.

Four levels of extended attributes can be defined for Oracle Installed Base items:

- Global: Global Level Extended Attributes are applicable to all the item instances in Oracle Installed Base.
- Item Category: Category level extended attributes are applicable to the items of the category for which the extended attributes are defined.
- Inventory Item: Item level extended attributes are applicable to all the instances of the item type for which the extended attribute is defined.
- Instance: Instance level extended attributes are applicable only to the instance for which the extended attribute is defined.

Use the Oracle Installed Base Extended Attributes window to define these attributes.

Verify Accounting Classification Codes

Type: CSI Lookup

Lookup Type: CSI_ACCOUNTING_CLASS_CODE

Access Level: System (non-extensible)

Verify that the following values shown in the following table are already seeded for CSI_ACCOUNTING_CLASS_CODE.

Accounting Classification Codes

Lookup Code	Meaning	Description
INV	Inventory	Inventory
ASSET	Asset	Asset
WIP	Work In Process	Work In Process
PROJECT	Project	Project
CUST_PROD	Customer Product	Customer Product

Set Up Instance Type Codes

Type: CSI Lookup

Lookup Type: CSI_INST_TYPE_CODE

Access Level: Extensible

No values are seeded for CSI_INST_TYPE_CODE.

Define the instance type codes used by your organization. You can enter any value. Examples of instance types are Hardware, Software, and Service. This code is an optional classification for an instance and is used in the general attributes page in the application.

Verify Codes for Instance Location Sources

Type: CSI Lookup

Lookup Type: CSI_INST_LOCATION_SOURCE_CODE

Access Level: System (non-extensible)

Verify that the values in the following table are already seeded for CSI_INST_LOCATION_SOURCE_CODE.

Instance Location Source Codes

Lookup Code	Meaning	Description
HZ_LOCATIONS	HZ Location	The Location is defined in the HZ_LOCATIONS table.
HZ_PARTY_SITES	HZ Party Site	Item is at an external party site. The location is defined in the HZ_PARTY_SITES table.
INTERNAL_SITE	Internal Site	Item is at an internal site. The location is defined in HR_LOCATIONS table.
INVENTORY	Inventory	Item is in inventory.
IN_TRANSIT	In-Transit	Item is in Transit. Location is defined by in-transit order line ID.
PO	PO	Location is defined in PO_LINES_ALL table.
WIP	Work in Process	Item is in WIP.
PROJECT	Project	Item is in Project.
VENDOR_SITE	Vendor Site	Item is at a vendor site. Location is defined in PO_VENDOR_SITES_ALL table.

These are the types of product locations that are supported in Oracle Installed Base.

Verify Party Sources

Type: CSI Lookup

Lookup Type: CSI_PARTY_SOURCE_TABLE

Access Level: System (non-extensible)

Verify that the values in the following table are already seeded for CSI_PARTY_SOURCE_TABLE.

Party Sources Codes

Lookup Code	Meaning	Description
HZ_PARTIES	HZ_PARTIES	Party is defined in HZ_PARTIES table.
PO_VENDORS	PO_VENDORS	Party is defined in PO_VENDORS table.
EMPLOYEE	HR Employee	Party is defined in PER_ALL_PEOPLE_F table.

This table is not extensible. It defines the types of parties that are supported in Oracle Installed Base for an instance. For example, an owner can be a party (such as a customer), an employee, or a vendor. A party that provides support can be a team or a group.

Set Up Codes for Instance-Operating Unit Relationship Types

Type: CSI Lookup

Lookup Type: CSI_IO_RELATIONSHIP_TYPE_CODE

Access Level: Extensible

Verify that the values in the following table are already seeded for CSI_IO_RELATIONSHIP_TYPE_CODE.

Codes for Instance-Operating Unit Relationship Types

Lookup Code	Meaning	Description
SOLD_FROM	Sold from	The item is sold from this operating unit.
SERVICE_BILL_FROM	Service billed from	The operating unit that gets the credit from Billing.

Define new instance-to-operating units codes specific to your organization. Oracle Installed Base has limited functionality behind this instance-operating unit association. It is for information only. The SOLD-FROM relationship is created each time an instance is sold from an operating unit.

Set Up Version Labels

Type: CSI Lookup

Lookup Type: CSI_INSTANCE_VERSION_LABELS

Access Level: Extensible

Verify that the values in the following table are already seeded for CSI_INSTANCE_VERSION_LABELS.

Setup of Version Labels

Lookup Code	Meaning	Description
AS-CREATED	As-Created	As-Created
AS-MAINTAINED	As-Maintained	As-Maintained
AS-ORDERED	As-Ordered	As-Ordered

Define new version label codes to be used in your organization. This table of codes is used as a source of the LOV for the profile option setup in Default Version Label. It is used as a default when an instance is created.

Set Up System Type Codes

Type: CSI Lookup

Lookup Type: CSI_SYSTEM_TYPE

Access Level: Extensible

When a system is created, a type can be selected from an LOV.

Use the setup window to define system types for your organization. They are used in the Systems page of the application to define systems.

For more information on systems, refer to the *Oracle Installed Base User Guide.*

Set Up Split Process Reasons

Type: CSI Lookup

Lookup Type: CSI_SPLIT_REASON_CODE

Access Level: User (Extensible)

No values are seeded for CSI_SPLIT_REASON_CODE

Define split reasons to be used in your organization.

When an instance with a quantity greater than 1 is split, a reason code can be selected for the reason for the split. This is the window where the reason codes can be set up for use in an LOV.

Verify Oracle Configurator Enabled Values

Type: CSI Lookup

Lookup Type: CSI_CONFIG_ENABLED_VALUES

Access Level: System (Non-Extensible)

This setup maintains the LOV for the profile option CSI: Configurator Enabled and is used for integration with the Oracle Telecommunications Service Ordering solution and the Oracle Configurator product. Values are system defined and seeded.

Verify that the values in the following table are already seeded for CSI_CONFIG_ENABLED_VALUES.

Codes for Oracle Configurator Enabled Values

Lookup Code	Meaning	Description
NETWORK	Network Models Only	Network Models Only
NEVER	Never	Never

Verify Instance Class Values

Type: CSI Lookup

Lookup Type: CSI_ITEM_CLASS

Access Level: System (Non-Extensible)

This setup maintains the LOV for the Instance Class field in the Service tab in the Inventory Item setup. It is used for integration with the Oracle Telecommunications Service Ordering solution and Oracle Configurator.

Confirm that the values in the following table are seeded for CSI_ITEM_CLASS.

Codes for Instance Classes

Lookup Code	Meaning	Description
LINK	Link	Items of this class are used to connect two other item instances in Oracle Installed Base.

Verify Values for the Resubmit Interface Process

Type: CSI Lookup

Lookup Type: CSI_RESUBMIT_OPTIONS

Access Level: System (Non-Extensible)

This setup maintains the LOV for the Oracle Installed Base concurrent request Resubmit Interface process.

Confirm that the values in the following table are seeded for CSI_RESUBMIT_OPTIONS.

Codes for Resubmit Interface Options

Lookup Code	Meaning	Description
ALL	All	All transactions
SELECTED	Selected	Selected transactions from the Error Re-Processing window.

Verify Values for CSI: Propagate Systems Changes

Type: CSI Lookup

Lookup Type: CSI_SYSTEM_WINDOW_DISPLAY

Access Level: System (non-extensible)

This setup maintains the LOV for the profile option CSI: Propagate Systems Changes - Window Display. The Maintain System window uses these values when displaying a confirmation window.

Confirm that the values in the following table are seeded for CSI_SYSTEM_WINDOW_DISPLAY.

Codes for CSI: Propagate Systems Changes

Lookup Code	Meaning	Description
DISPLAY	Always display	Always display
NO_DISPLAY-ALWAYS_CHANGE	Do not display and always change	Do not display and always change
NO_DISPLAY_NEVER_CHANGE	Do not display and do not change.	Do not display and do not change.

Set Up Regions for the Advanced Search Page

Type: CSI Lookup

Lookup Type: CSI_ADV_SEARCH_DEF_SHOW

Access Level: System (Non-Extensible)

Navigation: Unlike the case for most other CSI lookups, you must use the Application Developer responsibility to navigate to Application Lookups > Application Object Library. The Application Object Library Lookups window appears.

This setup lists regions that are shown by default in the Advanced Search page. At the site level, customize the display of that page by removing or collapsing regions as required.

Steps

1. Use the following table to confirm the seeded values for CSI_ADV_SEARCH_DEF_SHOW.

Codes for the Advanced Search Page

Lookup Code	Meaning	Description
00100	CSI_GEN_ATTR	CSI_SHOW
00200	CSI_PARTY	CSI_SHOW
00300	CSI_PARTY_ACCOUNTS	CSI_HIDE

Lookup Code	Meaning	Description
00400	CSI_CURRENT_LOCATIO N	CSI_SHOW
00500	CSI_INSTALLED_AT	CSI_HIDE
00600	CSI_PARTY_CONTACT	CSI_HIDE
00700	CSI_ORDERS	CSI_HIDE
00800	CSI_ASSETS	CSI_HIDE
00900	CSI_CONTRACT	CSI_HIDE
01000	CSI_OTHER_INFO	CSI_HIDE

2. Use the To column in the Effective Dates region to exclude a section from being displayed in the Advanced Search page.

3. Indicate whether a remaining section appears in expanded mode by default by entering `CSI_SHOW` (all uppercase) in its Description column. Otherwise the section is collapsed on the Advanced Search page.

Set Up the Results of the Search Item Instances Page

Type: CSI Lookup

Lookup Type: CSI_PRODUCTS_TABLE_DEF_COLS

Access Level: System (Non-Extensible)

Navigation: Unlike the case for most other CSI lookups, here you must use the Application Developer responsibility to navigate to Application Lookups > Application Object Library. The Application Object Library Lookups window appears.

This setup customizes the display of the search results of the Search Products page by indicating the display and order of viewable columns. (The result is stored internally in the Product Search Results table.) The setup window shows the enabled columns of the corresponding search results with their left-to-right order indicated by their Description value.

Here are some definitions that explain how to use the window:

- The Meaning column lists the prompt IDs of all column titles of the search results.

- Use the To column in the Effective Dates region to exclude a column from being displayed by default in the search results. For example, if by default you do not want to display Usage in the search results, then end date the corresponding row in the lookup to exclude that column.

- The Description column contains a numeric value that indicates the relative order of a column in the search results. A column with a smaller number appears to the left of a column with a bigger number. For example, if you set the Description value for the Status column to 50 compared to 70 for the Quantity column, then Status appears to the left of Quantity in the search results.

- The To date, an end date, is of primary importance. Thus, if a row is end dated, then the Description value is disregarded.

- The lookup does not affect the Item Description column, which always appears as the leftmost column.

The following table lists the codes that are available to set up the results of the Search Products page.

Lookup Code	Meaning	Description
0010	CSI_ITEMNUM	10
0015	CSI_ITEMTYPE	15
0020	CSI_INSTANCE_NUMBER	20
0030	CSI_SERIALNUM	30
0040	CSI_LOTNUM	40
0050	CSI_SYSTEM	50
0060	CSI_SYS_OP_UNIT	60
0070	CSI_TAG_NUMBER	70
0080	CSI_STATUS	80
0090	CSI_QUANTITY	90
0100	CSI_PRODUCT_TYPE	100

Lookup Code	Meaning	Description
0110	CSI_RETURN_BY_DATE	110
0120	CSI_ACTUAL_RETURN_DATE	120
0125	CSI_SHIPPED_DATE	125
0130	CSI_USAGE	130
0140	CSI_SALES_ORDER_NUM	140
0150	CSI_SALES_ORDER_LINE	150
0160	CSI_SALES_ORDER_DATE	160
0170	CSI_PURCHASE_ORDER_NUM	170
0180	CSI_AGREEMENT_NAME	180
0190	CSI_INSTANCE_START_DATE	190
0200	CSI_INSTANCE_END_DATE	200
0210	CSI_OWNER_PARTY_NAME	210
0220	CSI_OWNER_PARTY_NUMBER	220
0230	CSI_OWNER_ACCT_NAME	230
0240	CSI_OWNER_ACCT_NUMBER	240
0250	CSI_INSTALLED_AT_LINE1	250
0260	CSI_INSTALLED_AT_LINE2	260
0270	CSI_INSTALLED_AT_LINE3	270

Lookup Code	Meaning	Description
0280	CSI_INSTALLED_AT_LINE4	280
0290	CSI_INSTALLED_AT_CITY	290
0300	CSI_INSTALLED_AT_STATE	300
0310	CSI_INSTALLED_AT_POSTALCODE	310
0320	CSI_INSTALLED_AT_COUNTRY	320
0330	CSI_VIEW_DETAILS	330
0340	CSI_VIEW_CONFIG	340
0350	CSI_ALL_DETAILS	350
0360	CSI_COPY_PRODUCT	360

Set Up Instance Statuses

Instance statuses are user-extensible and are defined using a combination of options. The following table lists the seeded statuses.

Name	Terminated	Status Change Allowed	Service Allowed	Requests Allowed	Pre-Defined	Updatable
Created	N	Y	Y	Y	Y	N
Expired	Y	Y	N	N	Y	N
Latest	N	Y	Y	Y	Y	N
Loaner	N	Y	N	Y	Y	N
Repaired	N	Y	Y	Y	Y	N

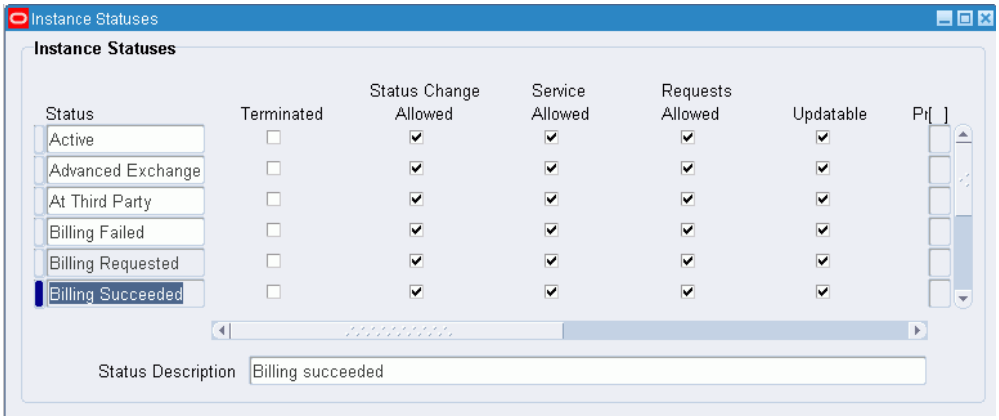
Name	Terminated	Status Change Allowed	Service Allowed	Requests Allowed	Pre-Defined	Updatable
Replaced	N	N	N	N	Y	N
Replaced - No Return	Y	Y	N	N	Y	N
Replacement	N	Y	Y	Y	Y	N
Return for Replacement	Y	Y	N	N	Y	N
Returned for Credit	N	Y	N	N	Y	N
Returned for Repair	N	Y	Y	N	Y	N
Returned for Upgrade	N	Y	Y	N	Y	N
Returned Loaner	N	Y	N	N	Y	N
Spare Part	N	Y	Y	Y	Y	N
Updated	N	Y	Y	Y	Y	N
Upgraded	N	Y	Y	Y	Y	N

The meaning of the check boxes is as follows:

- Terminated: If set to Y, then the instance will be terminated and no further service contracts will be created.
- Status Change Allowed: The status can be changed for an instance currently bearing this status.
- Service Allowed: Service contract can be active for the instance with this status. If set to No, then no further service contracts can be created for an item instance with

this status.

- Requests Allowed: Service request can be created for an instance with this status.
- Pre-Defined: Seeded
- Updatable: The check boxes on this status can be updated.



When you define your own instance statuses, you must set Pre-Defined to N and Updatable to Y.

Set Up Source Transaction Types

Before any source transaction can be used in the LOV for a transaction subtype, it must be defined in this setup in the Source Transaction Types window. All integration sources and transaction types must be defined here before they can be used to update Oracle Installed Base. Values can be seeded or user-defined. See Set Up Transaction Subtypes, page 2-35 for the setup of the transaction subtypes displayed in this window.

Window Fields in the Source Transaction Types Region

Application Name: An LOV of Oracle Applications that can be set up to integrate into Oracle Installed Base.

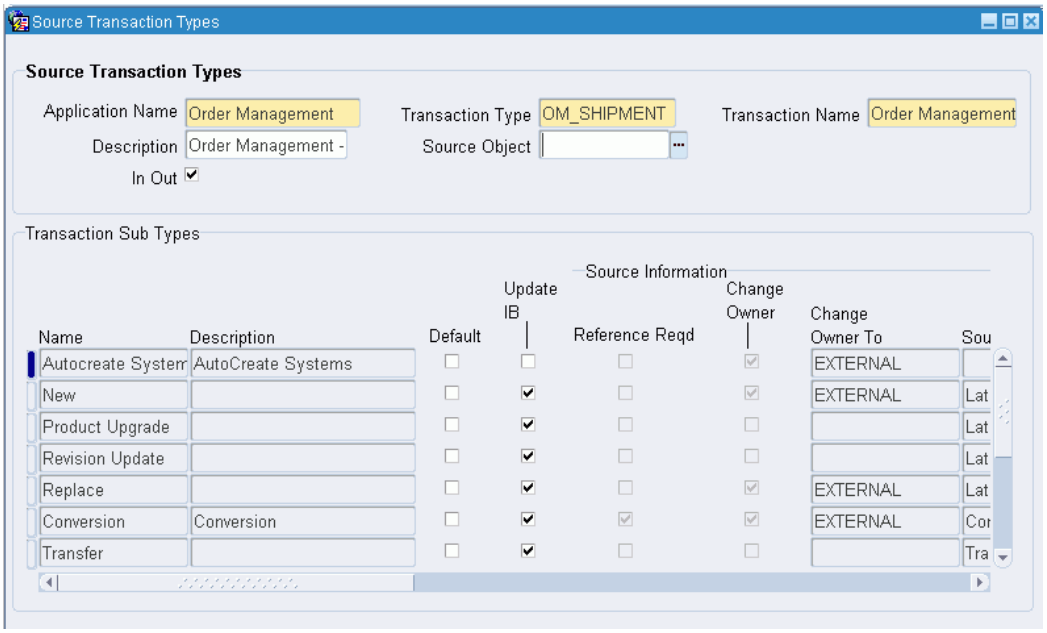
Transaction Type: The user-defined name of the kind of transaction that integrates with Oracle Installed Base from the application named.

Transaction Name: The user-defined name of the transaction.

Description: The user-defined description of the transaction.

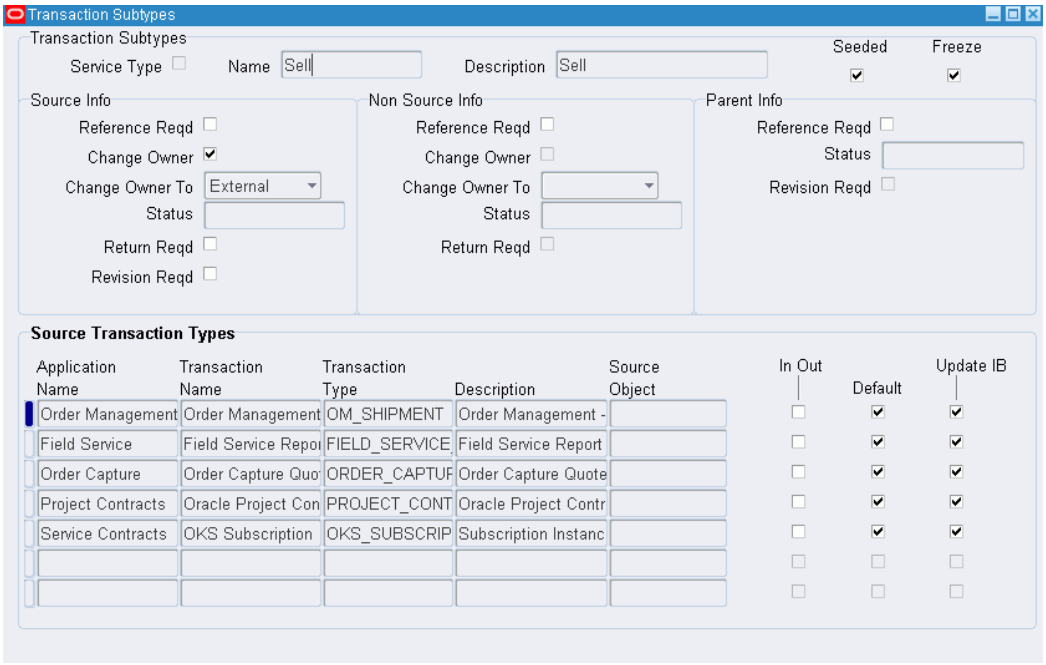
Source Object: Reserved for future use.

In Out: Reserved for future use.



Set Up Transaction Subtypes

Transaction types and subtypes are used to specify the kinds of transactions that the interface program can use. The main purpose of the Source Transactions Subtypes window is to specify what kind of update can be done to an Oracle Installed Base instance when transactions come from other applications. In Oracle Order Management, you can go into the transaction details to pick one of the transactions being defined here. Here you define these transactions and the kind of actions they can perform on the source instance and the non-source instance.



Transaction Subtypes Region

This region is used to define the name of the transaction subtype. The name can come form two sources, depending whether the Service Type check box is selected:

- If the Service Type is selected, then the LOV comes from the Service Transaction Billing Types setup.

- If the Service Type is not selected, then the LOV comes from the Oracle Installed Base Transaction Type code setup. Refer to Set Up the Transaction Subtypes LOV from Non-Service Processes, page 2-38.

The Name field provides the LOV from which you can select the name of the transaction subtype.

Source Info Region

This region is used to define the specific actions to take for the instance being transacted. In the case of the sales order line, it can the part being sold on the sales order line.

Reference Required: Specifies whether an Oracle Installed Base item instance number or reference number is mandated for this transaction type. In the case of a return of a non-serialized item, this Oracle Installed Base item instance number is always required for the Oracle Installed Base interface to know which instance to update. If the part is a serialized item, then this item instance number is not mandated because the interface program can pick up the serial number from the receipt transaction.

Change Owner: Indicates whether a change of ownership is to take place for this

transaction type. If checked, then a change of ownership is to take place.

Change Owner To: Selects the ownership change to be Internal or External. For example, when returning an item for repair, the ownership need not be changed. For a sales order of a shipped item, the ownership can be changed to External.

Status: Defines the status to be updated for this instance. For example, when an instance is returned for repair, its status is changed to Returned for Repair.

Return Reqd: Requires a return date to be entered on the Installation detail for this transaction. Not mandatory.

Revision Reqd: Requires a revision to be entered on the Installation detail for a revision controlled instance. Not mandatory.

Non Source Info Region

This region is to define the specific actions to make for the instance being related to the instance being transacted.

The action to be taken for the non-source instance comes from this region. For example, in order to use this subtype for a to-be-replaced instance in the non-source installation detail, Reference Reqd must be selected, and a status specified.

Reference Reqd: Specifies whether an Oracle Installed Base item instance number or reference number is mandated for this transaction type.

Change Owner: Indicates whether a change of ownership is to occur for this transaction type. If checked, then change of ownership is to occur.

Change Owner To: Selects the ownership change to be Internal or External.

Status: Defines the status to be updated for this instance. For example, the status of a replaced instance can be Replaced.

Return Required: Requires a return date to be input on the transaction detail for this transaction.

Parent Info Region

This region is for future use. Thus, the Reference Reqd, Status, and Revision Reqd fields are not currently used.

Transaction Subtypes Region

The tab ordering of the fields in the window now returns to this region to the Freeze and Seeded check boxes.

Source Transaction Types Region

This region is to define the source application from which the transaction being defined comes.

This is a LOV of transaction types defined first in the Source Transaction Type setup. For example, the Sell transaction subtype comes from the Oracle Order Management

application OM_SHIPMENT. Return for Credit comes from the Oracle Order Management application RMA_RECEIPT type.

Other examples of application sources are Oracle Field Service and Oracle Order Capture.

The In Out field is not being used for this release.

Default: Indicates whether this transaction subtype is to be used as the default subtype for that source transaction type and application being defined. For example, Sell is the default subtype for OM_SHIPMENT/ Order Management Ship/Fulfill sales order lines. Return for Repair is the default subtype for the RMA_RECEIPT/ Order Management Return line.

Update IB: Indicates whether this subtype/source transaction type combination is used to update Oracle Installed Base. For example, some subtypes set up for the Oracle Field Service application updates Oracle Installed Base only from Oracle Field Service.

Set Up the Transaction Subtypes LOV from Non-Service Processes

Type: CSI Lookup

Lookup Type: CSI_IB_TXN_TYPE_CODE

If the Service Type check box of the Source Transactions Subtypes window is not selected, then the LOV comes from the Oracle Installed Base Transaction Type Codes setup.

This setup is found in the Oracle Installed Base Administrator /Lookup/ CSI_IB_TXN_TYPE_CODE table. Six seeded values are used in the transaction subtype setup, and more can be user-defined.

Use the following table to confirm the seeded values for CSI_IB_TXN_TYPE_CODE.

Lookup Code	Meaning	Description
ADD	Add	Add
FULFILL	Fulfill	Fulfill
ISSUE	Issue	Issue
MOVE	Move	Move
RECEIVE	Receive	Receive
SELL	Sell	Sell

Verify Transaction Status Codes

Type: CSI Lookup

Lookup Type: CSI_TRANSACTION_STATUS_CODE

Access Level: System

Values are seeded for this code.

Use the following table to confirm the seeded values for CSI_IB_TXN_TYPE_CODE.

Lookup Code	Meaning	Description
COMPLETE	Complete	No further FA/PA processing
INTERFACED	Interfaced to PA	PA transaction interfaced
PENDING	Pending	Need further FA/PA processing

Verify Transaction Error Source Types

Type: CSI Lookup

Lookup Type: CSI_TXN_ERRORS_SOURCE_TYPES

Access Level: System

Values are seeded for this code.

When an integration transaction is processed with an error, it is posted to the error table with one of the these error source types, which indicate where an error comes from.

Use the following table to confirm the seeded values for CSI_TXN_ERRORS_SOURCE_TYPES.

Lookup Code	Meaning	Description
AP_INVOICE_DISTRIBUTIONS_ALL	AP Invoice Distribution All	For the AP invoice distribution events.
EIB_NOTIFICATIONS	EIB Notifications	Indicates that the message is a notification generated by Oracle Asset Tracking during transaction processing.

Lookup Code	Meaning	Description
FA_RETIREMENTS	FA Retirements	For the asset retirement and asset reinstatement events.
MIL_MATERIAL_TRANSACTIONS	MIL Material Transactions	For all inventory-related events.
RCV_TRANSACTIONS	RCV Transactions	For the purchase order received into project event.
WFM_TRANSACTIONS	WFM Transactions	For all workforce management related events including equipment installed, equipment in service, asset in service, asset out of service, and item move.

Create Business Users

Create business users as needed for Oracle Installed Base. To do so, you must create business users and assign them the responsibility of an Oracle Installed Base customer and the predefined role of CSI_END_USER, CSI_READ_ONLY_USER, or CSI_CUSTOMER_USER. A role is a combination of permissions, which enable specific access and update privileges. For descriptions of the roles and permissions that Oracle Installed Base supports, see Roles and Permissions, page B-1.

For details on creating users and assigning associated accounts, roles, and responsibilities, refer to the user management sections of the *Oracle Common Application Components User's Guide*.

To confirm your user management work, log in to the Oracle E-Business Suite login (jtflogin) with the user name and password that you established, and everything should be set. The accounts that you assigned should be what appear as the list of accounts associated with this user in the customer UI. It may be a subset because JTF shows all accounts regardless of active or inactive status whereas the Oracle Installed Base window shows only the active accounts that are associated with a user.

Create Agent Users

Create agent users as needed for Oracle Installed Base. To do so, you must create internal users and assign them the predefined CSI_NORMAL_USER role and the responsibility of an Oracle Installed Base user. A role is a combination of permissions, which enable specific access and update privileges. For more information, see Roles and Permissions, page B-1. For details on creating users and assigning associated

accounts, roles, and responsibilities, refer to the user management sections of the *Oracle Common Application Components User's Guide*.

To confirm your user management work, log in to the Oracle E-Business Suite login (jtflogin) with the user name and password that you established.

Schedule the Expire End Dated Instances Program

This program goes through the end dates set up for instances to be expired. If the end date is past due, then the instances are set to expire. Schedule this program to run at least once a day:

Steps

1. Login as Oracle Install Base Admin in the Forms mode.

   The Navigator window appears.

2. Choose Others > Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Expire End Dated Instances.

5. Click OK.

6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.

8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

Schedule the Install Base Open Interface Program

This program imports significant volumes of data into Oracle Installed Base application tables through its mass load feature. Through its incremental load feature, it synchronizes Oracle Installed Base with subsystems by importing item instances from different feeder systems on a frequent, ongoing basis. Through its change functionality, it automates the process of adding as well as updating changes to the attributes of item instances. It also validates imported data to ensure data integrity with Oracle

applications.

Steps

1. Login as Oracle Install Base Admin in the Forms mode.

   The Navigator window appears.

2. Choose Others > Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select either Install Base Open Interface or Install Base Open Interface - Parallel Concurrent Workers.

5. Click OK.

6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.

8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

Run the Initiate Mass Edit Program

This is the program that is called automatically to run the mass edit sessions. Schedule it to run at a regular interval to pick up mass update and edit sessions due to be processed.

Steps

1. Login as Oracle Install Base Admin in the Forms mode.

   The Navigator window appears.

2. Choose Others > Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select the Initiate Mass Edit value.

5. If you want to run a single batch only, enter the Batch Name as a parameter; if you leave the Batch Name blank, the concurrent request will run all waiting batches.

6. Click OK.

7. In the At these Times region, click Schedule.

   The Schedule window appears.

8. Select the desired running schedule.

9. Click OK.

   The Installed Base Requests window appears.

10. Click Submit.

Schedule the Process Old Order Lines-Fulfillable Only Program

This program processes the old fulfillable order lines migrated from previous versions of Oracle Installed Base. Run it once or twice a day for the month after you migrate. To schedule the program:

Steps

1. Login as Oracle Install Base Admin in the forms mode.

   The Navigator window appears.

2. Select Others > Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Process Old Order Lines-Fulfillable Only.

5. Click OK.

6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.

8. Click OK.

The Installed Base Requests window appears.

9. Click Submit.

Schedule the Resubmit Interface Process

This program processes the transactions in the Error processing table. It can be set up to process selected lines or all lines in the table. This program can be called to run by user request or can set up to run at a regular interval. To schedule the program:

Steps

1. Login as Oracle Install Base Admin in the forms mode.

   The Navigator window appears.

2. Choose Others > Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Resubmit Interface Process.

5. Click OK.

6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.

8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

Schedule the Resubmit Waiting Transactions Program

This program processes the transactions that are set as waiting status in the Oracle Installed Base update process. The program can be scheduled to run at a regular interval. To schedule the program:

Steps

1. Login as Oracle Install Base Admin in the forms mode.

The Navigator window appears.

2. Choose Others, Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Resubmit Waiting Transactions.

5. Click OK.

6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.

8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

Schedule the Install Base and Inventory Data Discrepancies Program

The Install Base and Inventory Data Discrepancies program picks up the discrepancy data from the tables of Oracle Installed Base and Oracle Inventory and displays it on a report. The program can be scheduled to run at a regular interval. To schedule the program:

Steps

1. Login as Oracle Install Base Admin in the forms mode.

   The Navigator window appears.

2. Choose Others > Requests.

   The Submit a New Request window appears.

3. Select Single Request, and click OK.

   The Installed Base Requests window appears.

4. From the Name LOV, select Install Base and Inventory Data Discrepancies.

5. Click OK.

6. In the At these Times region, click Schedule.

   The Schedule window appears.

7. Select the desired running schedule.

8. Click OK.

   The Installed Base Requests window appears.

9. Click Submit.

Final Synchronize On-Hand Balance with Oracle Inventory

To maintain life-cycle tracking for all items that are to be tracked in Oracle Installed Base, it maintains a mirror image of what is in Inventory. For new implementations of Oracle Installed Base, all on-hand quantities of the Oracle Installed Base trackable items were issued out of Oracle Inventory in the first step of the implementation checklist. Now you must receive them back into Oracle Inventory. You must ensure that the Service Fulfillment Manager queue is up and running before attempting this step. Oracle suggests that you use the miscellaneous receipt transaction in Inventory to do this step.

Refer to the steps in *Oracle Service Fulfillment Manager User Guide* to start and make sure that the Oracle Service Fulfillment Manager queue is up and running.

3

Implementation and Setup for Upgrade Users

This chapter covers the following topics:

- Introduction
- Product Dependencies and Requirements
- Setup Checklist for Upgrade Users

Introduction

This chapter provides implementation and setup information for users who have an earlier version of Oracle Installed Base and are upgrading to this version. Because you are an upgrade user, the application automatically updates much of your current setup. Therefore you are required to consider only a subset of the setup steps required for a new user.

Product Dependencies and Requirements

The following modules must be installed and set up for Installed Base to work. Refer to the appropriate guides to install and set up these modules:

- Oracle Inventory
- Oracle Asset Tracking
- Oracle Service Fulfillment Manager
- Oracle Order Management
- Oracle Purchasing (Optional)
- Oracle Accounts Receivable

- Oracle Work in Process (Optional)
- Oracle Bills of Material

Setup Checklist for Upgrade Users

The following table provides a checklist of setup steps for upgrade users of Oracle Installed Base.

Step Number	Title	Required or Optional	Seeded?	Extensible?
1.	Set Up Inventory Serial Control at the Master Level, page 2-6	Required	NA	NA
2.	Set Up Oracle Installed Base Items in the Item Master, page 2-6	Required	NA	NA
3.	Set Up Vendors, page 2-7	Optional	N	N
4.	Set Up Employees, page 2-7	Optional	N	N
5.	Verify the Setup of the Oracle Service Fulfillment Manager Event Queue, page 2-8	Required	N	N
6.	Set Up the Action Menu in Oracle Order Management, page 2-8	Required	N	N
7.	Set Up the Order Management Workflow for Non-Shippable Items, page 2-9	Required	N	N
8.	Run the License Manager Program, page 2-12	Required	N	N
9.	Verify the Setup of Four Profile Options for Oracle Asset Tracking, page 2-13	Required	N	N
10.	Verify Location IDs in HZ_LOCATIONS, page 2-13	Required	Y	N
11.	Verify Codes for Asset Update Statuses, page 2-13	Optional	Y	N

Step Number	Title	Required or Optional	Seeded?	Extensible?
12.	Set Up Codes for Party-Account and Party-Contact Relationship Types, page 2-18	Required	Y	Y
13.	Verify Codes for Instance Relationship Types, page 2-19	Required	Y	N
14.	Verify Extended Attribute-Level Codes, page 2-20	Required	Y	N
15.	Set Up Extended Attribute Pools, page 2-20	Optional	N	Y
16.	Set Up Extended Attribute Classifications, page 2-21	Optional	N	Y
17.	Set Up Extended Attributes, page 2-21	Optional	N	Y
18.	Verify Accounting Classification Codes, page 2-21	Required	Y	N
19.	Verify Codes for Instance Location Sources, page 2-22	Required	Y	N
20.	Verify Party Sources, page 2-23	Required	Y	N
21.	Set Up Codes for Instance-Operating Unit Relationship Types, page 2-24	Required	Y	Y
22.	Set Up the Transaction Subtypes LOV from Non-Service Processes, page 2-38	Required	Y	N
23.	Verify Transaction Error Source Types, page 2-39	Required	Y	N
24.	Verify Oracle Configurator Enabled Values, page 2-26	Required	Y	N
25.	Verify Instance Class Values, page 2-26	Required	Y	N

Step Number	Title	Required or Optional	Seeded?	Extensible?
26.	Verify Values for the Resubmit Interface Process, page 2-27	Required	Y	N
27	Verify Values for CSI: Propagate Systems Changes, page 2-27	Required	Y	N
28.	Set Up Regions for the Advanced Search Page, page 2-28	Optional	Y	N
29.	Set Up the Results of the Search Item Instances Page, page 2-29	Optional	Y	N
30.	Create Business Users, page 2-40	Required	N	N
31.	Create Agent Users, page 2-40	Required	N	N
32.	Schedule the Expire End Dated Instances Program, page 2-41	Required	N	N
33.	Schedule the Installed Base Open Interface Program, page 2-41	Required	N	N
34.	Run the Initiate Mass Edit Program, page 2-42	Required	N	N
35.	Schedule the Process Old Order Lines-Fulfillable Only Program, page 2-43	Required	N	N
36.	Schedule the Resubmit Interface Process, page 2-44	Required	N	N
37.	Schedule the Resubmit Waiting Transactions Program, page 2-44	Required	N	N
38.	Schedule the Installed Base and Inventory Data Discrepancies Program, page 2-45	Required	N	N

After upgrading, you must run the concurrent program: **Program to initiate operational status update**. The program requires no parameters. Run this program after logging in with the Oracle Installed Base Admin responsibility.

This program will populate the Operational Status field with the appropriate values. These values are used for Oracle Asset Tracking. If you are not using Oracle Asset Tracking or if the instance is not an asset, the value populated will be 'Not Used'. See Oracle Asset Tracking Public Package, Oracle Asset Tracking API, *Oracle Asset Tracking Implementation Guide* for information regarding the status codes.

4

Oracle Installed Base Functions

Oracle Installed Base Functions

Function Name:

CSI_FS_INSTANCE_SEARCH_VIEW

User Function Name:

View Instance Search

Meaning:

Users cannot search item instances in Installed Base. Users may be able to work with individual instances.

Page/Tab/Region	If not accessible?
Instance Search Results page	Throw error.
System search page	View Active Item Instances and View All Item Instances columns are shown.

Function Name:

CSI_FS_INSTANCE_DETAILS_VIEW

User Function Name:

View All Instance Details

Meaning:

Users can only search instances and are able to view instance details, that are available in the summary page.

Page/Tab/Region	If not accessible?
Instance Details	Throw error.
Instance Search Results page	Update column is not available. Page is shown as read-only. Link to instance details is disabled. Expire and Create buttons are not available. Integration to Instance Details, Owner and Counter pages is not available.
System: Active Item Instances	Update column is not available. Navigation through drop-down is not available. Link to instance details is disabled. Expire and Create buttons are not available.
System: All Item Instances	Update column is not available. Navigation through drop-down is not available. Link to instance details is disabled. Expire and Create buttons are not available.

Function Name:

CSI_FS_INSTANCE_DETAILS_UPDATE

User Function Name:

Update All Instance Details

Meaning:

Users can view instance details, but cannot update.

Page/Tab/Region	If not accessible?
Instance Search Results page	Update column is not available. Navigation through drop-down is available. Page is shown as read-only. Expire and Create buttons are available.
Instance Details page	Make page including all sub-tabs read-only.
Counters page	Page is shown as read-only.
Notes page	Page is shown as read-only.
Operating Units page	Page is shown as read-only.
System: Active Item Instances	Update column is not available. Navigation through drop-down is available. Page is shown as read-only. Expire and Create buttons are available.
System: All Item Instances	Update column is not available. Navigation through drop-down is available, and page appears as read-only. Expire and Create buttons are available.

Function Name:

CSI_FS_INSTANCE_EXPIRE

User Function Name:

Allow Expire Item Instance

Meaning:

Users will not be able to expire item instances.

Page/Tab/Region	If not accessible?
Instance Search Results page	Hide Expire button.
System > Active Item Instances	Hide Expire button.
System > All Item Instances	Hide Expire button.

Function Name:

CSI_FS_INSTANCE_EXPORT

User Function Name:

Allow Export Item Instance List

Meaning:

Users cannot export the instance search results to a .csv format.

Page/Tab/Region	If not accessible?
Instance Search Results page	Hide Export button.
System: Active Item Instances	Hide Export button.
System: All Item Instances	Hide Export button.

Function Name:

CSI_FS_INSTANCE_CREATE

User Function Name:

Create Item Instance

Meaning:

Users cannot create an item instance manually.

Page/Tab/Region	If not accessible?
Instance Search Results page	Hide Create button.
Instance Details page	Hide Create link.
Configuration tab	Hide the Create Child column.
System > Active Item Instances	Hide Create Instance button.
System > All Item Instances	Hide Create Instance button.

Function Name:

CSI_FS_GENERAL_VIEW

User Function Name:

View General Attributes

Meaning:

Users cannot view general attributes.

Page/Tab/Region	If not accessible?
Instance Details page	Hide General tab.
Instance Search Results page	Hide Serial Number, Status, Quantity, and Start Date columns. Hide Serial Number and System search fields from simple search.
Advanced Search page	Hide Serial Number and System search fields.

Function Name:

CSI_FS_GENERAL_UPDATE

User Function Name:

Update General Attributes

Meaning:

Users cannot view general attributes.

Page/Tab/Region	If not accessible?
General Attributes tab	Make all the items in General tab as read-only.

Function Name:

CSI_FS_INSTANCE_LOCATIONS_VIEW

User Function Name:

View All Instance Locations

Meaning:

Users cannot view or change any owner information.

Page/Tab/Region	If not accessible?
Instance Advanced Search page	Hide Location search for all locations.
Instance Details page	Hide Location tab.
Change Owner page	Hide Bill to and Ship to Location regions.

Function Name:

CSI_FS_CURRENT_LOCATION_VIEW

User Function Name:

View Current Location

Meaning:

Users cannot view the current location.

Page/Tab/Region	If not accessible?
Instance Advanced Search page	Hide Current Location
Instance Details page	Hide Current Location

Function Name:
CSI_FS_CURRENT_LOCATION_UPDATE

User Function Name:
Update Current Location

Meaning:
Users cannot change the current location.

Page/Tab/Region	If not accessible?
Update Item Instance page	Make Current Location read-only.

Function Name:
CSI_FS_INSTALL_LOCATION_VIEW

User Function Name:
View Install Location

Meaning:
Users cannot view the install location.

Page/Tab/Region	If not accessible?
Instance Advanced Search page	Hide Install Location.
Instance Details page	Hide Install Location.

Function Name:
CSI_FS_INSTALL_LOCATION_UPDATE

User Function Name:
Update Install Location

Meaning:
Users cannot change the install location.

Page/Tab/Region	If not accessible?
Instance Details page	Make Install Location read-only.

Function Name:
CSI_FS_BILLTO_LOCATION_VIEW

User Function Name:
View Bill To Location

Meaning:
Users cannot view the bill to location.

Page/Tab/Region	If not accessible?
Instance Advanced Search page	Hide Bill To Location
Instance Details page	Hide Bill To Location

Function Name:
CSI_FS_BILLTO_LOCATION_UPDATE

User Function Name:
Update Bill To Location

Meaning:
Users cannot change the bill to location.

Page/Tab/Region	If not accessible?
Instance Details page	Make Bill to Location read-only.
Change Owner page	Make Bill to Location read-only.

Function Name:
CSI_FS_SHIPTO_LOCATION_VIEW

User Function Name:
View Ship To Location

Meaning:
Users cannot view the ship to location.

Page/Tab/Region	If not accessible?
Instance Advanced Search page	Hide Ship To Location.
Instance Details page	Hide Ship To Location.

Function Name:
CSI_FS_SHIPTO_LOCATION_UPDATE

User Function Name:
Update Ship To Location

Meaning:
Users cannot change the ship to location.

Page/Tab/Region	If not accessible?
Instance Details page	Make Ship To Location read-only.
Change Owner page	Make Ship To Location read-only.

Function Name:
CSI_FS_ASSOCIATIONS_VIEW

User Function Name:
View Associations

Meaning:
Users cannot view the association information.

Page/Tab/Region	If not accessible?
Instance Details page	Hide the Associations tab.

Function Name:
CSI_FS_ASSOCIATIONS_ADD

User Function Name:
Add Associations

Meaning:
Users cannot add an association.

Page/Tab/Region	If not accessible?
Update Item Instance page > Association tab	Hide the Add Association button.

Function Name:
CSI_FS_ASSOCIATIONS_UPDATE

User Function Name:
Update Associations

Meaning:
Users cannot update an association.

Page/Tab/Region	If not accessible?
Update Item Instance page > Association tab	Hide the Update Association column.

Function Name:
CSI_FS_CONTACTS_VIEW

User Function Name:
View Contacts

Meaning:
Users cannot view the contact information for any association.

Page/Tab/Region	If not accessible?
Instance Details page	Hide Contacts table.

Function Name:
CSI_FS_CONTACTS_ADD

User Function Name:
Add Contacts

Meaning:
Users cannot add a contact.

Page/Tab/Region	If not accessible?
Association tab	Hide Add Contact button.

Function Name:
CSI_FS_CONTACTS_UPDATE

User Function Name:
Update Contacts

Meaning:

users cannot update contacts for any association.

Page/Tab/Region	If not accessible?
Association tab	Hide Update Contacts column.

Function Name:

CSI_FS_ACCOUNTS_VIEW

User Function Name:

View Accounts

Meaning:

Users cannot view the account information for any association.

Page/Tab/Region	If not accessible?
Instance Details page	Hide Accounts table.

Function Name:

CSI_FS_ACCOUNTS_ADD

User Function Name:

Add Accounts

Meaning:

Users cannot add an account.

Page/Tab/Region	If not accessible?
Associations tab	Hide Add Account button.

Function Name:

CSI_FS_ACCOUNTS_UPDATE

User Function Name:

Update Accounts

Meaning:

Users cannot update the contacts for any association.

Page/Tab/Region	If not accessible?
Association tab	Hide Update Accounts column.

Function Name:

CSI_FS_CONTRACTS_VIEW

User Function Name:

View Contracts

Meaning:

Users cannot view the contract information.

Page/Tab/Region	If not accessible?
Instance Details page	Hide Contracts link.

Function Name:

CSI_FS_ORDERS_VIEW

User Function Name:

View Orders

Meaning:

Users cannot view the order information.

Page/Tab/Region	If not accessible?
Instance Details page	Hide Orders link.

Function Name:
CSI_FS_SERVICE_REQ_VIEW

User Function Name:
View Service Requests

Meaning:
Users cannot view the service request information.

Page/Tab/Region	If not accessible?
Instance Details page	Hide the Service Request tab.

Function Name:
CSI_FS_SERVICE_REQ_CREATE

User Function Name:
Create Service Requests

Meaning:
Users cannot create a service request.

Page/Tab/Region	If not accessible?
Instance Details page	Hide the Create Service Request link.

Function Name:
CSI_FS_REPAIR_ORDERS_VIEW

User Function Name:
View Repair Orders

Meaning:
Users cannot view repair orders.

Page/Tab/Region	If not accessible?
Service Request tab	Hide Repair Orders region.

Function Name:
CSI_FS_CONFIGURATION_VIEW

User Function Name:
View Configuration

Meaning:
Users cannot view any configuration information.

Page/Tab/Region	If not accessible?
Instance Details page	Hide Configuration sub-tab.

Function Name:
CSI_FS_CONFIGURATION_UPDATE

User Function Name:
Update Configuration

Meaning:
Users cannot change any configuration information.

Page/Tab/Region	If not accessible?
Configuration tab	Hide Add Child column. Hide Create Child column. Hide Expire Relationship button.

Function Name:
CSI_FS_COUNTERS_VIEW

User Function Name:

View Counters

Meaning:

Users cannot view any counter information.

Page/Tab/Region	If not accessible?
Instance Details page	Hide Counter link button.
Counters page	Throw error.

Function Name:

CSI_FS_COUNTERS_UPDATE

User Function Name:

Update Counters

Meaning:

Users cannot change the counters information.

Page/Tab/Region	If not accessible?
Counters page	Make the master table read-only. Make the Reading region read-only. Hide the Add and Apply buttons.

Function Name:

CSI_FS_TXN_HISTORY_VIEW

User Function Name:

View Transactional History

Meaning:

Users cannot view the transactional history.

Page/Tab/Region	If not accessible?
Instance Details page	Hide the Transactional History link.
Transaction pages	Throw error.

Function Name:
CSI_FS_INSTANCE_HISTORY_VIEW

User Function Name:
View Instance History

Meaning:
Users cannot view instance history.

Page/Tab/Region	If not accessible?
Instance Details page	Hide the Item Instance History link.
Instance History pages	Throw error.

Function Name:
CSI_FS_OPERATING_UNIT_VIEW

User Function Name:
View Operating Units

Meaning:
Users cannot view operating units information.

Page/Tab/Region	If not accessible?
Instance Details page	Hide the Operating Units link.
Operating Units page	Throw error.

Function Name:
CSI_FS_OPERATING_UNIT_UPDATE

User Function Name:
Update Operating Units

Meaning:
Users cannot update the operating unit information.

Page/Tab/Region	If not accessible?
Operating Units page	Make the Operating Units table read-only. Hide the Add, Remove, Cancel and Apply buttons.

Function Name:
CSI_FS_SYSTEMS_VIEW

User Function Name:
View Systems

Meaning:
Users cannot view systems.

Page/Tab/Region	If not accessible?
System Search page	Throw error.
Instance Details page	Hide system information.
Instance Search page	Hide System column.

Function Name:
CSI_FS_SYSTEMS_CREATE

User Function Name:
Create Systems

Meaning:
Users cannot create systems.

Page/Tab/Region	If not accessible?
System Search page	Hide Create button.
System Create page	Throw error.

Function Name:
CSI_FS_SYSTEMS_UPDATE

User Function Name:
Update Systems

Meaning:
Users cannot update systems.

Page/Tab/Region	If not accessible?
System Search page	Hide Update column.
System General page	Throw error.

Function Name:
CSI_FS_TRANSACTIONS_VIEW

User Function Name:
View Transactions

Meaning:
Users cannot view transactions.

Page/Tab/Region	If not accessible?
Transaction Search page	Throw error.
Instance Details page	Transaction link is available.

Sub Menu Name:

CSI_OA_VIEW_PERMISSION_SET

User Sub Menu Name:

Installed Base View Permission Set Menu

Meaning:

Contains all functions starting with CSI_FS_VIEW.

Instruction to Use:

If any product teams adds this sub-menu under any menu, they will be able to view data in the Installed Base pages.

Sub Menu Name:

CSI_OA_UPD_PERMISSION_SET

User Sub Menu Name:

Installed Base View Permission Set Menu

Meaning:

Contains all functions starting with CSI_FS_UPDATE or CSI_FS_CREATE.

Instruction to Use:

If any product team adds this sub-menu under any menu, they will be able to modify and create data in Installed Base pages.

Important Notes:

- Don't use Installed Base View Permission sets sub menu, as it contains many other view functions. So if any product team adds it, users will be able to access all pages as view only.
- If any product team passes OAFunc parameter, then call pages with OA.jsp?page=...

Then passed OAFunc will work as a Page Secured function and the whole function security would be performed against this parameter. Although you add View or Update permission sets, Installed Base will not render any components.

A

Oracle Installed Base System Profile Options and Debug Information

This appendix covers the following topics:

- Oracle Installed Base System Profile Options
- Setting the Debug Option

Oracle Installed Base System Profile Options

The following table describes the profile options for Oracle Installed Base. These profile options are to be set at the site level.

Profile Options for Oracle Installed Base

Profile Option Name	Category	Comments
CSI: Allow Install Parameter Update	Debug	*Use this profile option with great caution*. The default = N. Do not alter this setting unless instructed to do so as part of patching or by Oracle Customer Support or Development. Changing the default can cause irrecoverable data corruption. (This profile option is set to Y after migration to allow a *one-time* update to install parameters. Then it is set to N.) For more information, refer to the discussion of the Override Ownership check box in Set Up Installation Parameters, page 2-15.
CSI: Archive Block Size	Deployment	Defines the number of rows that are read and written as a unit during the internal processes of purging transaction history.
CSI: Auto-Generate System Name	Deployment	Auto-generate System Number at time of system creation (Y or N).
CSI: Auto-split Instances During Instantiation	Functional	Auto split instances with multiple quantity to 1 per instance at time of instance creation (Y or N).
CSI: BOM Explosion Level	Functional	Number of BOM levels to explode for creation of component-of configuration from BOM setup (1, 2, 3.). Note that BOM explosion stops at any level where child is at quantity > 1.

Profile Option Name	Category	Comments
CSI: Cascade System Termination	Functional	Cascade system termination to instances (Y or N).
CSI: Configurator Enabled	Deployment	Default = Network Models Only. Used for integration with the TSO solution and the Oracle Configurator product.
CSI: Contracts Enabled	Deployment	Enable Oracle Installed Base integration with Oracle Service Contracts (Y or N). If enabled, an instance will be included in the service contracts.
CSI: Counters Enabled	Debug	Enable Oracle Installed Base integration with Counters (Y or N).
CSI: Debug Level	Debug	For Debug, set at 9 or 10 for Debug to start.
CSI: Default Install Date with Ship or Fulfillment Date	Functional	Optionally populates installation date from the actual shipment/fulfillment date. Previously, the installation date for an item instance was based on the installation date specified in the Transaction Details window for a sales order line. If the date was not entered, then the installation date was left blank.
CSI: Default Instance Status	Functional	Default Instance Status at time of instance creation. Pick one status from the LOV.
CSI: Default Party Relationship Type for Party/Account Merge	Deployment	Provides a default value for party relationship type for party and account merge routines.

Profile Option Name	Category	Comments
CSI: Default Version Label	Functional	Default version label at time of instance creation. Pick one from the LOV.
CSI: Display HTML UI	Ul	Option to use Oracle Installed Base HTML for display (Internal). Used by other CRM applications to use the Oracle Installed Base HTML UI (Y or N).
CSI: Display Impacted Contracts	Functional	Controls the automatic display of a warning page indicating the impacted contracts, when changes to an item instance impact existing contracts. Does not affect the behavior of the View Impacted Contracts button.
CSI: Enable Contracts For Open Interface	Functional	Default = N. A setting of Y means that the Oracle Service Contracts application creates Service Warranties where applicable during an Open Interface run. Setting the profile option to N imports data faster than when it is set to Y.
CSI: Enable SQL Trace	Debug	For Debug (Y or N). Set to Y to start Debug.
CSI: ESRI Default Service	Functional	Specifies the default ESRI REST-based map service which will be used to initially launch the map page. This profile displays a list of all functions associated with the FND Form object ESRI_SERVICE_LINKS.

Profile Option Name	Category	Comments
CSI: Explode BOM	Functional	Enable BOM explosion for top assembly with Oracle Installed Base trackable components at time of shipment/fulfillment (Y or N).
CSI: Explode BOM for Phantom ATO Option Item	Functional	Determines whether BOM for Phantom ATO Option item part of internally manufactured configuration needs to be exploded. Default or When Value is Null => Yes. Options => Yes and No. If Yes - Phantom Option Item BOM explosion for internally manufactured item will occur. If No - Phantom Option Item BOM explosion will not happen for internally manufactured Config Item. Eligible WIP issued instance part of config WIP job will come under phantom option item (as per BOM structure).
CSI: Filter Display of all Contracts	UI	Default = N. If set to Y, the application displays only active contracts.
CSI: Forms to SSWA Default Responsibility	UI	Default user for applications to launch HTML from forms. Default Installed Base User or from the LOV.
CSI: IB Tab - Query Only Root Instances	UI	Controls Installed Base tab search behavior in the Contact Center: defaults the value to the associated check box in the Find window.

Profile Option Name	Category	Comments
CSI: IB Tab - Query Threshold	UI	Controls Installed Base tab auto-query behavior in the Contact Center: shows the result set only if the query count is less than or equal to the profile option value. For other cases, you must use the Find window.
CSI: Ignore Counter time component introduced for Time Base Counter engine	Functional	Calculates counter reading based on the following statement: `==> runtime - previous_value_timestamp`
CSI: Instance Termination Status	Functional	Default Termination Status. Pick one from the LOV.
CSI: Log file Name	Debug	The name of the log file for Debug.
CSI: Log File Path	Debug	For Debug ('utl-file-dir' parameter in init.ora).
CSI: OA Default Selection of the View Dropdown	UI	Select a value to default the selection of view in the dropdown list of the item instance search summary page. Selecting this option will improve the usability by defaulting the more frequently used view.
CSI: OE Line Processing Delay	Deployment	Delay between OE line processing. Time between order line processing to allow for Oracle Installed Base update completion to avoid record locking. Recommended delay: 60 seconds.

Profile Option Name	Category	Comments
CSI: Open Interface Commit Record Limit	Deployment	Used to commit Open Interface transactions to the data base. Default = 1000.
CSI: Operating Unit Restriction	UI	This profile is applicable for the OA framework-based UI through the Oracle Installed Base Agent User responsibility. Used to restrict the CSI agent user to view only the products that belong to a particular operating unit. In addition, the user function name "Restrict Instance Search by Operating Unit" must be enabled at the responsibility's menu.
CSI: Override Instance Split for KIT Items	Functional	Used to override splitting (depending upon CSI Auto Split instance profile) of non-serial KIT Item with no IB trackable embedded exploded ATO under it. Default = Y. If 'Y', Splitting is overridden and If 'N', splitting occurs based on CSI Auto Split instance profile.
CSI: Process Old Fulfill Lines	Deployment	Enable the processing of old fulfill lines into Oracle Installed Base. If enabled, Oracle Installed Base will attempt to process Oracle Order Management fulfillment line and create and or update item instance.
CSI: Restrict LOV's on Site Usage.	UI	Default = N. Set at Site Level. For value = Y, the application restricts the Installed Locations LOV in the Systems page to customer addresses with locations identified as Install At.

Profile Option Name	Category	Comments
CSI: Show Expired Instances	UI	Default = N. Enables users to default the value of the Show Expired Products checkbox in the Advanced Search page. If the profile option value = Y, then the application shows all instances including expired products in the Oracle Installed Base UI.
CSI: Stop At Debug Errors	Deployment	Set to Y to start debug (Y or N).
CSI: System Name Update Allowed	Functional	System name update allowed after system name creation (Y or N).
CSI: UI Default Selection of View Details Dropdown	UI	Defines the default link populated in the 'speed menu' for summary results displayed in the Search Products page.
CSI: Use Parallel Mode	Functional	Determines which approach (SFM or Concurrent) to use in order to process order lines in Oracle Installed Base. If you set the profile option value to Yes, the IB Transaction Lines Import concurrent program will process the transaction lines.
CSI: Update Net Readings On Reset	Functional	Allows users to specify whether to update the Net reading on reset.

Profile Option Name	Category	Comments
SERVICE Master Inventory Validation Organization	--	Replaces the ASO: Product Organization profile option obsoleted in a prior release. During the upgrade process, the inventory organization specified in this profile is used to upgrade customer products manually created in Oracle Service. After upgrade, it is used to default the Organization field value in Oracle Installed Base pages.

Setting the Debug Option

Oracle Installed Base provides an option to write debug information in a log file. By default, the debug feature is turned off. To turn the debug option off, change the profile option CSI_DEBUG_LEVEL value to 0.

To enable the debug option, perform the following steps:

Steps

1. Change the value of profile option CSI_DEBUG_LEVEL to either 9 or 10.

2. Specify the value of the profile option CSI_LOGFILE_PATH to be the path of the directory on the server side where the log file should be written.

   You must choose the log file path from the list of paths defined for the parameter utl_file_dir in the init.ora file. Alternatively, you can run the SQL statement:

   - SELECT value FROM v$parameter WHERE name = 'utl_file_dir'.

3. Specify the value of profile option CSI_LOGFILE_NAME to be the name you want to give to the log file.

   The specified log file will be written in the CSI_LOGFILE_PATH directory on the server side, and all debug messages will be written to this file. Each message in the log file will have the session ID and username attached to it.

4. Use these settings as required:

   - CSI Stop At Debug Errors: Set to Y to start Debug.

- CSI Enable SQL Trace: Set to Y to start Trace.

B

Seeded Data

This appendix covers the following topics:

- Introduction
- Roles and Permissions

Introduction

This appendix lists the data that ships with Oracle Installed Base as seeded data, or data that is shipped "out-of-the-box."

The Roles and Permissions listed below are applicable for a JTT-based UI, which enables backward compatibility with earlier releases. You can use this UI through the Oracle Install Base User responsibility.

Roles and Permissions

Oracle Installed Base ships with four pre-defined roles, as shown in the following table.

Roles Supported by Oracle Installed Base

Role Code	Common Name of Role	Description
CSI_CUSTOMER_USER	Customer user	Has restricted permissions that are set up primarily for Oracle iSupport users. For example, this role does not allow such activities as instance status updates, party/account updates, ownership transfers, and counter adjustments, but does allow updates to contacts and counter values.
CSI_END_USER	End customer user	Has update permissions to change Oracle Installed Base data.
CSI_NORMAL_USER	Normal user	For internal agent users. Has update permissions to change Oracle Installed Base data.
CSI_READ_ONLY_USER	Read-only user	Applies to users who only need read-only access to Oracle Installed Base data.

A role is a combination of permissions. The following table shows the permissions supported by Oracle Installed Base.

Permissions Supported by Oracle Installed Base

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_ACCT_ACCESS_ONLY	Restricts the users access to Oracle Installed Base instances based on an Account	Y	N	Y	Y

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_ADDI_ATTR_UPDATE	Update permission for Additional Attributes page.	N	Y	Y	N
CSI_ADDI_ATTR_VIEW	View permission for Additional Attributes page	Y	Y	Y	Y
CSI_ALL_ACCT_ACCESS	Allows access to Oracle Installed Base instances across accounts and parties	N	Y	N	N
CSI_ASSET_UPDATE	Update permission for Asset page	N	Y	N	N
CSI_ASSET_VIEW	View permission for Asset page	Y	Y	N	N
CSI_CONTACT_DETAIL_UPDATE	Update permission for Contact Detail page (future use)	N	Y	Y	Y
CSI_CONTACT_DETAIL_VIEW	View permission for Contact Detail page	Y	Y	Y	Y

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_CONTRACT_UPDATE	Update permission for Contract page (future use)	N	Y	Y	N
CSI_CONTRACT_VIEW	View permission for Contract page	Y	Y	Y	Y
CSI_COUNTER_ADJUSTMENT	Access permission to adjust Counter readings	N	Y	Y	N
CSI_COUNTER_HISTORY_UPDATE	Update permission for validation flag in Counter History page	N	Y	Y	N
CSI_COUNTER_HISTORY_VIEW	View permission for Counter history	Y	Y	Y	Y
CSI_COUNTER_PROPERTIES_ACCES	Access permission to Counter properties	N	Y	Y	N
CSI_COUNTER_RESET	Access permission to perform Counter resets	N	Y	Y	N

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_COUNTER_UPDATE	Update permission for Counter page	N	Y	Y	Y
CSI_COUNTER_VIEW	View permission for Counter page	Y	Y	Y	Y
CSI_CREATE_INST_UPDATE	Permission for creating instance	N	Y	Y	N
CSI_CREATE_INST_VIEW	View permission for Create Instance page (future use)	N	Y	Y	N
CSI_CREATE_SYS_UPDATE	Permission for creating system	N	Y	N	N
CSI_CREATE_SYS_VIEW	View permission for csi Create System page (future use)	N	Y	N	N
CSI_CUSTOMER_VIEW	This permission should be assigned to any user that is a customer (obsoleted)	Y	N	Y	Y

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_DOWNLOAD	Access permission for the Download button instance search results	Y	Y	Y	Y
CSI_EXPIRE_INSTANCE	Users with this permission can change the instance's status to any terminable status, provided they also have the CSI_INST_STATUS_UPDATE permission.	N	Y	Y	N
CSI_GENERAL_ATTRIB_CUST_ONLY	Makes certain Customer instance attributes read only (future use)	N	N	Y	Y
CSI_INST_CONFIG_UPDATE	Update permission for Instance Config page	N	Y	Y	N
CSI_INST_CONFIG_VIEW	View permission for Instance Config page	Y	Y	Y	Y

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_INST_GENERAL_UPDATE	Update permission for Instance General page	N	Y	Y	Y
CSI_INST_GENERAL_VIEW	View permission for Instance General page	Y	Y	Y	Y
CSI_INST_NOTES_UPDATE	Permission to update the instance notes	N	Y	Y	N
CSI_INST_NOTES_VIEW	Permission to view the instance notes	Y	Y	Y	Y
CSI_INST_QUANTITY_UPDATE	Permission to update instance quantity	N	Y	Y	N
CSI_INST_STATUS_UPDATE	Permission to update instance status	N	Y	Y	N
CSI_LATEST_TRANSACTION_UPDATE	Update permission for Transaction History page (future use)	N	Y	Y	N
CSI_LATEST_TRANSACTION_VIEW	View permission for Transaction History page	Y	Y	Y	Y

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_OPERATING_UNIT	Security enhancement provided for HTML user interfaces: Restricts a user's access to records based on the user's operating unit. An item's Sold From organization is matched against the user's operating unit, and matching instances are displayed. If the Sold From organization is not set, then the item instance is not included in search results.	N	N	N	N
CSI_OPERATINGUNIT_UPDATE	Update permission for Operating Unit page	N	Y	N	N
CSI_OPERATINGUNIT_VIEW	View permission for Operating Unit page	Y	Y	N	N

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_ORGANIZATION_VIEW	Permission to view organization name	Y	Y	N	N
CSI_PARTY_ACCOUNT_UPDATE	Update permission for Party Account page	Y	Y	N	N
CSI_PARTY_ACCOUNT_VIEW	View permission for Party Account page	N	Y	N	N
CSI_PARTY_CONTACT_UPDATE	Update permission for Party Contact page	N	Y	Y	N
CSI_PARTY_CONTACT_VIEW	View permission for Party Contact page	Y	Y	Y	Y
CSI_PARTY_SUMMARY_UPDATE	Update permission for Party Summary page (future use)	N	Y	N	N
CSI_PARTY_SUMMARY_VIEW	View permission for Party Summary page	Y	Y	N	N
CSI_PARTY_UPDATE	Update permission for Party page	N	Y	N	N

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_PARTY_VIEW	View permission for Party page	Y	Y	N	N
CSI_PERZ_EDIT_UPDATE	Ability to update saved searches in Advanced Search page	Y	Y	Y	Y
CSI_PERZ_EDIT_VIEW	Ability to view saved searches in Advanced Search page	Y	Y	Y	Y
CSI_PRICING_UPDATE	Update permission for Pricing Attributes page	N	Y	Y	N
CSI_PRICING_VIEW	View permission for Pricing Attributes page	Y	Y	Y	N
CSI_PROPERTY_READ	Read the Instance Properties (future use)	Y	Y	Y	N
CSI_PROPERTY_UPDATE	Update the Instance Properties (future use)	N	N	N	N

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_REPAIR_ORDER_UPDATE	Update permission for Repair Order page (future use)	N	Y	Y	N
CSI_REPAIR_ORDER_VIEW	View permission for Repair Order page	Y	Y	Y	Y
CSI_SEARCH_ASSET_RES_UPDATE	Update permission for Search Asset Result page (future use)	N	Y	N	N
CSI_SEARCH_ASSET_RES_VIEW	View permission for Search Asset Result page	Y	Y	N	N
CSI_SEARCH_ASSET_UPDATE	Update permission for Search Asset page (future use)	N	Y	N	N
CSI_SEARCH_ASSET_VIEW	View permission for Search Asset page	Y	Y	N	N

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_SEARCH_PRODUCT_UPDATE	Update permission for Instance Search Results page, for example, ability to use Create, Expire, etc buttons	N	Y	Y	Y
CSI_SEARCH_PRODUCT_VIEW	View permission for Instance Search Results page	Y	Y	Y	Y
CSI_SEARCH_SYS_UPDATE	Update permission for System Search Results page, for example, ability to use Create, Update buttons	N	Y	N	N
CSI_SEARCH_SYS_VIEW	View permission for System Search Results page	Y	Y	N	N
CSI_SEARCH_TRANSACTION_UPDATE	Update permission for Search Transaction page (future use)	N	Y	N	N

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_SEARCH_TRANSACTION_VIEW	View permission for Search Transaction page	Y	Y	N	N
CSI_SERVICE_REQUEST_UPDATE	Update permission for Service Request page	N	Y	Y	Y
CSI_SERVICE_REQUEST_VIEW	View permission for Service Request page	Y	Y	Y	Y
CSI_SHOW_ALL_CONTACTS	Allows Oracle Installed Base User to view all types of contacts	Y	Y	N	N
CSI_SHOW_ALL_LOCATIONS	Allows the Oracle Installed Base user to view all types of locations, it overrides any restriction on location such as CSI_SHOW_EXT_LOCATIONS, CSI_SHOW_EXT_LOCN_PROD	Y	Y	N	N

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_SHOW_ALL_PARTIES	Allows the user to View all types of parties including Employees etc CSI	Y	Y	N	N
CSI_SHOW_EXT_CONTACTS	Restricts Oracle Installed Base User to view only the external contacts	Y	N	Y	Y
CSI_SHOW_EXT_LOCATIONS	Restricts the Oracle Installed Base user to view only external locations	Y	N	Y	Y
CSI_SHOW_EXT_LOCN_PRD_ONLY	Security enhancement provided for HTML user interfaces: Restricts a user to be able to retrieve only those records that are customer-items located at external sites.	N	N	N	N

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_SHOW_EXT_PARTIES	Restricts the user to View only the External parties (future use)	Y	N	Y	Y
CSI_SHOW_INST_CUSTOMER_MENU	Permission to display the Installed Base Customer facing instance details Menu	Y	N	Y	Y
CSI_SHOW_INST_MENU	Permission to display the Installed Base Agent facing instance details Menu	N	Y	N	N
CSI_SPLIT_QUANTITY_UPDATE	Update permission for Split Quantity page	N	Y	Y	N
CSI_SPLIT_QUANTITY_VIEW	View permission for Split Quantity page	N	Y	Y	N
CSI_SYS_CFG_VIEW	View permission for System configurations	Y	Y	Y	Y

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_SYS_DTL_UPDATE	Update permission for System Detail page	N	Y	Y	Y
CSI_SYS_DTL_VIEW	View permission for System Detail page	Y	Y	Y	Y
CSI_TRANSACTION_DETAIL_UPDATE	Update permission for Transaction Detail page (future use)	N	Y	Y	N
CSI_TRANSACTION_DETAIL_VIEW	View permission for Transaction Detail page	Y	Y	Y	N
CSI_TRANSACTION_INSTANCE_UPDATE	Update permission for Instances For A Transaction page (future use)	N	Y	Y	N
CSI_TRANSACTION_INSTANCE_VIEW	View permission for Instances For A Transaction page	Y	Y	Y	Y
CSI_TRANSFER_OWNER_UPDATE	Update permission for Instance Owner page	N	Y	N	N

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_TRANSFER_OWNER_VIEW	View permission for Instance Owner page	Y	Y	N	N

C

Processing Errors

This appendix covers the following topics:

- Overview
- Using the Transaction Error Summary and Details Window
- Using the Installed Base and Inventory Data Discrepancy Program
- Using the Install Base Error Correction and Synchronization Program

Overview

Many Oracle applications have transactions that update Oracle Installed Base as part of their normal processing. This chapter describes how to perform corrective procedures to reprocess transactions that failed to update Oracle Installed Base successfully.

This chapter contains the following topics:

- Using the Transaction Error Summary and Details Window, page C-1
- Using the Installed Base and Inventory Data Discrepancy Program, page C-6
- Using the Installed Base Error Correction and Synchronization Program, page C-6

Using the Transaction Error Summary and Details Window

Overview

In the Transaction Error Summary and Details window you can reprocess transactions that failed to update Oracle Installed Base from certain Oracle applications.

Oracle Installed Base has the following integration points with Oracle applications through the Oracle Service Fulfillment Manager (SFM) Advanced Queue and Oracle Installed Base processing:

- Inventory receiving and purchase order receiving
- Inventory transactions
- Order management
- RMA receiving
- Sales order shipping
- Sales order fulfillment
- Fixed assets
- Projects
- Work in process
- Telco Service Ordering
- Intercompany drop shipments and PO adjustments

If a source transaction is successful and the Oracle Installed Base update errors-out, then the transaction appears with error text in the Transaction Error Summary and Details window. You can correct the error, typically using the Transaction Details window. Then you can select the transaction and reprocess it to update Oracle Installed Base. If the transaction is successful, then the error record is removed from error tables. Otherwise, the error record continues to be available in this window.

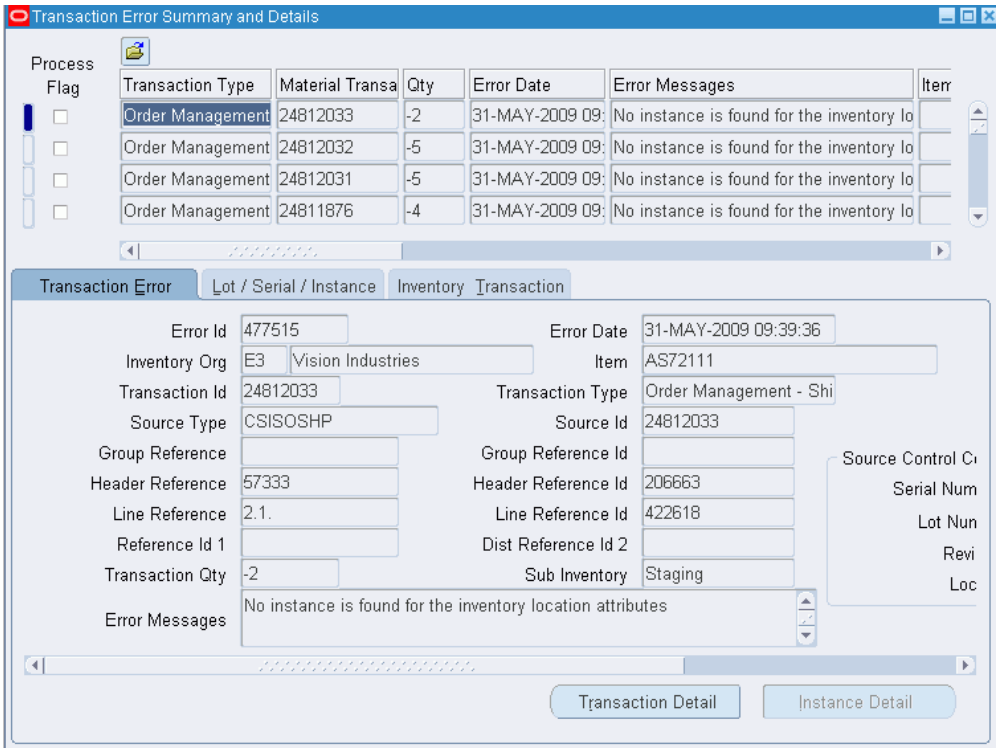
Use this procedure to reprocess a transaction.

Steps

1. From the Responsibilities menu of the Oracle Forms mode, select the Oracle Install Base Administrator responsibility, and click OK.
2. Navigate to Transaction Errors Processing.

   The Find Transaction Errors window appears and provides a wide range of search criteria.
3. Specify your search criteria, and click Find.

   The Transaction Error Summary and Details window appears.



4. Browse detailed information under the main Transaction Error Summary region, in the Transaction Error tab, the Lot/Serial/Instance tab, and Inventory Transaction tab, and through the Transaction Detail and Instance Detail buttons.

   The Transaction Detail button is available only for specific transaction errors: OM shipments, RMA receipts, and RMA fulfillment (cancellation) where transaction details have previously been entered in source transactions.

   The Instance Detail button is available only where item instances already exist for the error transaction.

5. Correct the transaction.

   For example, if you receive an error for an RMA fulfillment transaction: "Transaction details are mandatory for cancellation / RMA fulfillment," then click Transaction Detail and enter instance number information in the Transaction Details window.

6. Select the corrected transaction to be reprocessed by selecting its Process Flag check box.

7. Save the data to commit the changes.

8. From the main Functions menu, select Others > Requests.

9. Choose the Resubmit Interface Process concurrent program from the LOV.

10. Choose the Selected parameter to process selected transactions.

11. Submit the request.

12. Optionally, schedule this job to run at regular intervals.

The following table describes the fields in the Transaction Error Summary and Details window.

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

Location in the Window	Field	Description
Top	Source Type	The source of the transaction type. It provides more details for the transaction type. For example, if the transaction type is INTERORG_TRANSFER, then the source information type is MTL_MATERIAL_TRANSACTIONS. Some of the possible Source Info types are ASSET_CREATION, ASSET_MOVE, CSISOSHP, MTL_MATERIAL_TRANSACTIONS, NORMAL_ITEM_ASSET, NORMAL_ITEM_EXP_ITEM, and WFM_TRANSACTIONS.
Top	Source Id	The transaction ID corresponding to the Oracle Installed Base transaction if the source is not Inventory.
Transaction Error Tab	Header Reference	Represents the source transaction reference number. For example, if the source transaction originated from an Order Management sales order, then this field would provide the sales order number.
Transaction Error Tab	Header Reference Id	The document header ID, such as an order header ID.
Transaction Error Tab	Line Reference	The document line number, such as an order line number.
Transaction Error Tab	Line Reference Id	The document line ID, such as an order line ID.

Using the Installed Base and Inventory Data Discrepancy Program

Oracle Inventory and Oracle Installed Base can be out of synchronization for several reasons, of which the following two are the most important:

- The Install Base Tracking check box may have been selected and cleared several times for the same item, thus leading to a discrepancy between information that the two applications show.
- The SFM Event Manager was not set properly and hence some Oracle Inventory transactions were not tracked.

The Install Base and Inventory Data Discrepancies program picks up the discrepancy data from the tables of Oracle Installed Base and Oracle Inventory and displays it on a report. A separate concurrent program, Install Base Error Correction and Synchronization Program, is available to correct the discrepancies.

Also, Oracle Installed Base provides a notification to an end user if any discrepancy between Oracle Installed Base and Oracle Inventory occurs. This is accomplished by using an Oracle alert. The notification generally is in the form of a text message, which is sent to the user either by e-mail or paging.

Use this procedure to run the program.

Steps

1. Using the Oracle Install Base Admin responsibility, navigate to Others > Requests.

   The Submit a New Request window appears.

2. Select Single Request, and click OK.

   The Installed Base Requests window appears.

3. From the Name LOV, select Install Base and Inventory Data Discrepancies, and click OK.

4. As required, click Help for online help in completing the submission of your request.

Using the Install Base Error Correction and Synchronization Program

Install Base Error Correction and Synchronization Program is a concurrent program to correct and reprocess the transactions that failed to update item instances in Oracle Install Base. These are the errored transactions that you can view through the Transaction Error Summary and Details window in the application. The transactions could have errored for many reasons including, but not limited to, using unsupported transactions.

Important: The Install Base Error Correction and Synchronization Program should be run only if suggested by Oracle after the review of an error backlog.

Use this procedure to run the Install Base Error Correction and Synchronization Program.

Install Base Data Correction and Synchronization Program - Routine Fixes

This table details the routine fixes performed by the Install Base Data Correction and Synchronization Program.

Routine Name	Description
DELETE_DUP_RELATIONSHIP	Deletes duplicate COMPONENT-OF relationships created in CSI_II_RELATIONSHIPS during migration.
UPDATE_NO_CTL_SRL_LOT_INST	Corrects the item instances that are having serial/lot numbers but not having the right item set up.
DELETE_DUP_SRL_INV_INSTANCE	Deletes the duplicate serialized inventory instances that were created during migration.
UPDATE_DUP_SRL_INSTANCE	Updates duplicate serialized instances. Certain rules will be applied on these item instances in order to retain unique combination of Item-Serial. Rest of the same would be updated with '-DUP' and expired.
DEL_API_DUP_SRL_INSTANCE	These were wrongly created by an API bug. Out of the multiple combinations of Item-Serial, the latest would be retained and the rest of them would be suffixed with '-DUP' and expired.
UPDATE_INSTANCE_USAGE	Populates the appropriate instance usage code for instances having a null value in instance_usage_code.
UPDATE_FULL_DUMP_FLAG	Updates Full_dump_flag for migrated Relationship and System history records.

Routine Name	Description
UPDATE_VLD_ORGANIZATION	Updates the last_vld_organization_id same as inv_organization_id for instances residing in INVENTORY location.
UPDATE_REVISION	Updates the inventory_revision for instances whose items are revision controlled but having a null revision.
MERGE_NON_SRL_INV_INSTANCE	Merges the non-serial inventory instances residing at the same inventory location. These were mainly created the SFM thread parameter set to > 1.
DELETE_DUP_ACCOUNT	Deletes duplicate OWNER party account of an item instance.
UPDATE_INSTANCE_PARTY_SOURCE	Updates the Item Instance owner party source.
UPDATE_CONTACT_PARTY_RECORD	Updates the contact party records with the right value based on the party rules.
REVERT_PARTY_REL_TYPE_UPDATE	Updates the Party and Account records that were wrongly updated by integration.
UPDATE_MASTER_ORGANIZATION_ID	Updates the Master organization ID with the right value corresponding to the last_vld_organization_ID.
MISSING_MTL_TXN_ID_IN_CSI	Updates the missing inventory master transaction ID in CSI_TRANSACTIONS for RMA transactions.
FIX_WIP_USAGE	Updates the instance usage code for the instances residing in the WIP location.
DELETE_DUP_NSRL_WIP_INSTANCES	Deletes duplicate non-serial instances residing in WIP location.
DELETE_DUP_ORG_ASSIGNMENTS	IB maintains a unique relationship type for each item instance irrespective of operating unit. This script deletes the duplicate ones created.

Routine Name	Description
EXPIRE_NON_TRACKABLE_INSTANCE	Expires the active item instances whose items are no longer IB trackable. Also marks the CSI transactions in the error table so that they are not processed.

In addition, when the data correction program runs in C mode, the program also goes through each error transaction and tries to correct it by moving the instances into the correct location then resubmits the transaction.

Steps

1. Using the Oracle Install Base Admin responsibility, navigate to Others > Requests.

   The Submit a New Request window appears.

2. Select Single Request, and click OK.

   The Installed Base Requests window appears.

3. From the Name LOV, select Install Base Error Correction and Synchronization Program, and click OK. The Parameters window appears.

4. Select the desired value for the Mode of Execution parameter.

   Valid values for Mode of Execution are defined as follows:

   1. R: Report bad setup and data issues that need manual correction.

   2. C: Correct and reprocess only the errored transactions.

   3. S: Correct and reprocess the errored transactions and resynchronize item instances in Oracle Installed Base with the inventory-on-hand balance to prevent possible future errors.

      Oracle recommends that you run this program in the following sequence:

   4. Run the program in mode R to generate the reports, and then manually correct the setup and data until the reports show no more discrepancies.

   5. Next run the program in mode C for at least few iterations, such as three to four, or until no more errored transactions remain to process.

   6. Finally run the program in mode S to synchronize Oracle Installed Base and Oracle Inventory.

5. Select the desired value for Show Instances.

This parameter is used for generating the Non Serialized Items RMA report. This report lists all the RMA receipts that errored out in Oracle Installed Base because the mandatory item instance references for the non-serialized items were not entered in the Oracle Installed Base transaction details. Valid values for Show Instances are as follows:

1. N: Only the RMA transaction details are listed.

2. Y: All the appropriate item instances that can be used to reference in transaction details are also listed.

   Oracle recommends that you run the program with the Y option for at least the first iteration.

6. Click OK. You are returned to the main window.

7. As required, click Help for online help in completing the submission of your request.

The following applies only when the program is run in the synchronization mode:

1. You must shut down the SFM event manager queue before you run an iteration in the synchronization mode. Any Oracle Installed Base related messages that are still pending in the SFM queue are then dequeued and processed by the correction program.

2. To get a consistent snapshot of the inventory on-hand balance, the program while running in the synchronization mode creates a trigger, CSI_BLOCK_MAT_TXN_TRG, on the Oracle Inventory mtl_material_transactions table to block any transactions that are performed in Oracle Inventory for an Oracle Installed Base trackable item. After the program completes, this trigger is dropped, and you then need to reprocess any such failed inventory transactions using the standard error submission UIs provided by Oracle Inventory.

3. Start the SFM event manager queue back after the program completes.

The following section contains information about the reports that the program produces.

Error Correction Reports

Title

IB Trackable Flag Discrepancy Report

Description

This report lists all the Items that have a value for the Track in Installed Base flag set differently in child inventory organizations than in the master inventory organization.

When to Correct

Before you can run the program in the Correction mode.

How to Correct

Installed Base Tracking must be set up and controlled at the inventory item master organization. If this is not the case, then business users must verify and appropriately decide which items to track or not to track. To achieve this:

1. Apply Oracle Inventory Patch 3038264. This patch honors the value on the inventory master organization for the Installed Base Tracking flag and applys it on all the child inventory organizations.

2. You may then want to use the Inventory item master window to verify and correct, if required, the Installed Base Tracking flag for these items. You may have to deplete Inventory on-hand balances to zero to update the flag.

Title

Serial Number Uniqueness Violation Across Inventory Organizations Report

Description

This condition occurs when the serial number uniqueness in Oracle Inventory is defined as Across Organizations and you manually create the item instance with a specific serial number in Oracle Installed Base and then transact the same serial number in inventory for a different item. This report lists all such item instances and their serial numbers.

When to Correct

Before you can run the program in the Synchronization mode.

How to Correct

Business users must validate the serial numbers in question here and retain the valid one. One possible way to achieve this is to prefix or suffix the serialized instance in Oracle Installed Base, which in most cases is a manually created customer item, and or expire any of them if they were created inappropriately. You can use the public APIs provided by Oracle Installed Base can to perform this.

Title

Report on RMAs for Non Serialized Items Which Have No Item Instance References

Description

For non-serial items, providing an item instance reference in transaction details is mandatory. This report lists all such RMAs that errored because they do not have an item instance referenced in transaction details for that RMA line. It also shows those there is no transaction detail entered.

When to Correct

Before you can run the program in the Synchronization mode.

How to Correct

The report has a parameter Show Instances, which is prompted at the time of execution of the correction program. A value of Y displays the list of instances that can be referenced for the errored RMA Lines. Business users should look at the list of instances and then do the following:

1. With the Order Management responsibility, navigate to Sales Order > Lines > Actions (Installation Details UI) to create or update the transaction detail and then reference the appropriate instances.

2. With the Oracle Install Base Admin responsibility, navigate to the Transactions error reprocessing UI and mark all the corrected RMA errors for reprocessing.

D

Installed Base Concurrent Programs

This appendix covers the following topics:

- Installed Base Concurrent Programs - Listing

Installed Base Concurrent Programs - Listing

The following table contains the concurrent programs for Oracle Installed Base.

Concurrent Program ID	User Concurrent Program Name	Description	Execution Method*	Output Format
CSIRSUBI	Resubmit Interface Process	Resubmit Interface Process	I	Text
CSIINME	Initiate Mass Edit	Initiate Mass Edit	I	Text
CSIWAITT	Resubmit Waiting Transactions	Resubmit Waiting Transactions	I	Text
CSIPROLD	Process Old Order Lines - Fulfillable only	Process Old Order Lines - Fulfillable only	I	Text
CSIUPDPF	Terminate Processing Old Fulfillable Order Lines - Update Profile	Terminate Processing Old Fulfillable Order Lines - Update Profile	I	Text

Concurrent Program ID	User Concurrent Program Name	Description	Execution Method*	Output Format
CSIEXEIN	Expire End Dated Instances	Expire End Dated Instances	I	Text
CSICPREP	CSI: Customer Products Summary Report	Customer Products Summary Report	P	Text
CSIMCPAW	Install Base Open Interface Parallel Instance Creation	This program is executed from another concurrent program to create instances based on the parallel worker ID.	I	Text
CSIMCOPB	Install Base Open Interface - Parallel Concurrent Workers	This Open Interface program is used to do initial loads of data into Install Base. This will use the concept of parallel concurrent workers	I	Text
CSIMCONB	Oracle Install Base Open Interface Process	This process will load records from interface tables to Install Base.	I	Text
GSICUSIB	CSI: Customer Install Base Report	Customer Install Base Report	P	Text
GSICCLBP	CSI: Customer Licence By Product	Customer Licence By Product	P	Text

Concurrent Program ID	User Concurrent Program Name	Description	Execution Method*	Output Format
GSISCBPR	CSI: Service Contracts By System Report	Service Contracts By System Report	P	Text
GSISYSDT	CSI: Systems Detail Report	Systems Detail Report	P	Text
GSIUNSIB	CSI: Unsupported Install Base Items Report	Unsupported Install Base Items Report	P	Text
GSIMLSC3	CSI: Mailing Label - Support Customers (IBOM)	For IBOM - Output file in " * " delimited format Output: Contact Name, Customer Name & Address Information	Q	Text
GSIMLSC2	CSI: Mailing Label - Support Customers (Comma Delimited)	Mailing label file in comma-delimited format (Supported Customers).	Q	Text
GSIMLSC1	CSI: Mailing Label - Support Customers (OLD BOM)	Output file in " * " delimited format. Output: Contact Name, Customer Name & Address Information	Q	Text
CSIPTYARCH	Install Base Instance Party Transaction History purge	Install Base Instance Party Transaction History purge	I	Text

Concurrent Program ID	User Concurrent Program Name	Description	Execution Method*	Output Format
CSICORSY	Install Base Error Correction and Synchronization Program	Install Base Error Correction and Synchronization Program	I	Text
CSIEXPIR	Call Contracts for Expired Item Instances	Call Contracts for Expired Item Instances	I	Text
CSIINVDISCR	Install Base and Inventory Data Discrepancies	Install Base and Inventory Data Discrepancies	I	Text
CSIINVDR	Install Base and Inventory Data Discrepancy Report	Install Base and Inventory Data Discrepancy Report	P	Text
CSITHPUR	Install Base Transaction History purge	Install Base Transaction History purge	I	Text
CSIACTARCH	Install Base Party Accounts Transaction History purge	Install Base Party Accounts Transaction History purge	I	Text
CSIOUARCH	Install Base Operating units Transaction History purge	Install Base Operating units Transaction History purge	I	Text
CSIEXTARCH	Install Base Extended attributes Transaction History purge	Install Base Extended attributes Transaction History purge	I	Text
CSIPRIARCH	Install Base Pricing attributes Transaction History purge	Install Base Pricing attributes Transaction History purge	I	Text

Concurrent Program ID	User Concurrent Program Name	Description	Execution Method*	Output Format
CSIASTARCH	Install Base Instance Assets Transaction History purge	Install Base Instance Assets Transaction History purge	I	Text
CSIVERARCH	Install Base Version labels Transaction History purge	Install Base Version labels Transaction History purge	I	Text
CSIRELARCH	Install Base Instance Relationships Transaction History purge	Install Base Instance Relationships Transaction History purge	I	Text
CSISYSARCH	Install Base Systems Transaction History purge	Install Base Systems Transaction History purge	I	Text
CSIINSARCH	Install Base Item Instances Transaction History purge	Install Base Item Instances Transaction History purge	I	Text
CSIUPRL	Install Base - Assign CSI* roles to existing users	Install Base - Assign CSI* roles to existing users	I	Text
CSIUPOPM	Install Base - Program to initiate operational status update	Install Base - Program to initiate operational status update	I	Text
CSIUPOPS	Install Base - Update operational status	Install Base - Update operational_status_code	I	Text

Concurrent Program ID	User Concurrent Program Name	Description	Execution Method*	Output Format
CSICTIM	Time Based Counters Engine	Engine to capture reading for time based counters	I	Text
CSICTRML	Install Base - Counter Readings Open Interface	Install Base - Counter Readings Open Interface	I	Text
CSITXIMP	IB TRANSACTION LINES IMPORT	IB TRANSACTION LINES IMPORT	I	Text
CSITXIMW	IB TRANSACTION LINES IMPORT Worker	IB TRANSACTION LINES IMPORT Worker	I	Text
CSIPTXND	Purge Transaction Detail Tables (CSI_T Tables)	Purge Transaction Detail Tables (CSI_T Tables)	I	Text
CSIMCREL	Open Interface Parallel Relationship Creation Program	Open Interface Parallel Relationship Creation Program	I	Text
CSIINVDR_XML	Install Base and Inventory Data Discrepancy Report (XML)	Install Base and Inventory Data Discrepancy Report	K	XML
CSICPREP_XML	CSI: Customer Products Summary Report (XML)	Customer Products Summary Report	K	XML

***Execution Method**

- **I** - PL/SQL Stored procedure

- **P** - Oracle Reports
- **Q** -SQL Reports
- **K** - Java Concurrent Program

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