

# Oracle<sup>®</sup> Field Service/Laptop

Concepts and Procedures

Release 11*i*

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**Part No. A83633-01**

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

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# Preface

Welcome to the Oracle Customer Relationship Management, Release 11i, suite of applications.

This Concepts and Procedures provides information and instructions to help you work effectively with Oracle Field Service/Laptop.

This preface explains how Concepts and Procedures is organized and introduces other sources of information that can help you.

## Intended Audience

This guide is aimed at the following users:

- Field Service Representatives
- Field Service Dispatchers and Field Service Planners
- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility

## Structure

This manual contains the following chapters:

"Oracle Field Service/Laptop" provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

"The Dashboard" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"The Agenda" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"The Message System" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"Tasks" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"Service Requests" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"Parts" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"Field Service Report" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"Service Request Explorer" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"Views" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"Counters" explanation of key concepts, features, and functions and provides process-oriented, task-based procedures for using the application to perform essential business tasks.

## **Related Documents.**

For more information, see the following manuals:

- *Oracle Field Service Concepts and Procedures*
- *Oracle Field Service/Laptop and Palm™ Devices Installation Guide*

## Conventions

The following conventions are also used in this manual:

Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
...	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
<b>boldface text</b>	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.



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# Oracle Field Service/Laptop

## About Mobile Field Service

Oracle Field Service/Laptop and Oracle Field Service/Palm™ Devices are remote applications that work with the Oracle Field Service application. These remote applications let you access your field service information while on the road. You can work independently from the corporate network and then synchronize your changes back to the central database, either over a phone line, a LAN/WAN, or by wireless connection.

## The Oracle Field Service/Laptop Device

Oracle Field Service/Laptop provides all the data you need to perform your service tasks while away from your office. To be effective, the data residing on the Laptop device needs to be regularly updated with Oracle Field Service and data that you have entered into your Laptop device needs to be transferred to Oracle Field Service. This process of transferring data to and from your Laptop device is known as synchronization.

## The CRM Gateway for Mobile Devices

The CRM Gateway for Mobile Devices consists of a mobile client and a central application. It provides data transport between the Oracle CRM enterprise database and the Oracle mobile client database. The CRM Gateway for Mobile Devices sends correct data to each service representative. It only transports changed, new, or missing data because it knows what data resides on each device. The CRM Gateway for Mobile Devices also acts as the communication server. Based upon transaction priority it decides if information needs to be sent wireless or if it can wait until manual synchronization. This is an economic way to manage wireless communication.

## Oracle Field Service/Laptop Application Overview

Oracle Field Service/Laptop is a standalone, wireless connectivity solution that provides service representatives with real time access to service information. It provides consistent service by supporting on the road service representatives with precise, up-to-date information about the service schedule assigned to them by the dispatcher. Let's review in more detail:

- [Oracle Field Service/Laptop Features](#)
- [Oracle Field Service/Laptop Screen Flow](#)
- [Basic Navigation for the User Interface](#)

### Oracle Field Service/Laptop Features

The information that is sent to the service representatives by the dispatcher needs to be updated or read.

Service representatives receive the following dispatched information:

- Service request number, severity, type, and status
- Tasks assigned to the service request, task status, priority, and definition
- Resolution date and time expectation
- Parts information
- Problem and solution notes
- Details on customer and installed base
- Counter readings

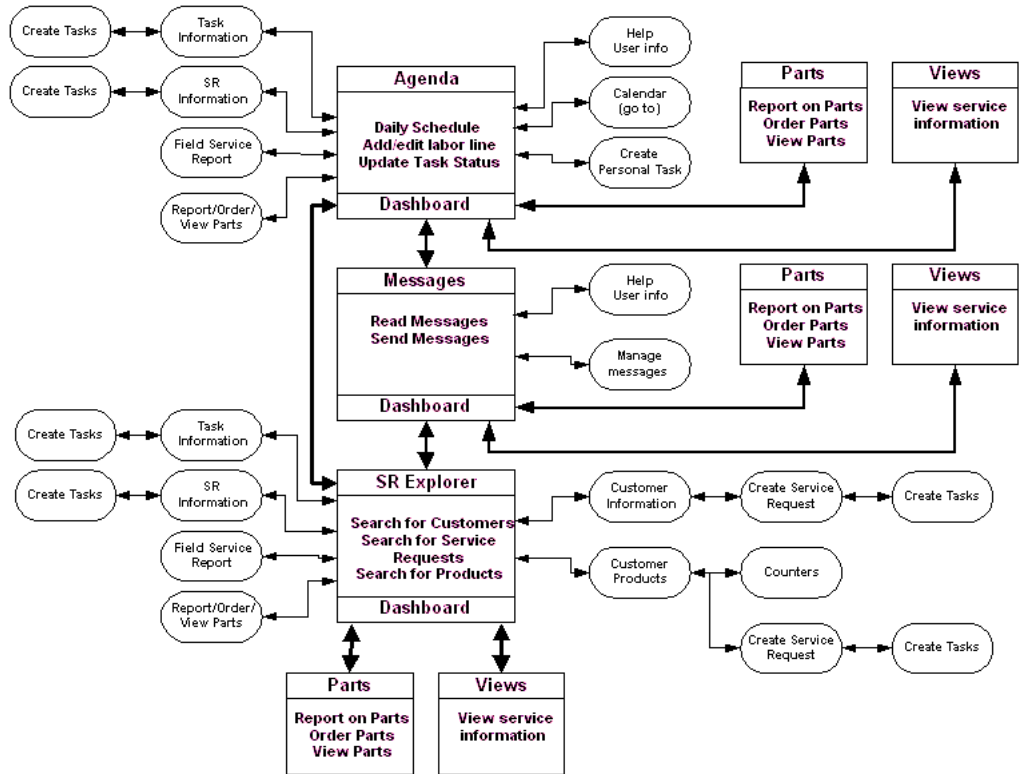
The service representative reports on the following:

- Service request severity and type
- Task status, task type, and task definition
- Labor, parts, and expenses (by means of field service report)
- Counter readings
- Problem and solution (by means of notes)

## Oracle Field Service/Laptop Screen Flow

The screen flow shows the relation between the different screens in the application and where and how to access the information you need.

**Figure 0–1 Oracle Field Service/Laptop Screen Flow**



## Basic Navigation for the User Interface

Within the OMFS Laptop application there are some basic navigation elements. Navigate through the application using the buttons on the dashboard. By clicking a button from the dashboard you select what screen you are opening and a corresponding toolbar appears. The toolbar is shown on the top of the screen. There are elements on the toolbar that apply for all the screens and there are elements that are screen specific. The following toolbar buttons exist:

- **Send Message** opens the New Message window.
- **Print** prints the active screen.
- **Information** activates the option to retrieve information. Double click on a specific service request, task, customer, or customer product.
- **Field Service Report** activates the option to report on a task or service request. Double click on a specific service request or task.
- **Parts** activates the option to open the parts window for a specific task. Double click on the specific task.
- **Help** opens the Oracle Field Service/Laptop Help system.
- **Personal Task** opens the Add Task screen to add a personal task to your Agenda.
- **Calendar** opens the Agenda for the past or future. Double click on the date of your choice.
- **Increase Font Size** increases the font size every time you click the button.
- **Decrease Font Size** decreases the font size every time you click the button.
- **Folder List** displays a folder list on the left-hand side of the Message screen.
- **Delete** deletes the message.
- **Inbox** shows the received messages.
- **Outbox** shows the send messages.

## Dialing in/Synchronizing the Oracle Field Service/Laptop

You must synchronize your OFS Laptop on a daily base with Oracle Field Service to make your updated information available to others and to keep your OFS Laptop up to date. Use this procedure to dial in with your OFS Laptop to synchronize service data with Oracle Field Service.

### Prerequisites

None

### Steps

1. Click the **Start** button from the task bar.
2. Select **Programs**.

3. Select **OMFS Laptop**. The login dialog box appears.
4. Enter your UserId and Password. Click **OK** when you have finished.



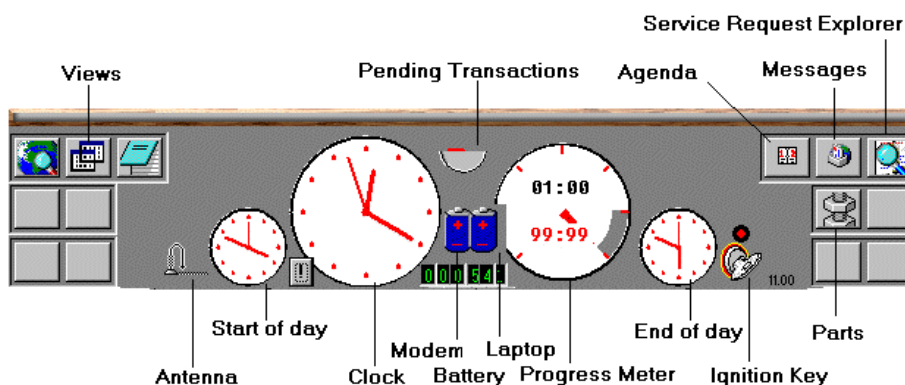
# The Dashboard

## Dashboard Features

Use the dashboard to navigate through the OMFS Laptop windows and monitor progress on your working day. The dashboard is displayed on the lower half of your screen.

There are buttons on the right and left side of the dashboard. The buttons on the left can be configured as desired, ask your administrator for more information. The buttons on the right side are fixed application buttons to navigate through the screens.

**Figure 0-2 The Oracle Field Service/Laptop Dashboard**



Explanation on the dashboard icons:

Item	Description
Antenna	Up when mobile communication is possible. Down when it is not.
Start of day	Displays start of day when ignition key is clicked.
!	Displays a communication box on the left to show received tasks send by the dispatcher. Click to close the box.

Item	Description
Clock	Displays the time.
Modem Battery	Indicates power level of modem battery.
Laptop Battery	Indicates power level of laptop battery.
Mileage Meter	Shows the last registered car mileage of the service representatives vehicle.
Progress Meter	Indicates progress on current task or time elapsed in day.
End of day	Displays end of day time when ignition key is clicked to end the work day.
Ignition Key	Clicked to start the work day and clicked again to end it. Light will turn on when clicked to start the work day.
Parts	Opens the Parts screen.
Service Request Explorer	Opens the Service Request Explorer screen.
Messages	Opens the Messages screen.
Agenda	Opens the Agenda screen.
Pending Transactions	Displays number of unsent Tasks. Note : Do not stop Laptop device while pending transactions exist.
Views	Opens the Views screen.

The following tasks can be performed from the dashboard:

- [Recording your working hours](#)

## Recording your working hours

In Oracle Field Service/Laptop you can easily keep track of your working hours. Working hours display in your Agenda and on the Start of Day and End of Day clocks. This is also registered in Oracle Field Service.

### Prerequisites

None.

## Steps

1. From the dashboard, double-click the **Ignition Key** to start recording your working hours. The ignition key turns to the right.

A non-service request related entry appears in your Agenda with the start time.

2. Double click the **Ignition Key** again to stop recording your working hours. The ignition key returns to a vertical position.

You will see that the end time in the Agenda entry is filled out.

## Guidelines

If necessary record your working hours at intervals during the day.



# The Agenda

## Agenda Features

The Agenda displays the service requests and tasks assigned to you by the dispatcher. These service requests and tasks are sent to you electronically and are presented in the Agenda in a daily view with a sequential time order. You can easily start recording labor time for a task, create multiple labor lines for a task or change task status. All changes will be applied to the agenda immediately. The Agenda presents the following information:

- Your day's schedule
- Service requests with severity in color
- Task(s) related to the service request
- Task Start and End time
- Task status
- Actual Start and End Time with related Labor lines
- Escalations like passing the Task Start time, in color

Access the following information from the Agenda:

- Service request or task information
- Task status for update
- Start or create a new labor
- Parts information for a specific task
- Field Service Report for a service request or a specific task
- Create a task
- View future or past agendas

The Agenda is divided into columns that you can customize to meet your own needs. Drag the right border of a column heading to the right or left. Access information screens by double-clicking parts of the Agenda.

Escalations show up by a change of color of the information presented in the Agenda. The color is turned to red and is a warning something is not right.

The following tasks can be performed from the Agenda:

- [Viewing Future or Past Agendas](#)
- [Updating Task Status](#)
- [Adding Labor](#)
- [Editing Labor](#)

## Viewing Future or Past Agendas

You can look at the future or past agendas.

### Prerequisites

None.

### Steps

1. Click the **Agenda** button on the dashboard. The Agenda window appears.
2. Click the **Calendar** button from the toolbar. The Select Date screen appears.
3. Double click on the date of your choice. The Agenda screen for the selected date Appears.

### Guidelines

Before entering another personal task you will need to close the previous one by entering the Actual End time.

## Updating Task Status

When you have completed your task the task status needs to be updated. This information will be used to update and monitor the service schedule.

### Prerequisites

None

### Steps

1. Click the **Agenda** button on the dashboard. The Agenda window appears.
2. To update the status of the task double-click the Task Status column for the specific task. The Choose Task Status screen opens.

3. Choose a task status from the drop-down list and click the check mark to save the settings.

## Adding Labor

A task might have several labor items that need to be performed. Report on labor time when performing a task.

There are two ways to report on labor time: form the Field Service Report screen or from the Agenda screen. To report on labor time from the Field Service Report screen see [Adding or Editing Labor](#).

### Prerequisites

None.

### Steps

1. Click the **Agenda** button on the dashboard.
2. Create labor lines for a task by double-clicking the corresponding field from the Actual Start column. The Choose Labor Item screen opens.
3. Choose a labor item from the drop-down list and click the check mark to save the settings.

The service request and the task line will change color and an entry is made in the Actual Start column and labor column.

4. Enter the end time for the labor by double-clicking the corresponding field from the Actual End column. The Rounded off time screen appears.
5. Select a date and time for the labor to end and click the check mark to save the settings.

## Editing Labor

To change the labor item or time, you can edit the labor.

### Prerequisites

None.

### Steps

1. Click the **Agenda** button on the dashboard.

2. Edit a labor line for a task by double-clicking the corresponding field from the Labor column. The Choose Labor Item screen opens.
3. Choose a different labor item from the drop-down list. Enter the end time for the labor by double-clicking the corresponding field from the Actual End column. The Rounded off time screen appears. You can select a date and time for the labor to end.
4. Click the check mark to save the settings.

# The Message System

## Messages Features

In the Oracle Field Service/Laptop there is a message system. Messages is used to send messages to the dispatcher or other service representatives and receive messages from them.

The system provides:

- Sending a new message from anywhere within the application
- Viewing incoming and sent messages.

The following tasks can be performed regarding messages:

- [Managing your Messages](#)
- [Sending Messages](#)

## Managing your Messages

You can quickly send a message from anywhere within the application or manage your messages more extensively.

### Prerequisites

None.

### Steps

1. Click the **Messages** button on the dashboard. The Messages screen opens.
2. From the toolbar click the **Show/Hide Folder List** to show or hide the folder list on the left side of the screen.
3. From the toolbar click the **Inbox** to view an read messages.
4. From the toolbar click the **Outbox** to view and read messages.

## Sending Messages

You can quickly send a message from anywhere within the application.

### **Prerequisites**

None.

### **Steps**

1. From the toolbar select the **Send New Message** button. The new mail message window opens.
2. To track the send mail click the **Options** button.
3. To use an existing mailing address click the **Address** button.
4. When you have finished click **Send**.

# Tasks

## Tasks in Oracle Field Service/Laptop

A task is considered to be a unit of work. There are two kinds of tasks in the Oracle Field Service/Laptop application. There are the service request tasks and the personal tasks. The service request tasks are created during field service request screening and qualification in the office, or when working out in the field. These tasks are related to a specific problem that needs to be resolved through a service request. The personal tasks are created by yourself to block time in your Agenda for example to pay a visit to the dentist. The dispatcher or planner won't be able to plan a service request for you at that particular time.

Update task status in order to keep the schedule up to date and inform the dispatcher on the progress of your schedule. Update tasks also on type, and definition.

Create additional tasks when necessary. This option might be blocked by your administrator.

The Task Information screen offers the following information:

- Customer name
- Service Request number
- Task status, description, priority
- Time Options
- Address information for the task
- Creating additional tasks.
- Viewing and adding Task Notes

The following tasks can be performed:

- [Managing Task Information](#)
- [Updating Task Information](#)
- [Updating Task Time Options](#)
- [Viewing Task Address Information](#)

- [Creating Tasks from the Agenda](#)
- [Creating Tasks from the Service Request Explorer](#)
- [Creating Personal Tasks](#)

## Managing Task Information

Detailed information about the task has been sent along with the schedule. You are able to view, enter and update this information.

There are two ways to navigate to the Task Information screen: from the Agenda and from the Service Request Explorer.

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Click the **Information** button from the toolbar.
3. Double-click on the specific task. The Task Information screen opens.
4. To view Task information click the Task tab.
5. To set labor time click the Time Options tab.
6. To view address details and contact at customer click the Address tab.
7. To create a new task click the **Pylon** button.

## Updating Task Information

When you are working on a task you need to update the information sent along with the task. This information is used to update and monitor the service schedule.

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button from the dashboard. The Agenda or Service Request Explorer window opens.

2. Click the **Information** button on the toolbar.
3. Double-click on the specific task. The Task Information screen opens.
4. To update Task information click the Task tab.
5. To change the Task Status make a selection from the drop-down list.
6. To change Task Type make a selection from the drop-down list.
7. To change Priority make a selection from the drop-down list.
8. You can also enter a Description on the performed task.

## Updating Task Time Options

The period of time scheduled to perform a task relates to the task type. Similarly a period of time is allotted for travel to a task site. You need to update the time variable with the actual time it took you to travel there and to perform the task. This information is then used to update and monitor the service schedule.

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Click the **Information** button from the toolbar.
3. Double-click on the specific task. The Task Information screen opens.
4. Click the Time Options tab.
5. To change the scheduled time for the task change the Start and/or End time. The Set duration time will increase or decrease accordingly.
6. To change the travel time change the Scheduled travel duration Time.

## Viewing Task Address Information

It is possible that different tasks for one customer have different locations, therefore detailed task address information is included that details the address and customer contact information.

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Click the **Information** button from the toolbar.
3. Double-click on the specific task. The Task Information screen opens.
4. Click the Address tab. You are now able to view specific address information.

## Creating Tasks from the Agenda

Sometimes the tasks assigned to the service request by the dispatcher are not sufficient to complete the service request. You can create a task or multiple tasks for a service request while at work in the field.

There are two ways to create tasks from your agenda: from the service request column and from the task column.

### Prerequisites

A service request must exist or been created see [Managing Service Request Information](#).

### Steps

1. Click the **Agenda** button on the dashboard. The Agenda window appears.
2. Click the **Information** button on the toolbar.
3. To create a task from the task column double-click the specific task. The Task Information screen appears.
4. To create a task from the service request column double-click the specific service request. The Service Request Information screen appears.
5. For both the Service Request Information screen and the Task Information screen click the **Pylon** button. The Task Information screen opens.
6. Enter the task information at the **Task** tab.

A task number is automatically generated. Choose a Status, a Task type and a Severity from the corresponding drop down lists. Also enter a task description.

7. Click the **Time Options** tab. Set the start date and time, by default the current date and time are set. Set the end date and time, this will automatically be set in accordance with the Task type selected. Enter travel time if appropriate. View other scheduled tasks on the time line by selecting a date.
8. View address information for the task you are creating on the **Address** tab.
9. Save the Task.
10. Add another task by clicking the **Pylon** button.
11. Enter the corresponding service request information by clicking the **Service Request** button.

## Creating Tasks from the Service Request Explorer

Sometimes the tasks assigned to the service request by the dispatcher are not sufficient to complete the service request. You can create a task or multiple tasks for a service request while at work in the field.

There are two ways to create tasks from your the Service Request Explorer: from the Service Request Information screen and from the Task Information screen.

### Prerequisites.

A service request must exist.

### Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need. A tree with the installed base is shown.
3. Navigate through this tree by clicking the parts you want to see.  
All service requests and related tasks are shown on the right of the window.
4. Click the **Information** button on the toolbar.
5. To create a task at service request level double-click on the service request. The Service Request Information screen opens.
6. To create a task at task level double-click on the task. The Task Information screen opens.

7. For both the Service Request Information screen or the Task Information screen click the **Pylon** button. The Task Information screen opens.
8. Click the **Action** tab. A task number is automatically generated. Choose a Status, a Def.Work and a Priority from the corresponding drop-down lists. Also enter a task description.
9. Click the **Time Options** tab. Set the Start and End date and time, by default the current date and time are set. Enter travel time if appropriate. View other scheduled tasks on the time line by selecting a date.
10. Save the Task.Add another task by clicking the **Pylon** button.
11. Enter the corresponding service request information by clicking the **Service Request** button.

## Creating Personal Tasks

There are situations you need to make an appointment during your working day and you don't want the dispatcher to schedule a service request for you at that particular time. You can create personal non service request related tasks that will appear in your agenda as well as the dispatcher's or planner's agenda and they won't be able to schedule service requests for you. You can make a selection from pre-defined options for the personal task.

### Prerequisites

None.

### Steps

1. Click the **Agenda** button on the dashboard. The Agenda window appears.
2. Click the **Add Personal Task** button from the toolbar. The Personal Task Information screen appears.
3. Select a Status, Def. Work, and Priority from the drop-down lists.
4. Fill out the Time Options tab.
5. Save the personal task.

A non service request related entry appears in your Agenda with the starting time already entered.

### **Guidelines**

Before entering another personal task you will need to close the previous one by entering the Actual End time.



# Service Requests

## Service Requests in Oracle Field Service/Laptop

A service request is created when a customer contacts your organization with a problem he/she wants resolved. This service request is analyzed and tasks are assigned to it before it is sent to you by the dispatcher. Detailed information about the service request and related tasks is also sent along. You can view and update information such as detailed address information, additional notes, and an overview on the installed base and related tasks.

Update service requests on type, severity, problem, and solution, this information is stored in the knowledge base. The knowledge base is used to analyze the problem when a customer contacts your organization.

Create new service requests when necessary. This is normally only done with approval of the dispatcher/planner. This option might be blocked by your administrator.

The Service Request Information screen offers the following information:

- Customer name and address details
- Service request number
- Service request status, severity, and type
- Viewing and adding Problem and Solution notes.
- Installed Base at customer
- Related tasks
- Creating tasks
- Viewing and adding Service Request Notes

The following tasks can be performed regarding service requests:

- [Managing Service Request Information](#)
- [Updating Service Request Information](#)
- [Viewing Service Request Address Information](#)
- [Viewing and Updating Problem and Solution](#)

- [Viewing Installed Base at Customer](#)
- [Creating a Field Service Request](#)

## Managing Service Request Information

A lot of information about the service request has been send along with the schedule. You are able to view and update this information.

There are two ways to navigate to the Service Request Information screen: from the Agenda and from the Service Request Explorer.

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Click the **Information** button from the toolbar.
3. From the service request column double-click on the specific service request. The Service Request Information screen opens.
4. To view information on the service request click the **Service Request** tab. Service request type and dispatcher notes are shown. For more information see [Updating Service Request Information](#).
5. To view address information click the **Address** tab. Detailed information about the customers address is shown.
6. To view suggested problem and solution information click the **Problem/Solution** tab. For more information see [Viewing and Updating Problem and Solution](#).
7. To view the installed base click the **Installed base** tab. A tree with the installed base at the customer is shown.

## Updating Service Request Information

When working on a service request it is possible that information send to you about the service request is different from what you find out in the field. You can update this information.

There are two ways to navigate to the Service Request Information screen: from the Agenda and from the Service Request Explorer.

### **Prerequisites**

None.

### **Steps**

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Activate the **Information** button from the toolbar.
3. From the service request column double-click on the specific service request. The Service Request Information screen opens at the Service Request tab.
4. To update on the Service Request Type select another option from the drop-down list. Enter detailed information at the Notes box.
5. To update the suggested problem and solution click the Problem/Solution tab. Change the Problem and/or Solution by selecting another option from the corresponding drop-down lists.

## **Viewing Service Request Address Information**

Detailed address information for the service request has been send along to know exactly where to go and how to contact the customer.

There are two ways to navigate to the Service Request Information screen: from the Agenda and from the Service Request Explorer.

### **Prerequisites**

None.

### **Steps**

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Select the **Information** button from the toolbar.
3. From the service request column double-click on the specific service request. The Service Request Information screen opens.
4. Click the Address tab.

## Viewing and Updating Problem and Solution

A problem and solution description is send along with the schedule. When working on a service request it is possible that the suggested problem and solution are different from what you find out in the field. Use this procedure to view and update this information.

There are two ways to navigate to the Service Request Information screen: from the Agenda and from the Service Request Explorer.

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Select the **Information** button from the toolbar.
3. From the service request column double-click on the specific service request. The Service Request Information screen opens.
4. Click on the Problem/Solution tab.
5. To change the problem and/or solution note make a selection from the corresponding drop-down lists.

## Viewing Installed Base at Customer

Detailed information about the Installed base at the customer is send along with the schedule. Use this procedure to view the installed base.

There are two ways to navigate to the Service Request Information screen: from the Agenda and from the Service Request Explorer.

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Select the **Information** button from the toolbar.

3. From the service request column double-click on the specific service request. The Service Request Information screen opens.
4. Click on the Installed Base tab. A tree with the installed base is shown.

## Creating a Field Service Request

On occasion you may need to create a service request. You may encounter unlogged service requests or problems at the customer site.

There are two ways to create a service request from the Service Request Explorer: from the Customer Information screen and from Customer Product screen. From the Customer Information screen a service request is created without a relation to the installed base. To create a service request for a specific customer product you use the Customer Product screen.

### Prerequisites

None.

### Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need.
3. Click the **Information** button on the toolbar.
4. To create a service request at customer level double-click the customers name from the left-hand side of the window. The Customer Information screen opens.
5. To create a service request at product level double-click the part of the installed base from left-hand side of the window. The Customer Products screen opens.
6. From both the Customer Information and Customer Products screen click the **Create Service Request** button. The Service Request Information screen appears.
7. Click the **Service Request** tab. Choose a Severity, a Service type, and a Service Request Status from the drop-down lists.
8. Click the **Problem/Solution** tab. Choose Problem and Solution Notes from the drop-down lists.

9. Click the **Installed Base** tab. Enter the Customer Product number, this field is automatically populated when you are creating a service request from the Customer Product screen.
10. Save the Service Request.
11. If necessary create a task for the created service request by clicking the pylon button.

# Parts

## Parts Features

When performing service out in the field the location, ordering, and reporting on parts is very essential. There are two kinds of part types in the Oracle Field Service/Laptop application, there are task related parts, and non-task related parts. The difference between the two is the way the parts are handled and the options presented to you to do so.

The task related Parts screen enables you to view and report on transactions of parts that are related to the task, such as:

- View car stock and inventory
- Ordering parts for the task selected
- Ship parts for the task selected
- Reporting on returned parts for the selected task
- Reporting on used parts for the selected task

The non-task related Parts screen enables you to view and report on parts that are not related to tasks, use this to:

- View car stock and inventory
- Order parts that are not related to a customer or task
- Ship parts
- Report on returned parts
- Report on used parts

The following tasks can be performed regarding parts:

- [Managing Parts](#)
- [Reporting on Parts](#)

## Managing Parts

When working on a task in the field you use, order and replace parts. These could be parts specifically related to the task but could also be parts you generally use.

You can also view parts to see if you have the parts with you or that you will have to order them.

### **Prerequisites**

None.

### **Steps**

1. To manage non task related parts from the dashboard click the **Parts** button. The Parts screen opens.
2. To manage task related parts from the dashboard click the **Agenda** or the **Service Request Explorer** button.
  - a. From the toolbar activate the **Parts** button.
  - b. Double click the specific task. The Parts window opens.
3. Choose a category from the drop down list.
4. At the bottom of the screen you can view a list of parts based on the option selected from the Transaction type drop-down list. This could be a list for the specific task or a complete list.

## **Reporting on Parts**

When working on a task in the field you use, order and replace parts. These could be parts specifically related to the task but could also be parts you generally use. You can also view parts to see if you have the parts with you or that you will have to order them.

### **Prerequisites**

None.

### **Steps**

1. To select a non task related part, from the dashboard click the **Parts** button. The Parts screen opens.
2. To select a task related part from the dashboard click the **Agenda** or the **Service Request Explorer** button.
  - a. From the toolbar activate the **Parts** button.
  - b. Double click the specific task. The Parts window opens.

3. Choose a Category from the drop down list.
4. To select from all parts check the Show all items box. To select from secondary inventory make a selection from the Secondary Inv. drop down list and Locator drop down list.
5. Search on Item or on Description by clicking the column header and start typing the first number(s) or character(s).
6. Double-click on the part of your choice.
7. Select an option from the Transaction type drop-down list for the selected part.
8. Fill out the set of tabs that come up with the Transaction type selected.
9. Press **OK** when finished.



# Field Service Report

## Field Service Report Features

When you have completed a task, you must document the time, material and effort involved in completing that task. The field service report is used to view, add, and update on labor time, parts used, and expenses made for the specific task or service request. The field service report is divided into sections to access and store this information.

You can print the field service report as a work form or job sheet, the look can be customized to your needs. By default some options will be given, contact your administrator for more options.

Make sure everything is reported correctly, an invoice based on the information from the field service report is generated when the task information has been synchronized. Report on the following:

- Reporting on Labor, define the different types of labor performed to complete a task, this can also be done from the Agenda.
- Reporting on Parts, report on all the materials involved to complete a task, the task related Parts screen is opened to do so. For more information see Parts Features.
- Reporting on Expenses, define the different types and amount of expenses made to complete a task.

The following tasks can be performed with the field service report:

- [Managing Field Service Report](#)
- [Adding or Editing Expenses](#)
- [Adding or Editing Labor](#)

## Managing Field Service Report

When you finished your task or service request you need to report on labor time, expenses made, and parts used. Field Service Report allows you to do this for a specific service request or task and print an overview of all labor, parts, and expenses for the service request or task for the customer.

There are two ways to navigate to the Field Service Report screen: from the Agenda and from the Service Request Explorer.

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer screen opens.
2. Select the **Field Service Report** button from the toolbar.
3. Double-click on the specific service request or task to report on. The Field Service Report window opens.
4. If your system is configured with more than one field service report, type or select your desired report in the list box located in the upper left part of the screen.
5. To edit or add a part click on the **Parts** button. For more information see [Reporting on Parts](#).
6. To edit or add a labor line click on Labor. For more information, see [Adding or Editing Labor](#).
7. To edit or add an expense click on Expense. For more information, see [Adding or Editing Expenses](#).
8. To print the Field Service Report select the **Print** button from the toolbar.

## Adding or Editing Expenses

Use this procedure to report on expenses.

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Select the **Field Service Report** button from the toolbar.

3. Double-click on the specific service request or task to report on. The Choose Field Service Report screen opens.
4. Make a selection from the drop down list. The Field Service Report screen of your choice is opened.
5. To edit an Expense select an expense.
6. To add a Labor click **Add**.
7. Choose an Expense type from the drop down list.
8. Choose an Expense item from the drop down list.
9. Enter the amount of money paid at Price.
10. Choose a Currency from the drop down list for the amount entered.
11. Enter a Quantity for the selected expense.
12. Choose an UOM from the drop down list for the quantity entered.
13. Click **Save** to save the expense.

## Adding or Editing Labor

Use this procedure to report on Labor from the Field Service Report screen.

Reporting on labor can also be done from the Agenda. For more information, see [Agenda Features](#).

### Prerequisites

None.

### Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Select the **Field Service Report** button from the toolbar.
3. Double-click on the specific service request or task to report on. The Choose Field Service Report screen opens.
4. Make a selection from the drop down list. The Field Service Report screen of your choice is opened.
5. To edit a Labor select a labor.

6. To add a Labor click **Add**.
7. Enter the start time at Start.
8. Enter the end Time at End.
9. Choose a Labor type from the drop down list.
10. Choose a Labor item from the drop down list.
11. Enter Start and End Mileage.
12. Click **Save** to save the labor.

# Service Request Explorer

## Service Request Explorer Features

Use the Service Request Explorer to search for customer, product, or service request information in different ways. The information is always presented with the customers and products on the left-hand side of the screen and the related service requests and tasks on the right-hand side of the screen. There are several default search options available, contact your administrator for more options.

The following information is available:

- Search for customers, service requests, and tasks
- Customer information and notes
- Customer product information and notes
- Service request, and task information
- Create service requests (this option might be blocked by your administrator)
- Create tasks
- Create field service reports for tasks or service requests
- Counter readings for customer products

The following tasks can be performed with the service request explorer.

- [Working with the Service Request Explorer](#)
- [Search for Customer Information](#)
- [Search for Customer Products](#)
- [Searching for Service Requests](#)

## Working with the Service Request Explorer

Within the service request explorer you are able to search and present information in different ways. You can view customer and product information. You can also create, view, and update service requests and tasks.

### **Prerequisites**

None.

### **Steps**

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop down list under Customers on the left or Service Requests on the right of the window to perform a search query. The query screen opens.

It is possible to create customized search query's for you, ask your Administrator.

3. In the query screen enter specific data to search for or enter just the first characters and an asterisk(\*) to broaden your search.
4. Click **OK** to start the search query. The customer and product information is presented in a tree on the left and the service request and task information on the right side of the window.
5. Navigate through this tree by clicking on the parts you want to see, the tree will unfold.

At all levels you are able to view the service requests and related tasks on the right-hand side of the window.

6. By clicking the telephone icon in the Customers list you can quickly search again using the same properties.

## **Search for Customer Information**

From within the Service Request Explorer you can search for and view detailed customer information.

### **Prerequisites**

None.

### **Steps**

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list under Customers on the left of the window to view information.

A list of all customers or one specific customer and a tree with the installed base is shown.

3. Double-click on the customer's name. The Customer Information screen is opened.

On this screen all customer information is shown.

## Search for Customer Products

From within the Service Request Explorer you can search for and view detailed product information.

### Prerequisites

None.

### Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list under Customers on the left of the window to view information.

A list of all customers or one specific customer and a tree with the installed base is shown.

3. Double-click on a part of the installed base. The Customer Products screen is opened.
4. Click the Object tab to view general information such as install date and item description on the specific product.
5. Click the Address tab to view the detailed location of the specific product.
6. Click the Notes tab to view detailed information such as history and technical information on the specific product.

## Searching for Service Requests

You can search for service requests based on service request properties or based on customer or product configuration.

### Prerequisites

None.

### Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list under Customers on the left or Service Requests on the right of the window.

A tree with the service requests and related tasks is shown on the right of the window.

3. Double-click the service request of your choice.

# Views

## Views Features

Use the Views window to generate reports detailing the service information that is present on your Laptop device. Select the type of view you want to generate from the options presented to you in the Views screen.

The type of view you are able to generate depend on the set of views that is created for you by default. Contact your administrator for more information about creating additional types of views.

The following tasks can be performed with views:

- [Generating Views](#)

## Generating Views

With views you can query your local data and present or print it in a spreadsheet like way.

### Prerequisites

None.

### Steps

1. Click the **Views** button on the dashboard. The Views screen opens.
2. Select a report from the list box in the upper left corner.

Depending on the selected view, you need to enter organization ID in order to generate the view you desire. The view appears on your screen.

3. View the query on your screen or click the **Print** button to print the view.



# Counters

## Counters Features

A counter is an entity that records usage of a product. A lot of machines you are servicing contain one or multiple counters for all kinds of purposes. This could be a gas meter, a water meter but also a copier, or a printer could contain a counter. A selection of counters with their last reading on the machine you are servicing have been sent along with this task. Each counter consists of the following:

- Name
- Value
- Unit of measure
- Timestamp

The following tasks can be performed regarding counters:

- [Adding and Resetting a Counter Reading](#)
- [Adding a Miscellaneous Counter Reading](#)
- [Editing and Resetting Counter Readings](#)

## Adding and Resetting a Counter Reading

A set of counters with readings on the product you are servicing are sent along with the schedule. Use this procedure to add a new reading or reset a counter.

### Prerequisites

None.

### Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need.

3. Double-click on the product you want to add a reading for. The Customer Products screen opens.
4. Click the **Counters** button. The Counter Form screen opens.
5. Select a Counter on the left of the window.
6. Click **New**.
7. Enter a value at Counter Reading.
8. Check the **Reset Flag** to reset the counter
9. Enter the last reading on the counter before resetting it at Pre Reset Last Reading.
10. Enter the first reading after resetting the counter at Post Reset First Reading.
11. Enter a description at Reset Reason.
12. Click **Save** to save the reading.

## Adding a Miscellaneous Counter Reading

A set of counters with readings on the product you are servicing are sent along with the schedule. Use this procedure to add a miscellaneous reading for a counter.

### Prerequisites

None.

### Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need.
3. Double-click on the product you want to add a reading for. The Customer Products screen opens.
4. Click the **Counters** button. The Counter Form screen opens.
5. Select a Counter on the left of the window.
6. Click **New**.
7. Enter a value at Counter Reading.

8. Choose a Miscellaneous Reading Type from the drop down list.
9. Enter a value at Misc. Reading.
10. Click **Save** to save the reading.

## Editing and Resetting Counter Readings

A set of counters with readings on the product you are servicing are sent along with the schedule. Use this procedure to edit an existing reading or reset an existing reading for a counter.

### Prerequisites

None.

### Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need.
3. Double-click on the product of your choice. The Customer Products screen opens.
4. Click the **Counters** button. The Counter Form opens.
5. Select a Counter on the left of the window.
6. Select the reading you want to update or reset from Reading.
7. Click the **Edit** button.
8. Edit the Counter Reading or Miscellaneous Reading.
9. Check the **Reset Flag** to reset the counter
10. Enter the last reading on the counter before resetting it at Pre Reset Last Reading.
11. Enter the first reading after resetting the counter at Post Reset First Reading.
12. Enter a description at Reset Reason.
13. Click **Save** to save changes.

