

Oracle® Install Base

Implementation Guide

Release 11*i*

Part No. B14132-01

July 2004

ORACLE®

Oracle Install Base Implementation Guide, Release 11i

Part No. B14132-01

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Contents

Send Us Your Comments	vii
Preface.....	ix
1 Overview of Oracle Install Base	
1.1 Summary of Oracle Install Base	1-1
1.2 Features of Oracle Install Base.....	1-2
1.2.1 Functional Overview	1-2
1.2.2 Instance Maintenance	1-3
1.2.3 Multiple Party / Account Relationships	1-4
1.2.4 Configuration Support and Instance-to-Instance Relationships.....	1-5
1.2.5 Open Interface Mass Load and Mass Edit Capabilities.....	1-5
1.2.6 System Grouping of Item Instances.....	1-5
1.2.7 Extended Attributes.....	1-6
1.3 Integration Points and Dependencies for Oracle Install Base.....	1-6
1.3.1 Integration with the Oracle E-Business Suite.....	1-6
1.3.2 Inventory Receipt and Purchase Order Receipt	1-7
1.3.3 Inventory Transactions.....	1-8
1.3.4 Oracle Order Management Integration	1-10
1.3.5 WIP Integration	1-13
1.3.6 Support for Internal Sales Orders.....	1-16
1.3.7 Asset Integration	1-17
1.3.8 Project Integration.....	1-17
1.3.9 Use of Transactions Details.....	1-17

2 Implementation and Setup for New Users

2.1	Product Dependencies and Requirements.....	2-1
2.2	Setup Checklist for New Users.....	2-2
2.3	Related Setup Steps within Other Oracle Applications.....	2-5
2.3.1	Synchronize On-Hand Balance with Oracle Inventory	2-5
2.3.2	Set Up Inventory Serial Control at the Master Level	2-5
2.3.3	Set Up Oracle Install Base Items in the Item Master	2-6
2.3.4	Set Up Parties.....	2-6
2.3.5	Set Up Vendors.....	2-6
2.3.6	Set Up Employees.....	2-7
2.3.7	Set Up Party Accounts.....	2-7
2.3.8	Set Up Party Contacts.....	2-7
2.3.9	Verify the Setup of the Oracle Service Fulfillment Manager Event Queue.....	2-7
2.3.10	Set Up the Action Menu in Oracle Order Management	2-9
2.3.11	Set Up the Order Management Workflow for Non-Shippable Items.....	2-9
2.4	Related Setup Steps within Oracle Enterprise Install Base.....	2-13
2.4.1	Run the License Manager Program	2-13
2.4.2	Verify the Setup of Four Profile Options for Oracle Enterprise Install Base	2-13
2.4.3	Verify Location IDs in HZ_LOCATIONS.....	2-13
2.4.4	Verify Codes for Asset Update Statuses	2-14
2.5	Setup Steps within Oracle Install Base	2-14
2.5.1	Set Up Installation Parameters	2-16
2.5.2	Set Up Codes for Party-Account and Party-Contact Relationship Types.....	2-19
2.5.3	Verify Codes for Instance Relationship Types.....	2-20
2.5.4	Verify Extended Attribute-Level Codes	2-21
2.5.5	Set Up Extended Attribute Pools	2-22
2.5.6	Set Up Extended Attribute Classifications	2-22
2.5.7	Set Up Extended Attributes	2-23
2.5.8	Verify Accounting Classification Codes	2-23
2.5.9	Set Up Instance Type Codes	2-23
2.5.10	Verify Codes for Instance Location Sources.....	2-24
2.5.11	Verify Party Sources.....	2-25
2.5.12	Set Up Codes for Instance-Operating Unit Relationship Types.....	2-25
2.5.13	Set Up Version Labels.....	2-26
2.5.14	Set Up System Type Codes	2-26

2.5.15	Set Up Split Process Reasons	2-26
2.5.16	Verify Oracle Configurator Enabled Values	2-27
2.5.17	Verify Instance Class Values	2-27
2.5.18	Verify Values for the Resubmit Interface Process	2-28
2.5.19	Verify Values for CSI: Propagate Systems Changes	2-28
2.5.20	Set Up Regions for the Advanced Search Page	2-29
2.5.21	Set Up the Results of the Search Item Instances Page.....	2-30
2.5.22	Set Up Instance Statuses	2-33
2.5.23	Set Up Source Transaction Types	2-34
2.5.24	Set Up Transaction Subtypes.....	2-35
2.5.25	Set Up the Transaction Subtypes LOV from Non-Service Processes	2-38
2.5.26	Verify Transaction Status Codes	2-39
2.5.27	Verify Transaction Error Source Types.....	2-40
2.5.28	Create Business Users.....	2-40
2.5.29	Create Agent Users	2-41
2.5.30	Schedule the Expire End Dated Instances Program.....	2-41
2.5.31	Schedule the Install Base Open Interface Program	2-42
2.5.32	Schedule the Initiate Mass Edit Program	2-43
2.5.33	Schedule the Process Mass Edit Program.....	2-43
2.5.34	Schedule the Process Old Order Lines-Fulfillable Only Program	2-44
2.5.35	Schedule the Resubmit Interface Process	2-45
2.5.36	Schedule the Resubmit Waiting Transactions Program	2-46
2.5.37	Schedule the Install Base and Inventory Data Discrepancies Program	2-46
2.5.38	Schedule the Install Base Error Correction and Synchronization Program.....	2-47
2.5.39	Final Synchronize On-Hand Balance with Oracle Inventory	2-48

3 Implementation and Setup for Upgrade Users

3.1	Product Dependencies and Requirements	3-1
3.2	Setup Checklist for Upgrade Users.....	3-2

A Oracle Install Base System Profile Options and Debug Information

A.1	Oracle Install Base System Profile Options	A-1
A.2	Setting the Debug Option.....	A-3

B Seeded Data

B.1	Roles and Permissions	B-1
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Oracle Install Base Implementation Guide, Release 11i

Part No. B14132-01

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Preface

Welcome to the *Oracle Install Base Implementation Guide*, Release 11i.

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

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

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

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- The Oracle Applications graphical user interface.

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

See [Other Information Sources](#) for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to implement Oracle Install Base.

- Chapter 1 provides overviews of the application, its features, functions, and integration points with other applications.
- Chapter 2 provides details of the setup steps for new users to implement the product.
- Chapter 3 provides details of the setup steps for upgrade users to implement the product.
- Appendix A provides the configuration of the system profile options for the product.
- Appendix B provides seeded data such as roles and permissions.

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Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Install Base.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

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

- **PDF Documentation**- See the Online Documentation CD for current PDF documentation for your product with each release. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **Release Content Document** - See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on Oracle*MetaLink*.
- **About document** - Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on Oracle*MetaLink*.

Related Guides

Oracle Install Base shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Install Base.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Enterprise Install Base Implementation Guide

Refer to this guide to understand the implementation of a closely related product.

Oracle Telecommunications Service Ordering Process Guide

This guide provides guidance to implementers, administrative users, and end users of the Oracle Telecommunications Service Ordering (TSO) solution for telecommunication services and products. The purpose of this document is to provide the reader with an understanding of the solution, the overall user flow, the functionality, and the setup required for each Oracle application to enable the TSO solution.

Oracle Install Base User Guide

Refer to this guide to learn how to use the features of Oracle Install Base to work with item instances.

Oracle Enterprise Install Base User Guide

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

Oracle TeleService User Guide

This guide provides information about supporting applications for Oracle Service and Contracts applications.

Oracle Inventory User's Guide

This guide provides information about the proper classification of items so that they can flow properly into Oracle Install Base.

Oracle Order Management User's Guide

Refer to this guide to get a better understanding how products flow into Oracle Install Base.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

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

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alerts User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Manual

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Install Base and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Install Base working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

Your Feedback

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Overview of Oracle Install Base

This chapter covers the following topics:

- [Summary of Oracle Install Base](#)
- [Features of Oracle Install Base](#)
- [Integration Points and Dependencies for Oracle Install Base](#)

1.1 Summary of Oracle Install Base

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

Oracle Install Base is a centralized repository of information for an item instance and its tracking details including location, status, ownership, party 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 Install Base provides links to detailed information from contracts, service requests, repair orders initiated for an item instance, and counters associated with the item instance.

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

1.2 Features of Oracle Install Base

1.2.1 Functional Overview

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

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

Key features and functionality include the following:

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

- Capability of user-defined extended attributes

1.2.2 Instance Maintenance

Oracle Install Base provides for creation, updating, querying, and copying of instances through Oracle Install Base user interfaces and through integration with other applications. These include Oracle applications such as:

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

Asset creation and maintenance can be invoked using Oracle Enterprise Install Base.

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

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

1.2.2.1 Support for Inventory Transactions

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

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

1.2.2.2 Centralized Repository of Information

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

- Consolidated transactions history for an item instance
Oracle Install Base provides a single, centralized user interface to view and drill down from all transactions affecting tracking attributes for an item over the life of the item instance. Transaction details include, for example, transaction type, source application, transaction, line reference, and transaction date.
- Timestamp and version label history for an item instance
In the 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 what an item instance looked like at a given point in time.
- History of Oracle E-Business Suite transactions affecting Oracle Install Base
Oracle Install Base provides the ability to query transactions by date range, status, and transaction types across Oracle E-Business Suite applications. It pulls together information from multiple applications and presents it in a single, central user interface.

1.2.3 Multiple Party/Account Relationships

With Oracle Install Base you can relate an item instance to multiple entities called parties. The parties can be different party types. Thus an item instance may have been Sold To party A but is now Owned By party B. It may be Shipped To party C,

and so on. The entities may have type values such as Party, Vendor, Employee. For each party type, you can define relationship types such as Owner and Service Provider. Each party can have multiple accounts.

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

1.2.4 Configuration Support and Instance-to-Instance Relationships

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

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

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

1.2.5 Open Interface Mass Load and Mass Edit Capabilities

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

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

1.2.6 System Grouping of Item Instances

Oracle Install Base has the ability to group item instances under a construct called a system. For example, all copier machines on the fifth floor of a building or those belonging to a specific department can be grouped under a system. You can define, view, and invoke specific changes to item instances within the system, or grouping.

Additionally, you can build hierarchies of systems and link multiple systems in parent-child hierarchies or relationships.

1.2.7 Extended Attributes

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

1.3 Integration Points and Dependencies for Oracle Install Base

1.3.1 Integration with the Oracle E-Business Suite

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

- Counters and Notes (update capabilities)
- Direct updates from Oracle Field Service and Oracle Complex Maintenance Repair, and Overhaul
- View and reference accessibility from multiple applications such as Oracle Contracts, Oracle Field Service, Oracle Depot Repair, and Oracle Customer Support
- Oracle Trading Community Architecture for querying parties and accounts and building item instance to party relationships
- Oracle Inventory (receiving and other inventory transactions)
- Oracle Order Management (shipping, fulfillment, and RMA receipts). Includes integrations with the Oracle Telcommunications Service Ordering (TSO) functionality as well as the Oracle Order Management Partner Ordering process.
- Oracle Assets (Oracle Enterprise Install Base-specific updates through mass additions)
- Oracle Projects (Oracle Enterprise Install Base-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 Install 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 Install Base records, Oracle recommends that the party merge be done before the account merge. In addition, the internal party that is set up in the Oracle Install Base parameter cannot be used in the merge. For details, refer to [Section 2.5.1](#) in this document.
- When entering a quote, you can invoke the transaction detail to enter additional information for Oracle Install 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 Install Base.

1.3.2 Inventory Receipt and Purchase Order Receipt

If an item is set up as trackable in Oracle Install Base, then an inventory receipt such as miscellaneous receipt or PO receipt causes the creation or update of an Oracle Install 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 Install Base. Refer to *Oracle Enterprise Install Base Implementation Guide* and *Oracle Enterprise Install Base User Guide* for more information.

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. Only at order-issue time, when it gets a serial number, is an instance with the serial number created.

1.3.3 Inventory Transactions

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

Note: Oracle strongly recommends that you set up the Inventory Install 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 Enterprise Install Base documentation for more details.

Supported Oracle Inventory transactions are as follows:

- Internal Order Issue
- Project Contract Issue
- Return To Vendor
- Sales Order Issue
- Account Issue
- Move Order Issue
- Wip Component Issue
- Account Alias Issue
- Miscellaneous Issue
- Project Borrow
- Project Transfer
- Project Payback

- Move Order Transfer
- Internal Order Xfer
- Cycle Count Transfer
- Physical Inv Transfer
- Subinventory Transfer
- Backflush Transfer
- Int Order Direct Ship
- Direct Org Transfer
- Cycle Count Adjust
- Physical Inv Adjust
- Int Req Intr Rcpt
- Intransit Receipt
- Int Order Intr Ship
- Intransit Shipment
- Po Receipt
- Account Receipt
- Wip Component Return
- Account Alias Receipt
- Rma Receipt
- Miscellaneous Receipt
- Sales Order Pick
- Internal Order Pick
- Po Rcpt Adjust
- Int Req Rcpt Adjust
- Shipment Rcpt Adjust
- Wip Assy Completion
- Wip Assembly Return
- Wip Neg Comp Issue

- Wip Neg Comp Return
- Lot Split
- Lot Merge
- Lot Bonus
- Lot Translate
- Lot Update Quantity

The work-in-process inventory-sourced transactions are described in further detail in [Section 1.3.5, "WIP Integration"](#).

1.3.4 Oracle Order Management Integration

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

1.3.4.1 RMA Receipt

An RMA return receipt generates an inventory receipt material transaction in the Inventory application. If a serialized item never existed in Oracle Install 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 Install Base user interface and then reference it in the RMA. If the instance already exists in Oracle Install 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 Install Base.

Oracle Install 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 Install Base trackable.
- Instance Reference must be entered in the Transaction (Installation) Details window for Oracle Install Base update.

- RMA - Oracle Install Base interface workflow customizing is required.

Oracle Install 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 [Section 1.3.9](#) 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 [Section 2.5.24](#) for instructions on setting up transaction types.

1.3.4.2 Sales Order Shipment

For an Oracle Install 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 Oracle Order Management integration based creation of configurations for the following:

- 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 items must be Oracle Install Base trackable, and non-shippable items must be fulfilled in order to be represented in a configuration.

BOM Based Configurations

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

Oracle Install 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 Install 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 Install 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 Install 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 Install Base. Refer to [Section 1.3.9](#) 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 [Section 2.5.24](#) 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.

1.3.4.3 Sales Order Fulfillment

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

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

Configuration Creation at Sales Order Fulfillment

Oracle Install 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 Install 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 Install Base. Refer to [Section 1.3.9](#) for information on the use of transaction detail.

To use the transaction detail, the transaction types being used must have been previously set up. Refer to [Section 2.5.24](#) for instructions on setting up transaction types.

1.3.4.4 Ordering Process for End Customers and Partners

Oracle Install 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 Install Base from sales orders.

End-customer functionality provides for specification of Oracle Install Base ownership, current location, and installed location on a sales order. Following sales order fulfillment, these values are appropriately reflected in Oracle Install Base for an item instance. You can set up order management defaulting rules to specify Oracle Install Base ownership and the current and installed location in sales orders.

1.3.5 WIP Integration

Oracle Install 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. [Section 1.3.4](#) provides the list of supported transactions.

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

Assembly Completion and Allocation

The creation of Oracle Install 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 Install 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

1.3.6 Support for Internal Sales Orders

The internal sales order is one of the means for transferring items between internal organizations. Oracle Install 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 Install Base support for internal sales orders requires selection of the Oracle Inventory Oracle Install 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 Install 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 Install 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/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/no-control rules.

Inter-Organization Transfers:

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

1.3.7 Asset Integration

For information about asset integration, refer to *Oracle Enterprise Install Base Implementation Guide* and *Oracle Enterprise Install Base User Guide*.

1.3.8 Project Integration

For information about project integration, refer to *Oracle Enterprise Install Base Implementation Guide* and *Oracle Enterprise Install Base User Guide*.

1.3.9 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 Transaction Details Window" in *Oracle Install Base User Guide* and online help.

Implementation and Setup for New Users

This chapter provides implementation and setup information for new users of Oracle Install Base. Refer to [Chapter 3](#) if you have an earlier version of this application and are upgrading to this version.

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 Enterprise Install Base](#)
- [Setup Steps within Oracle Install Base](#)

2.1 Product Dependencies and Requirements

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

- Oracle Inventory
- Oracle Enterprise Install Base
- Oracle Service Fulfillment Manager
- Oracle Order Management
- Oracle Purchasing (Optional)
- Oracle Accounts Receivable
- Oracle Work in Process (Optional)
- Oracle Bills of Material

2.2 Setup Checklist for New Users

Table 2–1 provides a checklist of setup steps for new users of Oracle Install Base.

Table 2–1 Setup Checklist for New Users of Oracle Install Base

Step Number	Title	Required or Optional	Seeded?	Extensible?	Section Reference
1.	Synchronize On-Hand Balance with Oracle Inventory	Required	NA	NA	Section 2.3.1
2.	Set Up Inventory Serial Control at the Master Level	Required	NA	NA	Section 2.3.2
3.	Set Up Oracle Install Base Items in the Item Master	Required	NA	NA	Section 2.3.3
4.	Set Up Parties	Required	N	N	Section 2.3.4
5.	Set Up Vendors	Optional	N	N	Section 2.3.5
6.	Set Up Employees	Optional	N	N	Section 2.3.6
7.	Set Up Party Accounts	Required	N	N	Section 2.3.7
8.	Set Up Party Contacts	Required	N	N	Section 2.3.8
9.	Verify the Setup of the Oracle Service Fulfillment Manager Event Queue	Required	N	N	Section 2.3.9
10.	Set Up the Action Menu in Oracle Order Management	Required	N	N	Section 2.3.10
11.	Set Up the Order Management Workflow for Non-Shippable Items	Required	N	N	Section 2.3.11
12.	Run the License Manager Program	Required	N	N	Section 2.4.1
13.	Verify the Setup of Four Profile Options for Oracle Enterprise Install Base	Required	N	N	Section 2.4.2
14.	Verify Location IDs in HZ_ LOCATIONS	Required	Y	N	Section 2.4.3
15.	Verify Codes for Asset Update Statuses	Optional	Y	N	Section 2.4.4

Table 2–1 Setup Checklist for New Users of Oracle Install Base

Step Number	Title	Required or Optional	Seeded?	Extensible?	Section Reference
16.	Set Up Installation Parameters	Required	N	N	Section 2.5.1
17.	Set Up Codes for Party-Account and Party-Contact Relationship Types	Required	Y	Y	Section 2.5.2
18.	Verify Codes for Instance Relationship Types	Required	Y	N	Section 2.5.3
19.	Verify Extended Attribute-Level Codes	Required	Y	N	Section 2.5.4
20.	Set Up Extended Attribute Pools	Optional	N	Y	Section 2.5.5
21.	Set Up Extended Attribute Classifications	Optional	N	Y	Section 2.5.6
22.	Set Up Extended Attributes	Optional	N	Y	Section 2.5.7
23.	Verify Accounting Classification Codes	Required	Y	N	Section 2.5.8
24.	Set Up Instance Type Codes	Optional	N	Y	Section 2.5.9
25.	Verify Codes for Instance Location Sources	Required	Y	N	Section 2.5.10
26.	Verify Party Sources	Required	Y	N	Section 2.5.11
27.	Set Up Codes for Instance-Operating Unit Relationship Types	Required	Y	Y	Section 2.5.12
28.	Set Up Version Labels	Optional	Y	Y	Section 2.5.13
29.	Set Up System Type Codes	Required	N	Y	Section 2.5.14
30.	Set Up Split Process Reasons	Optional	N	Y	Section 2.5.15
31.	Verify Oracle Configurator Enabled Values	Required	Y	N	Section 2.5.16

Table 2–1 Setup Checklist for New Users of Oracle Install Base

Step Number	Title	Required or Optional	Seeded?	Extensible?	Section Reference
32.	Verify Instance Class Values	Required	Y	N	Section 2.5.17
33.	Verify Values for the Resubmit Interface Process	Required	Y	N	Section 2.5.18
34.	Verify Values for CSI: Propagate Systems Changes	Required	Y	N	Section 2.5.19
35.	Set Up Regions for the Advanced Search Page	Optional	Y	N	Section 2.5.20
36.	Set Up the Results of the Search Item Instances Page	Optional	Y	N	Section 2.5.21
37.	Set Up Instance Statuses	Required	Y	Y	Section 2.5.22
38.	Set Up Source Transaction Types	Required	Y	Y	Section 2.5.23
39.	Set Up Transaction Subtypes	Required	Y	Y	Section 2.5.24
40.	Set Up the Transaction Subtypes LOV from Non-Service Processes	Required	Y	N	Section 2.5.25
41.	Verify Transaction Status Codes	Required	Y	N	Section 2.5.26
42.	Verify Transaction Error Source Types	Required	Y	N	Section 2.5.27
43.	Create Business Users	Required	N	N	Section 2.5.28
44.	Create Agent Users	Required	N	N	Section 2.5.29
45.	Schedule the Expire End Dated Instances Program	Required	N	N	Section 2.5.30
46.	Schedule the Install Base Open Interface Program	Required	N	N	Section 2.5.31
47.	Schedule the Initiate Mass Edit Program	Required	N	N	Section 2.5.32
48.	Schedule the Process Mass Edit Program	Required	N	N	Section 2.5.33

Table 2–1 Setup Checklist for New Users of Oracle Install Base

Step Number	Title	Required or Optional	Seeded?	Extensible?	Section Reference
49.	Schedule the Process Old Order Lines-Fulfillable Only Program	Required	N	N	Section 2.5.34
50.	Schedule the Resubmit Interface Process	Required	N	N	Section 2.5.35
51.	Schedule the Resubmit Waiting Transactions Program	Required	N	N	Section 2.5.36
52.	Schedule the Install Base and Inventory Data Discrepancies Program	Required	N	N	Section 2.5.37
53.	Schedule the Install Base Error Correction and Synchronization Program	Required	N	N	Section 2.5.38
54.	Final Synchronize On-Hand Balance with Oracle Inventory	Required	NA	NA	Section 2.5.39

2.3 Related Setup Steps within Other Oracle Applications

2.3.1 Synchronize On-Hand Balance with Oracle Inventory

To maintain life-cycle tracking for all items that are to be tracked in Oracle Install Base, it maintains a mirror image of what is in Oracle Inventory. For new implementations of Oracle Install Base, all on-hand quantities of Oracle Install Base trackable items must be issued out of Oracle Inventory. Oracle suggests that you use the miscellaneous issue transaction in Inventory to do this step.

You receive these items back into Inventory at [Step 54](#) in the checklist. Refer to [Section 2.5.39](#) for related information.

2.3.2 Set Up Inventory Serial Control at the Master Level

Oracle Install Base requires that the serial control of Oracle Install Base trackable items is set up in the master organization for Oracle Install Base to support the continuous tracking through all organizations. For instructions on how to do this, consult the *Oracle Inventory User's Guide, Volumes 1 and 2*.

2.3.3 Set Up Oracle Install Base Items in the Item Master

All items that need to be tracked in Oracle Install Base and Enterprise Install Base are set up as Oracle Install Base trackable, whether they are tangible, inventory-transactable, shippable items such as a computer or intangible, non-inventory-transactable, non-shippable items such as a license. An item can be either Oracle Install 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 Install Base, the Install Base Tracking checkbox must be selected on the Service tabbed page of the Master Item window. The navigation is Inventory > Items > Master Items. Depending on the revision of the Oracle Inventory application, Install Base Tracking may not be on the Service tabbed page. In this case, select Network Logistics Trackable on the Inventory tabbed page of the Master Item window. 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 [Section 1.3.1, "Integration with the Oracle E-Business Suite"](#) for information about instance creation through integration.

For more information about how to set up items in Item Master, consult the *Oracle Inventory User's Guide, Volumes 1 and 2*.

2.3.4 Set Up Parties

The parties associated with item instances in Oracle Install Base need to be defined in HZ_PARTIES first.

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

2.3.5 Set Up Vendors

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

2.3.6 Set Up Employees

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

For more information about how to set up employees, consult Oracle Human Resources Applications implementation guides.

2.3.7 Set Up Party Accounts

The parties associated with item instances in Oracle Install 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 Install Base.

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

2.3.8 Set Up Party Contacts

Oracle Install 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 Install Base.

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

2.3.9 Verify the Setup of the Oracle Service Fulfillment Manager Event Queue

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

Oracle Install Base is dependent on the SFM Event Manager Queue Service. The setup steps for the SFM Event Manager Queue Service are listed below.

SFM Installation & SFM Post-Install Steps (One-Time)

It is critical that the Generic Service Management (GSM) post-install steps are done correctly. Otherwise, the SFM Event Manager Queue Service will not be activated. Contact Oracle Customer Support for a list of specific patch requirements.

Additional Manual Installation Step (One-Time)

SFM provides a Queue Console with which a DBA can see the number of events sitting in the Event Manager Queue Service. When SFM is installed in Shared Mode,

which is the case for Oracle Install Base, the Queue Console form must be manually compiled. This form is in \$XDP_TOP/forms/US/XDPADQCS.fmb.

Deactivate Services that Are Not Used (One-Time)

When a DBA starts the Internal Concurrent Manager (ICM), this automatically starts SFM Services that are registered with GSM. Because Oracle Install Base is using only the SFM Event Manager Queue Service, all other SFM Services can be deactivated. To do this:

Steps

1. Log into Oracle Applications with SFM System Administrator responsibility.
2. From the Navigator menu, select Concurrent > Administer Manager.
3. Deactivate all services that appear except the SFM Event Manager Queue Service.

Setup to ensure the Serializability of transactions processed in Oracle Install Base (One Time)

At any one time several transactions originating from Inventory and Order Management can be processed in Oracle Install 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 (XDP_DQ_INIT_NUM_THREADS=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.

2.3.10 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:
 - a. Seq: Choose the next sequence.
 - b. Function: Select Installed Base Transaction Details from the list of values.
 - c. Seq: Choose the next sequence.
 - d. Function: Select IB Maintain Systems from the list of values.
8. Save the record.

2.3.11 Set Up the Order Management Workflow for Non-Shippable Items

Oracle Install 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 Install Base tracking of tangible items.

Tracking intangible items, which are non-shippable and non-stockable, requires a separate procedure because Oracle Install 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 Install 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 Install Base tracking for non-shippable items:

1. Set up Oracle Workflow Builder
2. Set up Oracle Order Management transaction types

2.3.11.1 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.

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 Install Base as, for example, the seeded process Line Flow – Return for Credit Only.

2.3.11.2 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.

2.3.11.3 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 Install 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 Install Base.

2.4 Related Setup Steps within Oracle Enterprise Install Base

2.4.1 Run the License Manager Program

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

2.4.2 Verify the Setup of Four Profile Options for Oracle Enterprise Install Base

This is required only if you have not installed Oracle Enterprise Install Base. 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)

2.4.3 Verify Location IDs in HZ_LOCATIONS

[Table 2–2](#) lists the locations that must be defined in the HZ_LOCATIONS table before using them in Oracle Install Base:

Table 2–2 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.

2.4.4 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 [Table 2-3](#) are already seeded for CSI_ASSET_UPDATE_STATUS.

Table 2-3 Seeded Values for CSI_ASSET_UPDATE_STATUS

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

Refer to the *Oracle Enterprise Install Base Implementation Guide* for details.

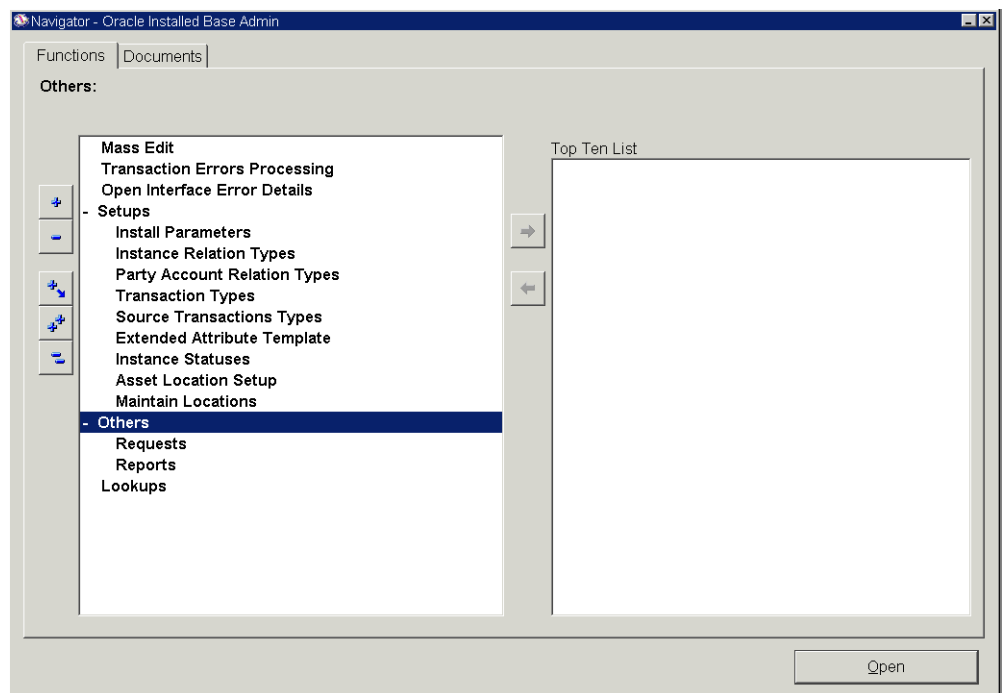
2.5 Setup Steps within Oracle Install Base

Most of these steps are performed through navigation to Oracle Install Base Setups and Lookups. You access these through the Oracle Installed Base Admin responsibility. Online help for the Install Base Lookups window provides information about lookups. The left pane of the Functions tabbed page of the Oracle Installed Base Admin window appears with the the following entries:

- Mass Edit
- Transaction Errors Processing
- Open Interface Error Details
- Setups
 - Install Parameters
 - Instance Relation Types
 - Party Account Relation Types

- Transaction Types
- Source Transaction Types
- Extended Attribute Template
- Instance Statuses
- Asset Location Setup
- Maintain Locations
- Others
 - Requests
 - Reports
- Lookups

Figure 2–1 Navigation for Oracle Install Base Setups



2.5.1 Set Up Installation Parameters

Oracle Install Base keeps a set of customer-specific installation parameters defined in a table at setup time. You use the Installed Parameters window to provide them. After you define them and select Freeze, 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.

Oracle Installed Base Admin responsibility: Setups > Install Parameters

The following list defines the fields in the Installed Parameters window.

- **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 Install Base customers, this party can be first set up as an internal party using Contact Center from the Oracle Customer Support application. This party does not require an account number. This HZ_PARTY can then be used in the Party Name field in the Install 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 Install Base process that creates the item instance assigns ownership of this new instance based on the Party Name in the Install Parameters window.

Caution: 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 Install 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 Install 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.

- Project Location (Address, City, State, and Zip): The location defined for the use of instances in Project.
- WIP Location (Address, City, State, and Zip): The location defined for use of instances in WIP.
- In-Transit Location (Address, City, State, and Zip): The location defined for use of instances in transit between organizations.
- PO Location (Address, City, State, and Zip): The location defined for use of instances in WIP outside processing.
- Category Set Name: The name of the category set to be used in the additional attributes setup.
- 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 Install Base processing of RMA receipts, order shipment, and miscellaneous receipts regardless of ownership.

For example:

In the case of an RMA receipt, Oracle Install Base processes the request even if the RMA customer is different from existing instance ownership. Oracle Install 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 Install Base instance, the ownership changes to Internal.

Caution: 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.

Caution: 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 Enterprise Install Base 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.

Figure 2–2 Installed Parameters Window

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

The instance party account relationship codes define the types of relationship that can be set up for parties, accounts, and contacts. The six seeded relationship types are defined in [Table 2–4](#):

Table 2–4 Seeded Relationship Types

Name	Party Selected?	Account Selected?	Contact Selected?
OWNER	Y	Y	N
BILL-TO	Y	Y	Y
SHIP-TO	Y	Y	Y

Table 2–4 Seeded Relationship Types

Name	Party Selected?	Account Selected?	Contact Selected?
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 checkboxes in the Instance Party Account Relationship Types window.

For more information about setting up these codes, consult the *Oracle TeleService Implementation Guide*.

2.5.3 Verify Codes for Instance Relationship Types

Oracle Install Base supports the eight types of instance-to-instance relationships shown in [Table 2–5](#).

Table 2–5 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 Install Base shipment/fulfillment integration, component-of configuration can be created through the BOM explosion, PTO model, and ATO model. Refer to [Section 1.3.4](#) for details on this integration.

From the WIP-Oracle Install Base integration, component-of configuration can be created through the WIP assembly completion into inventory. Refer to [Section 1.3.5](#) for details on this integration.

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

2.5.4 Verify Extended Attribute-Level Codes

Type: CSI Lookup

Lookup Type: CSI_IEA_LEVEL_CODE

Access Level: System (non-extensible)

Use [Table 2-6](#) 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 Install Base items. These are the extended attributes that are used in the Extended Attribute page of the application.

Table 2-6 Levels of Extended Attributes for Oracle Install Base Items

Lookup Code	Meaning	Description
GLOBAL	Global	Applicable to all item instances in Oracle Install 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.

Table 2–6 Levels of Extended Attributes for Oracle Install Base Items

Lookup Code	Meaning	Description
INSTANCE	Instance	Applicable only to the instance for which the extended attribute is defined.

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

2.5.5 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.

2.5.6 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 [Section 2.5.5](#)). 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.

2.5.7 Set Up Extended Attributes

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

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

- **Global:** Global Level Extended Attributes are applicable to all the item instances in Oracle Install 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 Install Base Extended Attributes window to define these attributes.

2.5.8 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 [Table 2-7](#) are already seeded for CSI_ACCOUNTING_CLASS_CODE.

Table 2-7 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

2.5.9 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.

2.5.10 Verify Codes for Instance Location Sources

Type: CSI Lookup

Lookup Type: CSI_INST_LOCATION_SOURCE_CODE

Access Level: System (non-extensible)

Verify that the following values that are shown in [Table 2–8](#) are already seeded for CSI_INST_LOCATION_SOURCE_CODE.

Table 2–8 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 Install Base.

2.5.11 Verify Party Sources

Type: CSI Lookup

Lookup Type: CSI_PARTY_SOURCE_TABLE

Access Level: System (non-extensible)

Verify that the following values that are shown in [Table 2-9](#) are already seeded for CSI_PARTY_SOURCE_TABLE.

Table 2-9 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 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 Install 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.

2.5.12 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 following values thta are shown in [Table 2-10](#) are already seeded for the CSI_IO_RELATIONSHIP_TYPE_CODE.

Table 2-10 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 Install 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.

2.5.13 Set Up Version Labels

Type: CSI Lookup

Lookup Type: CSI_INSTANCE_VERSION_LABELS

Access Level: Extensible

Verify that the following values that are shown in [Table 2–11](#) are already seeded for CSI_INSTANCE_VERSION_LABELS.

Table 2–11 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 first created.

2.5.14 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. This table is where user-defined system types can be set up for use in the 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.

2.5.15 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.

2.5.16 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 following values that are shown in [Table 2-12](#) are already seeded for CSI_CONFIG_ENABLED_VALUES.

Table 2-12 Codes for Oracle Configurator Enabled Values

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

2.5.17 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 that are shown in [Table 2–13](#) are seeded for CSI_ITEM_CLASS.

Table 2–13 Codes for Instance Classes

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

2.5.18 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 Install Base concurrent request Resubmit Interface process.

Confirm that the values that are shown in [Table 2–14](#) are seeded for CSI_RESUBMIT_OPTIONS.

Table 2–14 Codes for Resubmit Interface Options

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

2.5.19 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 that are shown in [Table 2–15](#) are seeded for `CSI_SYSTEM_WINDOW_DISPLAY`.

Table 2–15 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.

2.5.20 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`.
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.

Table 2–16 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
00400	CSI_CURRENT_LOCATION	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

2.5.21 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.

Table 2–17 Codes for 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
0110	CSI_RETURN_BY_DATE	110
0120	CSI_ACTUAL_RETURN_DATE	120
0125	CSI_SHIPPED_DATE	125
0130	CSI_USAGE	130

Table 2–17 Codes for the Search Products Page

Lookup Code	Meaning	Description
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
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

2.5.22 Set Up Instance Statuses

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

Table 2–18 CSI Instance 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
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

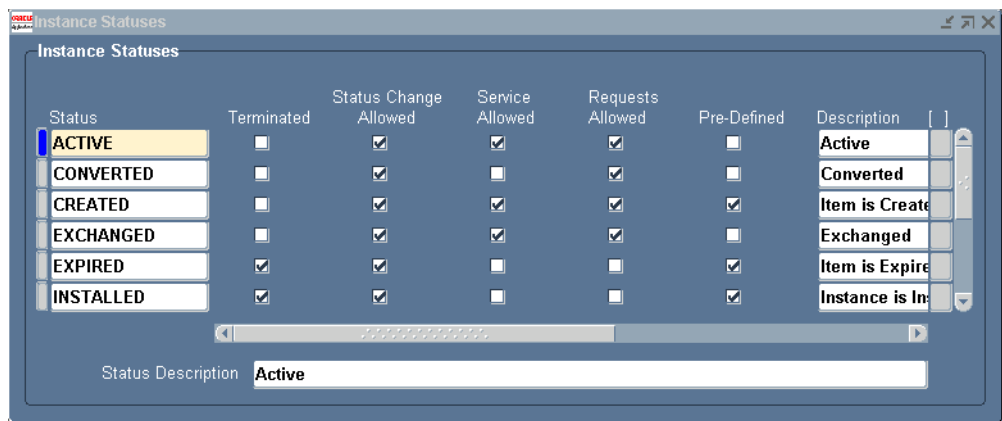
There are 16 seeded statuses.

The meaning of the checkboxes is as follows:

- Terminated: Sets the instance to be terminated.
- 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 the service contract will be called to terminate the contract
- Requests Allowed: Service request can be created for an instance with this status.
- Pre-Defined: Seeded
- Updatable: The checkboxes on this status can be updated

Figure 2–3 Instance Statuses Window



2.5.23 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 Install Base. Values can be seeded or user-defined. See [Section 2.5.24](#) 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 Install Base.

Transaction Type: The user-defined name of the kind of transaction that integrates with Oracle Install 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.

Figure 2–4 Source Transaction Types Window

Name	Description	Default	Update IB	Reference Req'd	Change Owner	Change Owner To
Sell	Sell	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	External
Autocreate System	AutoCreate Systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	External
New		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	External
Product Upgrade		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Revision Update		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Replace		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	External
Ship Upgraded - Item	Ship Upgraded Item - Rev	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

2.5.24 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 Install 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.

Figure 2–5 Transaction Subtypes Window

Transaction Subtypes

Service Type Name Description Seeded Freeze

Source Info

Reference Req'd
Change Owner
Change Owner To
Status
Return Req'd
Revision Req'd

Non Source Info

Reference Req'd
Change Owner
Change Owner To
Status
Return Req'd

Parent Info

Reference Req'd
Status
Revision Req'd

Source Transaction Types

Application Name	Transaction Name	Transaction Type	Description	Source Object	In Out	Default	Update IB
Oracle Order Mar	Order Managem	OM_SHIPMENT	Order Managemen		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Field Service	Field Service Rep	FIELD_SERVICE	Field Service Rep		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Oracle Order Cap	Order Capture Qu	ORDER_CAPTUR	Order Capture Quo		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Oracle Project Co	Oracle Project Co	PROJECT_CONT	Oracle Project Con		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Oracle Contracts	OKS Subscription	OKS_SUBSCRIP	Subscription Instan		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Window Regions

Transaction Subtypes Region

This region is used to define the name of the transaction subtype. The name can come from two sources, depending whether the Service Type checkbox is selected or not:

- If Service Type is selected, then the LOV comes from the Service Transaction Billing Types setup.
- If Service Type is not selected, then the LOV comes from the Oracle Install Base Transaction Type code setup. Refer to the section on "Transaction Subtype from the Non-Service process."

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 be the part being sold on the sales order line.

Reference Required: Specifies whether an Oracle Install 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 Install Base item instance number is always required for the Oracle Install 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 Install 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 Req'd, Status, and Revision Req'd 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 checkboxes.

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 Install Base or not. For example, some subtypes set up for the Oracle Field Service application updates Oracle Install Base only from Oracle Field Service.

2.5.25 Set Up the Transaction Subtypes LOV from Non-Service Processes

Type: CSI Lookup

Lookup Type: `CSI_IB_TXN_TYPE_CODE`

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

This setup is found in the Oracle Install 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 [Table 2–19](#) to confirm the seeded values for CSI_IB_TXN_TYPE_CODE.

Table 2–19 Codes 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

2.5.26 Verify Transaction Status Codes

Type: CSI Lookup

Lookup Type: CSI_TRANSACTION_STATUS_CODE

Access Level: System

Values are seeded for this code.

Use [Table 2–20](#) to confirm the seeded values for CSI_IB_TXN_TYPE_CODE.

Table 2–20 Transaction Status Codes

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

2.5.27 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 [Table 2–21](#) to confirm the seeded values for CSI_TXN_ERRORS_SOURCE_TYPES.

Table 2–21 Transaction Status Codes

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 Enterprise Install Base during transaction processing.
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.

2.5.28 Create Business Users

Create business users as needed for Oracle Install Base. To do so, you must create business users and assign them the responsibility of an Oracle Install 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 Install Base supports, see [Section 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 Install Base window shows only the active accounts that are associated with a user.

2.5.29 Create Agent Users

Create agent users as needed for Oracle Install Base. To do so, you must create internal users and assign them the predefined CSI_NORMAL_USER role and the responsibility of an Oracle Install Base user. A role is a combination of permissions, which enable specific access and update privileges. For descriptions of the roles and permissions that Oracle Install Base supports, see [Section 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.

2.5.30 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. To schedule the program:

Steps

1. Login as Oracle Installed Base Admin in the forms mode.
The Navigator window appears.
2. Chose 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.

2.5.31 Schedule the Install Base Open Interface Program

This program imports significant volumes of data into Oracle Install Base application tables through its mass load feature. Through its incremental load feature, it synchronizes Oracle Install Base with subsystems by importing item instances from different feeder systems on a frequent, on-going 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. To schedule the program:

Steps

1. Login as Oracle Installed Base Admin in the forms mode.
The Navigator window appears.
2. Chose 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.

2.5.32 Schedule the Initiate Mass Edit Program

This program polls the submitted mass edit sessions and calls the Process Mass Edit program to process eligible sessions. In order to process mass edit transactions, run the Initiate Mass Edit concurrent program or schedule it to run at a regular intervals. Oracle recommends that you schedule it to run at least once a day. To schedule the program:

Steps

1. Login as Oracle Installed Base Admin in the forms mode.
The Navigator window appears.
2. Chose 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 Initiate Mass Edit.
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.

2.5.33 Schedule the Process Mass Edit Program

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

Steps

1. Login as Oracle Installed Base Admin in the forms mode.
The Navigator window appears.
2. Chose 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 Mass Edit Transaction.
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.

2.5.34 Schedule the Process Old Order Lines-Fulfillable Only Program

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

Steps

1. Login as Oracle Installed Base Admin in the forms mode.
The Navigator window appears.
2. Chose 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.

2.5.35 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 Installed Base Admin in the forms mode.
The Navigator window appears.
2. Chose 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.

2.5.36 Schedule the Resubmit Waiting Transactions Program

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

Steps

1. Login as Oracle Installed Base Admin in the forms mode.
The Navigator window appears.
2. Chose 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.

2.5.37 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 Install 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 Installed Base Admin in the forms mode.
The Navigator window appears.
2. Chose 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.

2.5.38 Schedule the Install Base Error Correction and Synchronization Program

The 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 program can be scheduled to run at a regular interval. To schedule the program:

Steps

1. Login as Oracle Installed Base Admin in the forms mode.
The Navigator window appears.
2. Chose 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 Error Correction and Synchronization Program.
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.

2.5.39 Final Synchronize On-Hand Balance with Oracle Inventory

To maintain life-cycle tracking for all items that are to be tracked in Oracle Install Base, it maintains a mirror image of what is in Inventory. For new implementations of Oracle Install Base, all on-hand quantities of the Oracle Install Base trackable items were issued out of Oracle Inventory in [Step 1](#) of the 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.

Implementation and Setup for Upgrade Users

This chapter provides implementation and setup information for users who have an earlier version of Oracle Install 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.

This chapter covers the following topics:

- [Product Dependencies and Requirements](#)
- [Setup Checklist for Upgrade Users](#)

3.1 Product Dependencies and Requirements

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

- Oracle Inventory
- Oracle Enterprise Install Base
- Oracle Service Fulfillment Manager
- Oracle Order Management
- Oracle Purchasing (Optional)
- Oracle Accounts Receivable
- Oracle Work in Process (Optional)
- Oracle Bills of Material

3.2 Setup Checklist for Upgrade Users

Table 3–1 provides a checklist of setup steps for upgrade users of Oracle Install Base. The entries for section reference in the table direct you to [Chapter 2](#) for detailed step descriptions.

Table 3–1 Setup Checklist for Upgrade Users of Oracle Install Base

Step Number	Title	Required or Optional	Seeded?	Extensible?	Section Reference
1.	Set Up Inventory Serial Control at the Master Level	Required	NA	NA	Section 2.3.2
2.	Set Up Oracle Install Base Items in the Item Master	Required	NA	NA	Section 2.3.3
3.	Set Up Vendors	Optional	N	N	Section 2.3.5
4.	Set Up Employees	Optional	N	N	Section 2.3.6
5.	Verify the Setup of the Oracle Service Fulfillment Manager Event Queue	Required	N	N	Section 2.3.9
6.	Set Up the Action Menu in Oracle Order Management	Required	N	N	Section 2.3.10
7.	Set Up the Order Management Workflow for Non-Shippable Items	Required	N	N	Section 2.3.11
8.	Run the License Manager Program	Required	N	N	Section 2.4.1
9.	Verify the Setup of Four Profile Options for Oracle Enterprise Install Base	Required	N	N	Section 2.4.2
10.	Verify Location IDs in HZ_ LOCATIONS	Required	Y	N	Section 2.4.3
11.	Verify Codes for Asset Update Statuses	Optional	Y	N	Section 2.4.4
12.	Set Up Codes for Party-Account and Party-Contact Relationship Types	Required	Y	Y	Section 2.5.2

Table 3–1 Setup Checklist for Upgrade Users of Oracle Install Base

Step Number	Title	Required or Optional	Seeded?	Extensible?	Section Reference
13.	Verify Codes for Instance Relationship Types	Required	Y	N	Section 2.5.3
14.	Verify Extended Attribute-Level Codes	Required	Y	N	Section 2.5.4
15.	Set Up Extended Attribute Pools	Optional	N	Y	Section 2.5.5
16.	Set Up Extended Attribute Classifications	Optional	N	Y	Section 2.5.6
17.	Set Up Extended Attributes	Optional	N	Y	Section 2.5.7
18.	Verify Accounting Classification Codes	Required	Y	N	Section 2.5.8
19.	Verify Codes for Instance Location Sources	Required	Y	N	Section 2.5.10
20.	Verify Party Sources	Required	Y	N	Section 2.5.11
21.	Set Up Codes for Instance-Operating Unit Relationship Types	Required	Y	Y	Section 2.5.12
22.	Set Up the Transaction Subtypes LOV from Non-Service Processes	Required	Y	N	Section 2.5.25
23.	Verify Transaction Error Source Types	Required	Y	N	Section 2.5.27
24.	Verify Oracle Configurator Enabled Values	Required	Y	N	Section 2.5.16
25.	Verify Instance Class Values	Required	Y	N	Section 2.5.17
26.	Verify Values for the Resubmit Interface Process	Required	Y	N	Section 2.5.18
27.	Verify Values for CSI: Propagate Systems Changes	Required	Y	N	Section 2.5.19
28.	Set Up Regions for the Advanced Search Page	Optional	Y	N	Section 2.5.20

Table 3–1 Setup Checklist for Upgrade Users of Oracle Install Base

Step Number	Title	Required or Optional	Seeded?	Extensible?	Section Reference
29.	Set Up the Results of the Search Item Instances Page	Optional	Y	N	Section 2.5.21
30.	Create Business Users	Required	N	N	Section 2.5.28
31.	Create Agent Users	Required	N	N	Section 2.5.29
32.	Schedule the Expire End Dated Instances Program	Required	N	N	Section 2.5.30
33.	Schedule the Install Base Open Interface Program	Required	N	N	Section 2.5.31
34.	Schedule the Initiate Mass Edit Program	Required	N	N	Section 2.5.32
35.	Schedule the Process Mass Edit Program	Required	N	N	Section 2.5.33
36.	Schedule the Process Old Order Lines-Fulfillable Only Program	Required	N	N	Section 2.5.34
37.	Schedule the Resubmit Interface Process	Required	N	N	Section 2.5.35
38.	Schedule the Resubmit Waiting Transactions Program	Required	N	N	Section 2.5.36
39.	Schedule the Install Base and Inventory Data Discrepancies Program	Required	N	N	Section 2.5.37
40.	Schedule the Install Base Error Correction and Synchronization Program	Required	N	N	Section 2.5.38

Oracle Install Base System Profile Options and Debug Information

A.1 Oracle Install Base System Profile Options

[Table A-1](#) describes the profile options for Oracle Install Base. These profile options are to be set at the site level.

Table A-1 Profile Options for Oracle Install Base

Profile Option Name	Comments
CSI: Allow Install Parameter Update	<p><i>Use this profile option with great caution.</i> 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 <i>one-time</i> update to install parameters. Then it is set to N.)</p> <p>For more information, refer to the discussion of the Override Ownership checkbox in Section 2.5.1, "Set Up Installation Parameters" on page 2-16.</p>
CSI: Auto-Generate System Name	Auto-generate System Number at time of system creation (Y or N).
CSI: Auto-split Instances During Instantiation	Auto split instances with multiple quantity to 1 per instance at time of instance creation (Y or N).
CSI: BOM Explosion Level	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.
CSI: Cascade System Termination	Cascade system termination to instances (Y or N).

Table A-1 Profile Options for Oracle Install Base

Profile Option Name	Comments
CSI: Configurator Enabled	Default = Network Models Only. Used for integration with the TSO solution and the Oracle Configurator product.
CSI: Contracts Enabled	Enable Oracle Install Base integration with Oracle Service Contracts (Y or N).
CSI: Counters Enabled	Enable Oracle Install Base integration with Counters (Y or N).
CSI: Debug Level	For Debug, set at 9 or 10 for Debug to start.
CSI: Default Install Date with Ship or Fulfillment Date	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	Default Instance Status at time of instance creation. Pick one status from the LOV.
CSI: Default Version Label	Default version label at time of instance creation. Pick one from the LOV.
CSI: Display HTML UI	Option to use Oracle Install Base HTML for display (Internal). Used by other CRM applications to use the Oracle Install Base HTML UI (Y or N).
CSI: Enable Contracts For Open Interface	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	For Debug (Y or N). Set to Y to start Debug.
CSI: Explode BOM	Enable BOM explosion for top assembly with Oracle Install Base trackable components at time of shipment/fulfillment (Y or N).
CSI: Filter Display of all Contracts	Default = N. If set to Y, the application displays only active contracts.
CSI: Forms to SSWA Default Responsibility	Default user for applications to launch HTML from forms. Default Installed Base User or from the LOV.
CSI: Instance Termination Status	Default Termination Status. Pick one from the LOV.
CSI: Log file Name	The name of the log file for Debug.
CSI: Log File Path	For Debug ('utl-file-dir' parameter in init.ora).

Table A-1 Profile Options for Oracle Install Base

Profile Option Name	Comments
CSI: OE Line Processing Delay	Delay between OE line processing. Time between order line processing to allow for Oracle Install Base update completion to avoid record locking. Recommended delay: 60 seconds.
CSI: Open Interface Commit Record Limit	Used to commit Open Interface transactions to the data base. Default = 1000.
CSI: Restrict LOV's on Site Usage.	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.
CSI: Show Expired Instances	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 Install Base UI.
CSI: Stop At Debug Errors	Set to Y to start debug (Y or N).
CSI: System Name Update Allowed	System name update allowed after system name creation (Y or N).
CSI: UI Default Selection of View Details Dropdown	Defines the default link populated in the 'speed menu' for summary results displayed in the Search Products page.
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, this inventory organization is used to validate whether an item is trackable in Oracle Install Base and to derive other item parameters such as serialization when you create new item instances using Oracle Install Base. Oracle strongly recommends that you set this to a master inventory organization.

A.2 Setting the Debug Option

Oracle Install 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 turn the debug option on, 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.

Seeded Data

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

B.1 Roles and Permissions

Oracle Install Base ships with four pre-defined roles, which [Table B-1](#) describes.

Table B-1 Roles Supported by Oracle Install 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 Install Base data.
CSI_NORMAL_USER	Normal user	For internal agent users. Has update permissions to change Oracle Install Base data.
CSI_READ_ONLY_USER	Read-only user	Applies to users who only need read-only access to Oracle Install Base data.

A role is a combination of permissions, which [Table B-2](#) describes.

Table B-2 Permissions Supported by Oracle Install Base

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

Table B-2 Permissions Supported by Oracle Install Base

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
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
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

Table B-2 Permissions Supported by Oracle Install Base

Name	Description	Read Only User	Normal User	End Customer User	Customer User
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
CSI_OP_UNIT_RESTRICTION	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
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

Table B-2 Permissions Supported by Oracle Install Base

Name	Description	Read Only User	Normal User	End Customer User	Customer User
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
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
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

Table B-2 Permissions Supported by Oracle Install Base

Name	Description	Read Only User	Normal User	End Customer User	Customer User
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
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
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 Install Base User to view all types of contacts	Y	Y	N	N

Table B-2 Permissions Supported by Oracle Install Base

Name	Description	Read Only User	Normal User	End Customer User	Customer User
CSI_SHOW_ALL_LOCATIONS	Allows the Oracle Install 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
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 Install Base User to view only the external contacts	Y	N	Y	Y
CSI_SHOW_EXT_LOCATIONS	Restricts the Oracle Install 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
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

Table B-2 Permissions Supported by Oracle Install Base

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
CSI_TRANSFER_OWNER_VIEW	View permission for Instance Owner page	Y	Y	N	N