

# Oracle<sup>®</sup> Field Service

Implementation Guide

Release 11*i*

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**Oracle Field Service Implementation Guide, Release 11*i*.**

**Part No. A86153-02**

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# Preface

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

This Implementation Guide provides information and instructions to help you implement Oracle Field Service effectively.

This preface explains how the Implementation Guide is organized and introduces other sources of information that can help you.

## Intended Audience

This guide is aimed at the following users:

- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility

## Structure

This manual contains the following chapters:

“Implementing Field Service” provides overviews of the implementation and its components to perform essential business tasks, as well as the application’s relationships to other Oracle or third-party applications. It provides process-oriented, task-based procedures for setting up the application.

## Related Documents

For more information, see the following manuals:

- *Installing Oracle Applications, Release 11i*

- *Implementing CRM Applications*
- *Oracle Field Service Concepts and Procedures*
- *Oracle Foundation Concepts and Procedures*

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# Implementing Field Service

This topic group provides general descriptions of the setup and configuration tasks required to implement the Field Service application successfully.

Topics covered are:

- [Implementation Overview](#)
  - [Implementing Flowchart](#)
  - [Implementing Checklist](#)
- [Implementing Steps](#)
- [Setting Up Field Service](#)
  - [Assign Territories to Planner Groups](#)
  - [Resources Subinventories Assignment](#)
  - [Generating Shift Tasks](#)
  - [Profile Options](#)

## Implementation Overview

Before setting up Field Service, you must install and fully implement these Oracle applications or components:

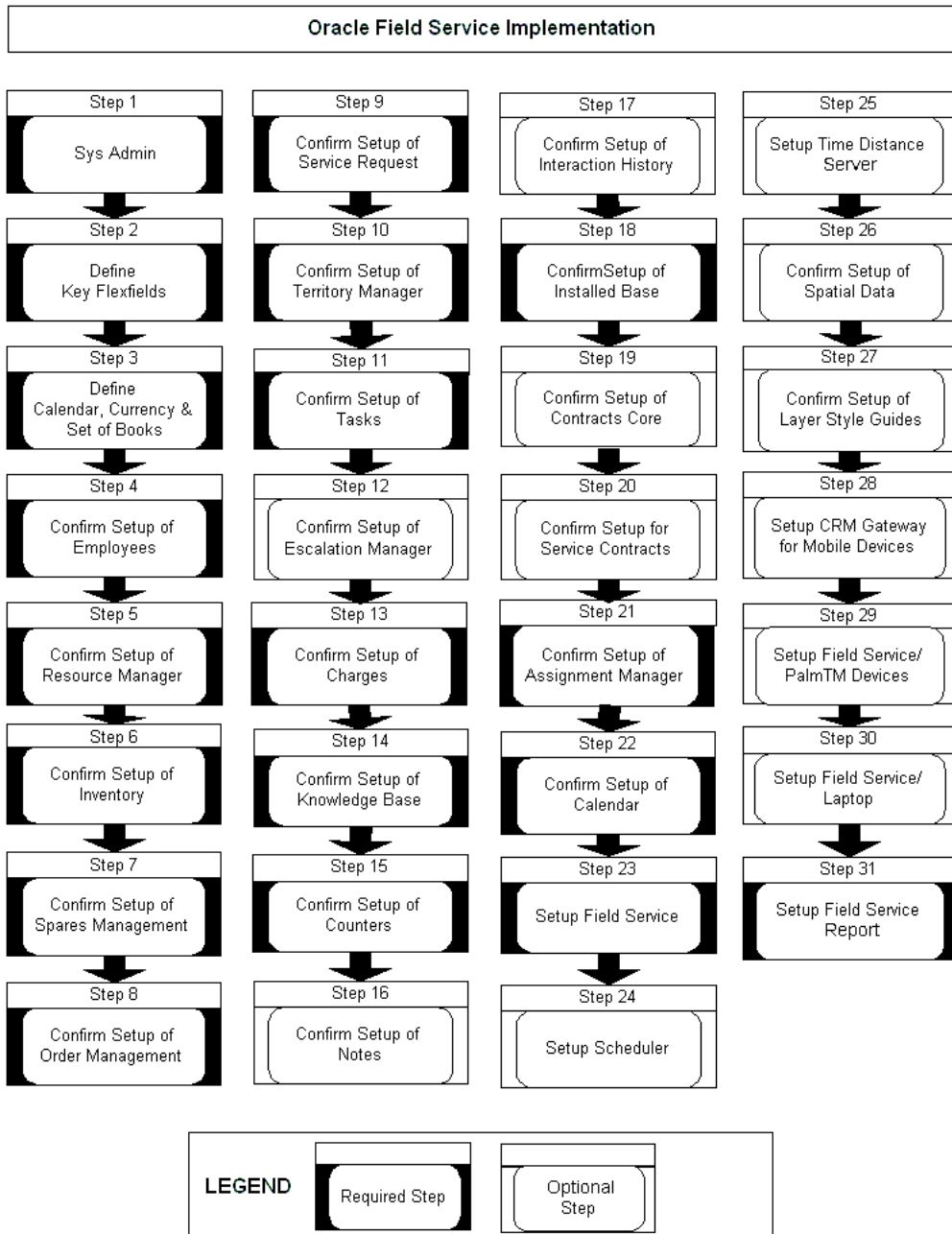
- Oracle Human Resources
- Oracle Inventory
- Service Core
- Order Management
- Assignment Manager
- Resource Manager
- Territory Manager
- Spares Management
- Tasks
- Calendar

For information regarding the installation and implementation of these applications and components, see the appropriate documentation for each product.

The implementation steps described here are tasks that are necessary to use the additional functionality included with Field Service.

## Implementing Flowchart

While you can implement Field Service in many different ways, the following flow chart shows the recommended order:



## Implementing Checklist

Complete the following implementation steps in sequential order.

Step	Required	Step Title
1.	Yes	Sys Admin
2.	Yes	Define Key Flexfields
3.	Yes	Define Calendar, Currency & Set of Books
4.	Yes	Confirm Setup of Employees
5.	Yes	Confirm Setup of Resource Manager
6.	Yes	Confirm Setup of Inventory
7.	Yes	Confirm Setup of Spares
8.	Yes	Confirm Setup of Order Management
9.	Yes	Confirm Setup of Service Request
10.	Yes	Confirm Setup of Territory Manager
11.	Yes	Confirm Setup of Tasks
12.	Yes	Confirm Setup of Escalation Manager
13.	Yes	Confirm Setup of Charges
14.	Yes	Confirm Setup of Knowledge Base
15.	Yes	Confirm Setup of Counters
16.	Optional	Confirm Setup of Notes
17.	Optional	Confirm Setup of Interaction History
18.	Yes	Confirm Setup of Installed Base
19.	Optional	Confirm Setup of Contracts Core
20.	Optional	Confirm Setup of Service Core
21.	Yes	Confirm Setup of Assignment Manager
22.	Yes	Confirm Setup of Calendar
23.	Yes	Setup Field Service
24.	Optional	Setup Scheduler
25.	Optional	Setup Time Distance Server

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<b>26.</b>	Optional	Confirm Setup of Spatial Data
<b>27.</b>	Optional	Confirm Setup of Layer Style Guides
<b>28.</b>	Optional	Setup CRM Gateway for Mobile Devices
<b>29.</b>	Optional	Setup Field Service/Palm™ Devices
<b>30.</b>	Optional	Setup Oracle Field Service/Laptop
<b>31.</b>	Yes	Setup Field Service Report

## Implementing Steps

Perform the following implementation steps in sequential order:

### Step 1: Set Up System Administrator

This step involves the following tasks:

- Define responsibilities. For more information, see: *Oracle Applications System Administrator's Guide*.
- Set up printers (optional). For more information, see: *Setting Up Your Printers, Oracle Applications System Administrator's Guide*.

### Step 2: Define Key Flexfields

If you are, or will be, fully installing other applications, such as Oracle Human Resource Management or Oracle Inventory, be sure to coordinate with those products' flexfield Setup before defining the key flexfields here, as it is not recommended to change flexfields frequently. For more information, see: *Oracle Applications Flexfields Guide*.

For each key flexfield, you perform the following tasks, some of which are optional for some flexfields:

- Define the flexfield structure.
- Define value sets.
- Define flexfield segments.
- Define flexfield segment values.
- Define security rules.
- Assign security rules.
- Define roll-up groups.
- Define cross-validation rules.

Set up the following Accounting flexfield. You may not need to perform this step if you have already installed and set up Oracle General Ledger or performed a common-applications Setup. For more information, see *Oracle General Ledger User's Guide*.

Set up the following Human Resources key flexfields. You may not need to set up these key flexfields if you have already installed and set up Oracle Human Resource

Management Systems or performed a common–applications Setup. For more information, see: *Oracle Human Resources User's Guide*.

- Grade flexfield
- Job flexfield
- Position flexfield
- People Group flexfield

### Step 3: Define Calendars, Currencies, and Set of Books

If you have defined your calendars, currencies, and set of books while setting up a different Oracle Applications product, proceed to the next step. However, if you are performing a Multi–Org implementation, see the note below.

Context: If you are performing a Multi–Org implementation, you may optionally create more than one calendar, currency, or set of books. For more information, see: *Multiple Organizations in Oracle Applications*.

This step involves the following tasks:

- Set up calendars:
- Define period types. For more information, see: *Defining Period Types, Oracle General Ledger User's Guide*.
- Define accounting calendar. For more information, see: *Defining Calendars, Oracle General Ledger User's Guide*.
- Define transaction calendar. For more information, see: *Defining Transaction Calendars, Oracle General Ledger User's Guide*. (Optional)
- Define workday calendar. For more information, see: *Overview of Workday Calendar, Oracle Bills of Material User's Guide*. (Optional)
- Define exception templates. For more information, see: *Creating a Workday Exception Template, Oracle Bills of Material User's Guide*. (Optional)
- Define currencies. For more information, see: *Defining Currencies, Oracle General Ledger User's Guide*.
- Define conversion rate types. For more information, see: *Defining Conversion Rate Types, Oracle General Ledger User's Guide*.
- Assign your set of books to a responsibility. For more information, see: *Oracle General Ledger User's Guide*.

- Set up currency rates.
- Set up accounting code combinations. For more information, see: *Oracle General Ledger User's Guide*.
- Open and close accounting periods. For more information, see: *Opening and Closing Accounting Periods, Oracle General Ledger User's Guide*.

## Step 4: Confirm Setup of Employees

Please refer to the appropriate section in *Oracle Human Resource Management Systems* used to enter and maintain employees.

## Step 5: Confirm Setup of Resources

Make sure you set up Resource Manager as described in Implementing Oracle Resource Manager in *Oracle CRM Foundation Implementation Guide*.

Setup resources in the Resource Manager application. Ensure that all the following steps have been reviewed and completed:

- Setup service representatives. In Resource Manager assign role 'Field Service Representative' to a resource to make it visible in the Control Tower.  
  
A field service representative does not have to be defined as an employee and does not have to be an Oracle Applications User.
- Setup planners. A planner does not need a specific role assigned. You can assign the role 'Field Service Dispatcher' in Resource Management.  
  
A planner needs to be defined as an employee and assigned an Oracle Applications User. Define the planner as an employee and import the employee into Resource Management to define it as a resource. It is then automatically assigned an Oracle Applications User.
- Create planner groups by creating resource groups with only planners assigned to it. The planner groups are used to assign groups of service representatives created in Territory Management to.

## Step 6: Confirm Setup of Inventory

Make sure you set up Inventory as described in *Overview of Setting Up, Oracle Inventory User's Guide*. Ensure that all the following required steps have been reviewed and completed as necessary:

- Define Sub-inventories

A standard setup is required for each sub-inventory.

## **Step 7: Confirm Setup of Spares Management**

Please refer to *Oracle Spares Management Implementation Guide* for Spares Management setup.

## **Step 8: Confirm Setup of Order Management**

Make sure you set up Order Management as described in Overview of Setting Up, *Oracle Order Management User's Guide*. Ensure that all the required steps have been reviewed and completed as necessary:

- Profile Options
- Parameters
- Invoicing
- Sales persons
- Tax
- Quick Codes
- Workflow
- Document Sequences
- Order Import Sources
- Customer Classes
- Customers
- Transaction Types
- Cost of Goods Sold
- Processing Constraints
- Defaulting Rules
- Credit Checking
- Holds
- Attachments
- Freight Charges and Carriers

- Pricing
- Shipping

## Step 9: Confirm Setup of Service Request

Please refer to the appropriate section from *Oracle Support Implementation Guide* for Service Request setup.

## Step 10: Confirm Setup of Territory Manager

Make sure you set up territories as described in Implementing Territory Management, *Oracle CRM Foundation Implementation Guide*.

Setup territories in the Territory Manager application. Ensure that all the following steps have been reviewed and completed:

- Create territories with only service representatives assigned to it. The territories are used to connect to the planner groups created in Resource manager, during the setup of Field Service.

## Step 11: Confirm Setup of Tasks

Please refer to the appropriate section from *Oracle CRM Foundation Implementation Guide* for Task setup.

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**Note:** Set Task\_Type = 'DISPATCH' for all Field Service specific tasks to enforce dispatch business logic like making the service request and task address mandatory. The address is necessary for scheduling tasks.

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## Step 12: Confirm Setup of Escalations Manager

Please refer to the appropriate section from *Oracle CRM Foundation Implementation Guide* for Escalations Manager setup.

## Step 13: Confirm Setup of Charges

Please refer to the appropriate section from *Implementing Oracle Service Core* for Charges setup in the iHelp system.

**Step 14: Confirm Setup of Knowledge Base**

Please refer to the appropriate section from *Implementing Oracle Service Core* for Knowledge Management setup in the iHelp system.

**Step 15: Confirm Setup of Counters**

Please refer to the appropriate section from *Implementing Oracle Service Core* for Counters setup in the iHelp system.

**Step 16: Confirm Setup of Notes**

Please refer to the appropriate section from *Oracle CRM Foundation Implementation Guide* for Notes setup and to define source types.

**Step 17: Confirm Setup of Interaction History**

Please refer to the appropriate section from *Oracle CRM Foundation Implementation Guide* for Interaction History setup.

**Step 18: Confirm Setup of Installed Base**

Make sure you set up Installed Base as described in *Implementing Oracle Service Core* in the iHelp system.

**Step 19: Confirm Setup of Contracts Core**

Please refer to *Implementing Oracle Contracts Core* for Contracts setup in the iHelp system.

**Step 20: Confirm Setup of Service Contracts**

Please refer to *Implementing Oracle Contracts for Service* for Service Contracts setup in the iHelp system.

**Step 21: Confirm Setup of Assignment Manager**

Please refer to the appropriate section from *Oracle CRM Foundation Implementation Guide* for Assignment Manager setup.

Please ensure the following profile options are set before using Field Service.

The profile options are set at the application level and are unique to Assignment Manager.

You can set these options in any sequence.

Step	Option	Description
1	Activate Auto Selection of Resources	To activate auto selection of resources. Default set to: Y (yes).
2	Activate Workflow Name	To activate the workflow plug-in. Default set to: "None".
3	Activate Installed Base Preferred Resource	To retrieve preferred resource information from the installed base application. Default set to: Y (yes).
4	Activate Contracts Preferred Resources	To retrieve preferred resource information from the contracts application. Default set to: Y (yes).

## Step 22: Confirm Setup of Calendar

Make sure you set up calendar as described in *Oracle CRM Foundation Implementation Guide*.

Setup shifts in the calendar application. Ensure that all the following steps have been reviewed and completed:

- Create shifts for each service representative.

## Step 23: Setup Field Service

Make sure you setup Field Service as described in [Setting Up Field Service](#). This step involves the following tasks:

- [Assign Territories to Planner Groups](#)
- [Resources Subinventories Assignment](#)
- [Generating Shift Tasks](#)
- [Profile Options](#)

## Step 24: Setup Scheduler

Make sure you set up Scheduler as described in *Oracle Scheduler Implementation Guide*.

## Step 25: Setup Time Distance Server

The setup for Time Distance Server is done by setting the following Field Service specific profile options:

You can set these options in any sequence.

1.	CSF: Default travel distance for Time Distance Server	If no geocode exist for a task the value is used as the default travel distance between two tasks.  Note: When a value is entered this is always used to indicate travel distance and overrules the capability to calculate it with the Time Distance Server.
2.	CSF: Default travel duration for Time Distance Server	If no geocode exist for a task the value is used as the default travel duration between two tasks.  Note: When a value is entered this is always used to indicate travel duration and overrules the capability to calculate it with the Time Distance Server.
3.	CSF: Location Finder Installed	Value set to check if the location finder is installed. It is launched when a location for a task is missing, see profile option <a href="#">CSR: Create location</a> .  Note: This profile option needs to be set only when using Oracle Scheduler
4.	CSF: Time distance server calculation factor	If the factor is set the Time Distance Server calculates travel distance and duration faster but less accurate.  Note: This profile option needs to be set only when using Oracle Scheduler

## Step 26: Confirm Setup of Spatial Data

Spatial data is used for Map Display, Route Calculation and Location finding, it provides the TimeDistance Server with route information and the location finder with address information. Map Display is directly available to the user as part of the control tower functionality. The TimeDistance Server uses spatial data to calculate travel time and distances for Field Service and Scheduler. The same applies to the location finder for address information.

After installing spatial data, check whether the data is csf\_loaded into the system correctly. Perform the following checks:

- Check if the Spatial Data Option is Installed
- Check whether the Data Tables are Empty or not

- Check if the Normal and Spatial Indexes are Created

### **Check if the Spatial Data Option is Installed**

Even though it's impossible to load spatial data when the spatial data cartridge is not installed, a DBA task is to check whether it is installed. The MDSYS user schema must be there.

### **Check whether the Data Tables are Empty or Not**

The following data tables contain the necessary spatial data. For each country, the number of rows in each table might differ.

Check as a user with DBA access that none of the following data tables are empty:

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**Note:** Please note that the installation script delivered with the data should provide for this. The above is only required when a confirmation test is needed.

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CSF.CSF\_LF\_BLOCKS  
CSF.CSF\_LF\_NAMES  
CSF.CSF\_LF\_PLACES  
CSF.CSF\_LF\_PLACE\_NAMES  
CSF.CSF\_LF\_PLACE\_POSTCS  
CSF.CSF\_LF\_POIS  
CSF.CSF\_LF\_POI\_NAMES  
CSF.CSF\_LF\_POSTCODES  
CSF.CSF\_LF\_ROADSEGMENTS  
CSF.CSF\_LF\_ROADSEGM\_NAMES  
CSF.CSF\_LF\_ROADSEGM\_PLACES  
CSF.CSF\_LF\_ROADSEGM\_POSTS  
CSF.CSF\_MD\_ADM\_BOUNDS  
CSF.CSF\_MD\_HYDROS  
CSF.CSF\_MD\_INST\_STYLE\_SHTS

CSF.CSF\_MD\_LAND\_USES  
CSF.CSF\_MD\_LYR\_METADATA  
CSF.CSF\_MD\_LYR\_STYLE\_SHTS  
CSF.CSF\_MD\_NAMES  
CSF.CSF\_MD\_POIS  
CSF.CSF\_MD\_POI\_NM\_ASGNS  
CSF.CSF\_MD\_RAIL\_SEGS  
CSF.CSF\_MD\_RDSEG\_NM\_ASGNS  
CSF.CSF\_MD\_RD\_SEGS  
CSF.CSF\_MD\_THEME\_METADATA  
CSF.CSF\_SDM\_CTRY\_PROFILES  
CSF.CSF\_TDS\_CONDITIONS  
CSF.CSF\_TDS\_COND\_SEGS  
CSF.CSF\_TDS\_INTERVALS  
CSF.CSF\_TDS\_NODES  
CSF.CSF\_TDS\_RDBLCK\_INTVLS  
CSF.CSF\_TDS\_RDBLCK\_SGMNTS  
CSF.CSF\_TDS\_ROADBLOCKS  
CSF.CSF\_TDS\_SEGMENTS  
CSF.CSF\_TDS\_SEGM\_NODES  
CSF.CSF\_TDS\_TILES  
CSF.CSF\_TDS\_BINARY\_MAPS  
CSF.CSF\_TDS\_BINARY\_TILES  
CSF.CSF\_TDS\_BINARY\_MAPS\_COPY

### Check if the Normal and Spatial Indexes are Created

After loading the spatial data, indexes have to be created to achieve optimal performance. These indexes should exist and have status VALID. If these don't exist or are invalid, the performance will be less. A particular statement to see the list of indexes:

```
select object_name, object_type from all_objects
where object_name like 'CSF%'
and OBJECT_TYPE = 'INDEX';
```

The list indexes are:

```
CSF.CSF_MD_RDSEGS_N1
CSF.CSF_MD_RDSEG_NM_ASGNS_N1
CSF.CSF_MD_RDSEG_NM_ASGNS_N2
CSF.CSF_MD_NAMES_N1
CSF.CSF_MD_ADM_BNDS_N1
CSF.CSF_MD_RD_SEGS_N1
CSF.CSF_MD_HYDROS_N1
CSF.CSF_MD_RLSEGS_N1
CSF.CSF_MD_LND_USE_N1
CSF.CSF_MD_POIS_N1
CSF.CSF_LF_BLOCKS_N1
CSF.CSF_LF_BLOCKS_N2
CSF.CSF_LF_NAMES_N1
CSF.CSF_LF_NAMES_N2
CSF.CSF_LF_PLACES_U1
CSF.CSF_LF_PLACES_N2
CSF.CSF_LF_PLNMS_U1
CSF.CSF_LF_PLPCS_N1
CSF.CSF_LF_PLPCS_N2
CSF.CSF_LF_POIPL_N1
```

CSF.CSF\_LF\_POIS\_N1  
CSF.CSF\_LF\_PNAMES\_N1  
CSF.CSF\_LF\_PNAMES\_N2  
CSF.CSF\_LF\_POSTCODES\_N1  
CSF.CSF\_LF\_POSTCODES\_N2  
CSF.CSF\_LF\_RDSEGS\_N1  
CSF.CSF\_LF\_RDSEGNMS\_N1  
CSF.CSF\_LF\_RDSEGNMS\_N2  
CSF.CSF\_LF\_RDSEGPL\_N1  
CSF.CSF\_LF\_RDSEGPL\_N2  
CSF.CSF\_LF\_RDSEGMPC\_N1  
CSF.CSF\_LF\_RDSEGMPC\_N2  
CSF.CSF\_TDS\_BINARY\_TILES\_N1  
CSF.CSF\_TDS\_BINARY\_TILES\_N2  
CSF.CSF\_TDS\_BINARY\_TILES\_N3  
CSF.CSF\_TDS\_TILES\_N1  
CSF.CSF\_TDS\_TILES\_N2  
CSF.CSF\_TDS\_TILES\_N3  
CSF.CSF\_TDS\_TILES\_N4  
CSF.CSF\_TDS\_SEGMENTS\_N1  
CSF.CSF\_TDS\_SEGMENTS\_N2  
CSF.CSF\_TDS\_SEGMENTS\_N3  
CSF.CSF\_TDS\_SEGMENTS\_N4  
CSF.CSF\_TDS\_SEGM\_NODES\_N1  
CSF.CSF\_TDS\_SEGM\_NODES\_N2  
CSF.CSF\_TDS\_SEGM\_NODES\_N3  
CSF.CSF\_TDS\_SEGM\_NODES\_N4  
CSF.CSF\_TDS\_SEGM\_NODES\_N5

CSF.CSF\_TDS\_NODES\_N1  
CSF.CSF\_TDS\_NODES\_N2  
CSF.CSF\_TDS\_NODES\_N3  
CSF.CSF\_TDS\_NODES\_N4  
CSF.CSF\_TDS\_NODES\_N5  
CSF.CSF\_TDS\_NODES\_N6  
CSF.CSF\_TDS\_CONDITIONS\_N1  
CSF.CSF\_TDS\_CONDITIONS\_N2  
CSF.CSF\_TDS\_COND\_SEGS\_N1  
CSF.CSF\_TDS\_COND\_SEGS\_N2  
CSF.CSF\_TDS\_COND\_SEGS\_N3  
CSF.CSF\_TDS\_ROADBLOCKS\_N1  
CSF.CSF\_TDS\_ROADBLOCKS\_N2  
CSF.CSF\_TDS\_RDBLCK\_INTVLS\_N1  
CSF.CSF\_TDS\_RDBLCK\_INTVLS\_N2  
CSF.CSF\_TDS\_RDBLCK\_SGMNTS\_N1  
CSF.CSF\_TDS\_RDBLCK\_SGMNTS\_N2  
CSF.CSF\_TDS\_RDBLCK\_SGMNTS\_N3  
CSF.CSF\_TDS\_INTERVALS\_N1  
CSF.CSF\_TDS\_INTERVALS\_N2

## Step 27: Confirm Setup of Style Sheet

After installing spatial data, check whether the data is `csf_loaded` into the system correctly. Perform the following additional checks:

- Check whether the Layer Style Sheets Tables are not Empty
- Check Map Display

### **Check Whether the Layer Style Sheets Tables are not Empty**

The following tables contain the layer sheets information:

CSF.CSF\_MD\_INST\_STYLE\_SHTS

CSF.CSF\_MD\_LYR\_METADATA

CSF.CSF\_MD\_LYR\_STYLE\_SHTS

Layer style sheets define the “display” of the spatial data. These are all predefined and optimized for the data set used but it is possible to modify the style sheets. It is recommended to involve a consultant with experience in Geographic Information to define alternative settings in the layer style sheets.

By default in the style sheets it is defined per spatial object type (i.e., motorway, waterway, residential area, etc.) how and under what conditions it is displayed. For example when looking at an entire country there is no reason to display “local roads” as this kind of detail shows up as a colored blob on the screen. Also every object is given its own color. The color to display a road is different depending on the part of the world one is in, the style sheet also describes this information.

Knowledge required to modify the layer style sheets besides Oracle database is:

- Spatial cartridge and some geographic experience

### Check Map Display

After the preceding checks, perform a quick check to see if the data is really there.

1. Navigate to the Control Tower in the Field Service application.
2. Select the Map.
3. Enter the user-id/password of the geographical database at the left of the **Init** button.
4. Click **Init**. The Map displays. Should it not be visible select zoom out.

When the map doesn't display at all, the data isn't there.

## Step 28: Setup CRM Gateway for Mobile Devices

Make sure you set up CRM Gateway for Mobile Devices as described in *Oracle CRM Gateway for Mobile Devices Implementation Guide*. Ensure that all the steps have been reviewed and completed as necessary.

## Step 29: Setup Oracle Field Service/Palm™ Devices

Make sure you set up Oracle Field Service/Palm™ Devices as described in *Oracle Field Service/Palm™ Devices Implementation Guide*. This includes the following setup screens on the CRM Enterprise database:

- Resources Subinventories Assignment
- Configuration Parameters

### **Step 30: Setup Oracle Field Service/Laptop**

Make sure you set up Oracle Field Service/Laptop as described in *Oracle Field Service/Laptop Implementation Guide*. This includes the following setup screens on the CRM Enterprise database:

- Resources Subinventories Assignment
- Agenda Layout
- Configuration Parameters
- Field Service Report Type
- Field Service Report Manager
- User Defined Queries

The following tasks need to be performed on the laptop device:

- Enabling Communication on the Laptop Device

### **Step 31: Setup Field Service Report**

There is no specific setup required for implementing Field Service Report.

## Setting Up Field Service

Setting up the Field Service application includes the following setup steps, perform these steps in sequential order:

Step	Description
1. <a href="#">Assign Territories to Planner Groups</a>	Use this Field Service setup screen to connect the groups of service representatives, territories, to the planner groups. These service representatives are shown to the planner in the control tower by default.
2. <a href="#">Resources Subinventories Assignment</a>	Use this setup screen in Field Service > Spares Management to connect sub inventories to service representatives.
3. <a href="#">Generating Shift Tasks</a>	Use this Field Service concurrent program to create departure and arrival tasks for field service representatives based on their shifts. These tasks are used for scheduling
4. <a href="#">Profile Options</a>	Set all the field service specific profile options. Additionally set the following profile options: <ul style="list-style-type: none"><li>■ TCF: HOST</li><li>■ TCF: PORT</li></ul>

## Assign Territories to Planner Groups

This setup screen is used to assign territories to planner groups. Planner groups are a group of resources dedicated to planning and are setup in Resource Management. Territories consist of service representatives and are setup in Territory Management. Once this is setup this is the default group of territories that is shown to a planner group in the Control Tower.

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**Note:** When you have opened the Assign Territories to Planner Groups setup screen you are prompted to select a resource group. Choose the resource group that represents the planner group you want to assign territories to.

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### Options

Step	Option	Description
1.	Territories	Select a territory from the list of values you want to add to the planner group. You can add multiple territories to a planner group.

## Generate Shift Tasks

Generate Shift Tasks is a concurrent program used to create departure and arrival tasks for each service representative. The departure and arrival tasks are used by Scheduler to schedule tasks in between and calculate the travel time and distance in the complete trip. These departure and arrival tasks are created based on the shifts defined for each service representative in Calendar, and normally use the service representatives home address for departure and arrival location.

Run this program for a specific period or choose to run it every night. When running this program for a specific period the Scheduler profile option CSR: Plansope is used to determine the length of the period for which the tasks are created in days. When running this program every night the profile option determines how many days in advance the tasks are created.

### Prerequisites

Setup of shifts in Calendar.

### Steps

1. From the Navigator, choose **Setup**.

2. Open **Generate Shift Tasks**. The Parameters screen is opened.
3. Enter the **Start date of time frame** if you want to run the program for a specific period. Clear the **Start date of time frame** field if you want to run the program every night.
4. Click **Ok**. The Generate Shift Tasks setup screen is opened.
5. The Parameters field contains the entered start date of time frame or is empty when running the program every night.
6. Click **Languages** to change the language of the created tasks.
7. Click **Schedule**. The Schedule screen is opened.
8. Click **Apply a Saved Schedule** to use the settings of a previous saved schedule.
9. Choose one of the options at **Run the Job**.
10. Click **Help** for assistance.
11. Click **OK** when finished.
12. Click the **Options** button. The Upon Completion screen is opened.
13. Click **Help** for assistance.
14. Click **Submit** when you have finished.

## Resources Subinventories Assignment

The resources to subinventories assignment screen is used to connect resources to subinventories. For now resources will be service representatives, in future other type of resources might be available.

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**Note:** The first time this setup screen is opened you will be prompted to select the code that applies for your organization. Make sure you choose the right organization code because you will not be able to change this once you have selected it.

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### Options

Perform these steps in sequential order.

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**Note:** Updating a record results in the creation of a new record, re query to make the record visible. You cannot delete a record.

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Step	Option	Description
1.	Organization: Code	This field is populated with the code that was selected the first time the setup screen was opened.
2.	Organization: Name	The name of the organization will automatically be populated once the code of the organization is selected.
3.	Resource Type	Enter a resource type.
4.	Resource	Select a service representative.
5.	Subinventory	Select the subinventory you want to connect to the service representative. Press OK to save.
6.	Default	Select <b>IN</b> for good subinventory, <b>OUT</b> for bad subinventory and nothing for all other subinventories.
7.	Startdate	Select the date for the assigning to be effective.
8.	Enddate	Select the date for the assigning to end.

## Profile Options

The following profile options are unique to Field Service.

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**Note:** The profile options numbered 1 to 4 regarding task statuses have seeded values. There is no immediate need to set these up differently. When a new status flow is implemented these profile options need to be changed to match the change in state transitions.

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### Profile Options

You can set these options in any sequence.

	Option	Description
1.	CSF: Default New tasks status	Default status that is assigned to a new task.
2.	CSF: Default "In planning" task status	Default status that is assigned to tasks that are set to "In planning" in the Field Service Control Tower.
3.	CSF: Default Assigned task status	Default status that is assigned to tasks that are set to "Assigned" in the Field Service Control Tower.
4.	CSF: Default Cancelled tasks status	Default status that is assigned to tasks that are set to "Canceled" in the Field Service Control Tower.
5.	CSF: Database port to receive data	Enter the port number of the hosting database.
6.	CSF: Default travel distance for Time Distance Server	If no geocode exist for a task the value is used as the default travel distance between two tasks. <b>Note:</b> When a value is entered this is always used to indicate travel distance and overrules the capability to calculate it with the Time Distance Server.
7.	CSF: Default travel duration for Time Distance Server	If no geocode exist for a task the value is used as the default travel duration between two tasks. <b>Note:</b> When a value is entered this is always used to indicate travel duration and overrules the capability to calculate it with the Time Distance Server.
8.	CSF: Last used service area on the map	This value is set automatically to store the last used service area on the map.

	Option	Description
9.	CSF: Location Finder Installed	Value set to check if the location finder is installed. It is launched when a location for a task is missing, see profile option <a href="#">CSR: Create location</a> .
10.	CSF: Map Left Top X-coordinate	The top left x-coordinate of the shown area on the Field Service Map. This value is set automatically.
11.	CSF: Map Left Top Y-coordinate	The top left y-coordinate of the shown area on the Field Service Map. This value is set automatically.
12.	CSF: Map Right Bottom X-coordinate	The bottom right x-coordinate of the shown area on the Field Service Map. This value is set automatically.
13.	CSF: Map Right Bottom Y-coordinate	The bottom right y-coordinate of the shown area on the Field Service Map. This value is set automatically.
14.	CSF: Resource progress delay margin	Add a value for the period of time, minutes, a resource is allowed to be late in his trip before it is escalated. This affects the instant shown status of the resources on the Field Service Map.
15.	CSF: Selected territories	This value is set automatically to store the territories selected and show them to the planner when the control tower is started.
16.	CSF: Time distance server calculation factor	If the factor is set the Time Distance Server calculates travel distance and duration faster but less accurate.
17.	CSF: The unit of measure for hour	The setting of the unit of measure for hours must be entered and correspond with the MTL_UNITS_OF MEASURE. Default setting is HRS (hours).
18.	CSF: The unit of measure for minutes	The setting of the unit of measure for minutes must be entered and correspond with the MTL_UNITS_OF MEASURE. Default setting is MIN (minutes).

