

Oracle® Field Service

Concepts and Procedures

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Oracle Field Service Concepts and Procedures, Release 11i

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Contents

Send Us Your Comments v

Preface..... vii

1 Understanding Field Service

1.1	Introduction to the Field Service Suite	1-2
1.2	The Field Service Process	1-4
1.3	Overview of Field Service	1-8
1.4	How Field Service Relates to the E-Business Suite.....	1-10
1.5	The Scheduling and Task Assignment Process.....	1-15
1.6	What is the Field Service Dispatch Center?.....	1-22
1.7	What is Debrief?	1-26

2 Using Field Service Dispatch Center

2.1	Working with the Field Service Dispatch Center	2-1
2.2	Finding Tasks.....	2-3
2.3	Viewing Task Details	2-5
2.4	Selecting Territories	2-9
2.5	Managing Skills and Skill Levels	2-9
2.6	Assigning Skills to Tasks.....	2-11
2.7	Assigning Skills to Task Templates	2-13
2.8	Accessing Spares Management	2-14
2.9	Viewing Resource Addresses and Sub Inventories.....	2-14
2.10	Viewing the Parts Requirement of a Task	2-15
2.11	Working with the Plan Board.....	2-15
2.12	Working with the Gantt.....	2-17
2.13	Working with the Map	2-18
2.14	Scheduling Tasks.....	2-20
2.15	Scheduling a Task Manually.....	2-20

2.16	Scheduling Using the Unassisted Option	2-22
2.17	Scheduling Using the Assisted Option.....	2-22
2.18	Scheduling Using the Window to Promise Option	2-23
2.19	Scheduling Using the Intelligent Option	2-24
2.20	Scheduling a Task for Multiple Resources.....	2-25
2.21	Scheduling a Task or Tasks Automatically.....	2-26
2.22	Viewing Failed Autonomous Schedule Assignments.....	2-27
2.23	Optimizing a Service Representative's Trip	2-28
2.24	Recalculating a Service Representative's Trip.....	2-28
2.25	Recalculating All Trips	2-28
2.26	Canceling a Scheduled Task	2-29
2.27	Re-assigning a Scheduled Task	2-29
2.27.1	Re-assigning a Scheduled Task from the Gantt chart	2-30
2.27.2	Re-assigning a Scheduled Task from the Plan Board.....	2-30
2.28	Committing the Schedule	2-30
2.29	Reporting on Tasks.....	2-32
2.30	Viewing Service History	2-32
2.31	Viewing the Service Request Details	2-33

3 Using Debrief

3.1	Opening a Debrief	3-1
3.2	Viewing and Creating Notes.....	3-2
3.3	Accessing your Calendar.....	3-3
3.4	Entering Material.....	3-3
3.5	Entering Expenses	3-5
3.6	Entering Labor Time	3-6
3.7	Recording Counter Readings.....	3-7
3.8	Viewing Onhand Quantity.....	3-7
3.9	Viewing Parts Requirement	3-8
3.10	Viewing Service Request	3-8
3.11	Updating the Task Assignment Status	3-9

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Part No. B10208-01

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Preface

Audience for This Guide

Welcome to Release 11i of the Oracle Field Service Concepts and Procedures.

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

- The principles and customary practices of your business area.
- Oracle Field Service

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

- 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 understand and use Oracle Field Service.

- Chapter 1 provides an overview of the applications features, business processes, applications process, and use.
- Chapter 2 provides task based topics on how to use the Field Service Dispatch Center.

- Chapter 3 provides task based topics on how to use the Field Service Report.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

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

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). Online help patches are available on MetaLink.

Related Documentation

Oracle Field Service shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Field Service.

You can read the documents 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>.

Documents 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) available with this release of Oracle Field Service (and any other Oracle Applications products). 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.

Documents Related to This Product

Oracle Field Service Implementation Guide

This guide explains how to implement the Oracle Field Service application and set it up effectively across the E-Business suite. It includes information on setting user profiles, as well as profile options and concurrent processes.

Oracle CRM Foundation Concepts and Procedures

Oracle Field Service uses a lot of the modules from CRM Foundation. Refer to this guide for details on the usage of each module.

Oracle Scheduler Concepts and Procedures

When Oracle Scheduler is installed the usage is tightly integrated with the Field Service application. This guide explains the Scheduler processes and how it is integrated with Field Service.

Oracle Spares Management Concepts and Procedures

Use this guide to learn more about the Spares Management processes and usage. Especially when working with Scheduler as well, Field Service, Scheduler, and Spares Management are tightly integrated.

Oracle Field Service/Laptop Concepts and Procedures

This guide will help you to navigate the mobile client, the laptop device, and explains how to use the Field Service/Laptop application. Field Service information is send to the laptop device to be handled by the field service representative.

Oracle Field Service/Palm™ Devices Concepts and Procedures

This guide will help you to navigate the mobile client, the palm device, and explains how to use the Field Service/Palm™ Devices application. Field Service information is send to the palm device to be handled by the field service representative.

Oracle Field Service/Wireless Concepts and Procedures

This guide will help you to navigate the mobile client, the wireless device, and explains how to use the Field Service/Wireless application. Field Service information is send to the wireless device to be handled by the field service representative.

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, the Oracle8 technology stack, and the Oracle8*i* Server 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's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

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.

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 Alert 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. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they 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

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Field Service. This manual details additional steps and setup considerations for implementing Oracle Field Service with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Field Service with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Field Service.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Field Service implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual 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 Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

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

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Field Service and reach full productivity quickly. 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's 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 Field Service 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 Oracle8i server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With OracleMetaLink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

Alerts: You should check OracleMetaLink alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

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 Corporation 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.

Understanding Field Service

This topic group 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.

Topics covered are:

- [Introduction to the Field Service Suite](#)
- [The Field Service Process](#)
- [Overview of Field Service](#)
- [How Field Service Relates to the E-Business Suite](#)
- [The Scheduling and Task Assignment Process](#)
- [What is the Field Service Dispatch Center?](#)
- [What is Debrief?](#)

1.1 Introduction to the Field Service Suite

The Oracle Field Service suite supports an automated process used by service organizations to manage their field service operations. It assists in the entire service process from taking the customer call to fixing and reporting on the problem at a customer site.

The Field Service suite offers a range of products to meet your organization's business needs. The following table lists all the products in the suite.

Suite Product	Description
Customer Care	Customer Care is not really a product of the Field Service suite but the Service Request form is delivered with the Field Service application. The Service Request form takes the customer's call for service and creates a service request.
CRM Foundation	The products in CRM Foundation are essential to use Field Service. They are used to create tasks, territories, define resources, and help in the assignment of tasks to resources. CRM Foundation comes with Field Service.
Field Service	The Field Service application assists in assigning tasks to service representatives, creating and dispatching daily schedules, monitoring progress, and reporting on material, expense, and labor transactions.
Scheduler	Scheduler enables optimization of scheduling capabilities of tasks to qualified resources. It takes into account driving time, distance, and part availability, and it creates part reservations.
Spares Management	Spares Management is used to provide additional logistics and planning features to manage a service parts inventory in a multi-location environment.
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.
Field Service/Laptop	Field Service/Laptop is a remote application typically installed at a service representative's laptop to receive his daily schedule and report on progress, material, expense, and labor.
Field Service/Palm™ Devices	Field Service/Palm™ Devices is a remote application for a handheld device so a service representative can receive his daily schedule and report on progress, material, expense, and labor.

Suite Product	Description
Field Service/Wireless	Field Service/Wireless is a remote application for a WAP enabled device so a service representative can receive his daily schedule and report on progress, expense, and labor.

1.2 The Field Service Process

The entire field service process includes six major areas. The process is initiated by the creation of a field service request. To perform service out in the field, tasks are assigned to the service request. These tasks are assigned to service representatives. At the end, the service representative reports on the performed tasks and an invoice is created. This process is driven by service request status and task status changes.

The following topics are reviewed in more detail:

- [The Field Service Business Process](#)
- [How this Process Relates to the E-Business Suite](#)

The Field Service Business Process

The steps in the field service process are described in the table below.

Step	Description
1. Field Service Request intake & validation	There are several ways to report a request for service. The customer can create the request by using the Web, using Computer Telephone Integration (CTI), using e-mail, or by dialing into a call center where an agent takes the call. A field service request can also be created by a service representative, through a project, or by a sales order (installation of a product). When the request is received, the customer, product, and contract are checked in the validation step.
2. Field Service Request screening & qualification	After a service request is created, it is screened to avoid a field visit. The service request is analyzed by a support agent who searches the knowledge base for a solution. As an outcome of this process, the request may be closed, a part may be shipped to the customer, or the customer might ship the part for in-house repair. When a field visit is required, a task is created based on the problem description and action needed to resolve the problem. A definition for the parts necessary to resolve the task is also given. The creation of a task for installation or maintenance of customer product can be created automatically from a service contract or sales order.
3. Field Service Request planning and dispatch	The tasks must be scheduled, assigned, and dispatched to the service representatives. The scheduling of the tasks is done based on various constraints such as skills, location, availability, and required parts. When the tasks assignment is done the task or schedule is dispatched to the service representatives. The service representative receives notification and progress on the task is monitored.

Step	Description
4. Field Service Request delivery and reporting	Upon receipt of an assigned task or schedule, the service representative delivers the service at the customer's site. He reports on progress, materials used, materials recovered, expenses made, and time spent. Additionally he can record a counter reading or provide information about how the problem has been resolved. It might be necessary to create new tasks or service requests if he can't help the customer immediately. He can recover the product or part of the product for repair and assign it an RMA (Return Material Authorization) to track the customer product. All the reported information is used for billing the customer. Reporting on materials used also results in auto replenishment of the service representative's car stock.
5. Field Service Request monitoring	Things can happen any time during the process that endanger the execution of a field visit or task assignment. Escalations are raised to act accordingly.
6. Field Service Request completion and billing	When the service representative is completely done with the task he marks the status as complete and moves on to the next task. The information is checked by an agent in the office for any service contract coverage and an invoice is created. Inventories, subinventories, and installed base are updated.

Note: Depending on your organization these steps can be separated or combined.

How this Process Relates to the E-Business Applications Suite

This section shows how this process relates to the E-Business Applications suite of products. The following table lists the possibilities for a field service solution based upon the process above.

Step	Application
1. Field Service Request intake and validation	<p>Oracle iSupport</p> <p>A service request can be initiated by the customer or by an agent through the web.</p> <p>Oracle Sales</p> <p>A service request and task can be initiated from a sales order.</p> <p>Customer Care</p> <p>A service request can be initiated by an agent from the Contact Center.</p> <p>Oracle Service Contracts</p> <p>A service request and task for maintenance can be initiated by a contract when set up correctly.</p> <p>For each service request:</p> <ul style="list-style-type: none">■ Write down the customer information.■ Use Product Coverage to validate any contract coverage for service.
2. Field Service Request screening and qualification	<p>Customer Care</p> <p>Service Request form</p> <ul style="list-style-type: none">■ Analyze the problem.■ When a field visit is required, take down the address where the product is to locate the product at the customers site.■ Create tasks to perform the visit. Define the field service task type, define when a service representative is supposed to arrive at the customers site at Planned Start and End date. Define how much effort the task takes for completion, for example, 1 hour, half a day, or 1 day.

Step	Application
3. Field Service Request planning and dispatch	<p>Field Service</p> <p>Use the Dispatch Center to schedule and dispatch tasks.</p> <p>Scheduler</p> <p>Call upon the Scheduling Advice window from the dispatch center to optimize your scheduling capabilities.</p> <p>Spares Management</p> <p>Access the Spares Management application to order spare parts. When Scheduler is installed this is done automatically at task assignment.</p>
4. Field Service Request delivery and reporting	<p>Field Service/Laptop</p> <p>The schedule is received by the service representative on his mobile device. He records counter readings and reports on material used, time spent, and expenses made.</p> <p>Field Service/Palm™ Devices</p> <p>The schedule is received by the service representative on his mobile device. He records counter readings and reports on material used, time spent, and expenses made.</p> <p>Field Service/Wireless</p> <p>The schedule is received by the service representative on his mobile device. He reports on time spent, and expenses made.</p> <p>Depot Repair</p> <p>To create an RMA for a recovered product</p> <p>Field Service</p> <p>All information is received back from the mobile devices and consolidated in Debrief. This information is then updated to Inventory, Installed Base, and Charges.</p>
5. Field Service Request completion and billing	<p>Customer Care</p> <p>From Charges updates are made to create an invoice for billable expenses.</p>

1.3 Overview of Field Service

Field Service is an essential part of the Field Service Application Suite. At the core of Field Service is the Dispatch Center which allows the field service dispatcher to plan, dispatch, and monitor all field service activities. This ultimately ensures that the right person is in the right place at the right time with the right parts. The Field Service Report enables you to report all activities performed out in the field.

Review the following to learn more about the Field Service application:

- [Field Service Dispatch Center features](#)
- [Field Service Report features](#)

Field Service Dispatch Center Features

These are the features of the Field Service Dispatch Center:

- Shows information for a selected task such as a related service request, escalations, parts transactions, installed base related information, resources assigned for a task, and customer address information.
- Schedules and assigns tasks, either automatically or manually, to one or more service representatives. The automatic process of scheduling tasks can be run as a background process.

Task assignment is assisted by the use of the Assignment Manager.

When Oracle Scheduler is installed, you can optimize your scheduling capabilities. Driving time and distance for the service representative is provided, and parts reservations are made. For more information, see [Overview of Scheduler](#).

- Manages parts information. Locating, ordering, and monitoring parts for specific tasks.

If Oracle Scheduler is installed, locating parts and creating reservations is done automatically.

- Commits tasks and daily schedules to service representatives, either automatically or manually. When parts reservation are created, this process initiates an order for the parts.

The tasks or daily schedules are sent to the service representative's mobile application with information about the task, related service request, problem and resolution, customer address information, installed base information when applicable, and counters.

- Monitors schedules, activities, and progress, of service representatives.
Use different grids to visualize the planning such as a daily view, view over a period of time (user definable), or a geographical representation.
Escalation notifications give you the ability to react to non-conforming tasks. A task becomes non-conforming when parts are no longer available, for example, or when contract response times cannot be met.
- Makes a selection of tasks based on characteristics such as ready to be planned, planned for today, or escalated.
- Views service history for a customer or a product.

Field Service Report Features

These are the features of Debrief:

- Reports on parts, expenses, and labor for a task. This ultimately results in updates to Inventory, Installed Base, and Charges.
- Reports on Counters. From Field Service Report you can easily access the Capture Counter Reading functionality from Oracle Service to capture counter readings.
- Offers direct access to specific Spares Management functionality such as View Move Order, Create Move Order, and View Onhand Quantity.
- Offers direct access to Notes, Calendar, or Interaction History.

- Contracts, including both Contracts Core or Service Contracts. Input for the service request is the response time, considered for task assignment.
- TCA provides information on parties and contacts and their information.
- Installed Base provides input on the installed base information sent to the Mobile applications. Used by the service representative when servicing the product.
- Inventory provides input to determine what products are serviceable.
- Task Manager functionality is used to create tasks to perform the field visit.

Resource Manager

All service representatives and field service dispatchers need to be defined individually in the resource manager. Field service dispatchers are also part of a dispatcher group created in Resource Manager to be able to access the Field Service Dispatch Center.

Territory Manager

Territory Manager is used for two purposes.

- It is used to create territories with service representatives assigned to it. These territories are then related to a dispatcher group. The service representatives assigned to the territory show up in the Field Service Dispatch Center for the dispatcher.
- It is also used to create territory qualifiers for task assignment. These territory qualifiers are used by the Assignment Manager and Scheduler to retrieve a qualified service representative for a task.

Calendar

Working hours, shifts, and non-available working hours such as public holidays need to be defined for each service representative. This information is used for scheduling. A service representative can also access his calendar and view his task assignments.

Assignment Manager

The Assignment Manager assists in the task assignment from the Field Service Dispatch Center by finding a qualified service representative to resolve the task. The following applications have an indirect relationship with Field Service:

- **Installed Base**—A preferred service representative to perform the field visit can be recommended from the installed base.
- **Contracts**—A preferred service representative to perform the field visit can be recommended from Contracts, or Contracts Service.
- **Territory Manager**—Territories with qualifiers are created to filter qualified service representatives.
- **Calendar**—the availability of the service representative is checked in his or her calendar.

Scheduler

Scheduler assists in task scheduling from the Field Service Dispatch Center by finding a qualified service representative to resolve the task with the right part. Scheduler uses the input from the Assignment Manager and applies its own functionality. It takes into account driving time and distance, part availability and creates part reservations. Scheduler is tightly integrated with Spares Management.

Spares Management

Usually you need parts to resolve a problem at the customers site. You can access Spares Management manually to order parts for a task. If Scheduler is installed, a reservation for the part is created automatically at task assignment. When the task is committed, an order for the part is created. You can update Spares Management indirectly from Debrief with parts usage for a task. The update is done to maintain stock levels at different locations, the subinventories.

Escalation Management

Escalations occur for a wide variety of reasons. An escalation management system allows an organization to identify, track, monitor, and manage situations that require increased awareness and swift action. Field Service summarizes and shows escalations for tasks that need to be or are scheduled.

Field Service Mobile

After task assignment, the schedule is committed and sent to one of the following mobile applications:

- Field Service/Laptop
- Field Service/Palm™ Devices
- Field Service/Wireless

It is received by the service representative, who can update the schedule and create a service report. The data is received back by Field Service to monitor progress and captured on Debrief.

Inventory

Inventory provides input for Service Request to determine which product needs service. You can update Inventory (Spares Management) from Debrief with parts usage for a task. Updating Inventory is done to maintain stock levels at different locations and subinventories. A subinventory could be a warehouse or a service representative's vehicle. Updating inventory results in activities to supply these warehouses or a service representative with new materials or to retrieve materials from them.

You cannot modify reported information in Debrief once it has been transmitted successfully to Inventory.

Installed Base

Installed Base provides input for the service request to indicate if it is an installed base item. It also provides input to the Assignment Manager as to which service representatives are preferred to perform the field visit.

You can update a customer's Installed Base from Debrief. Updating Installed Base results in an update of the items of the customer's Installed Base.

You cannot modify reported information in Debrief once it has been transmitted successfully to Installed Base.

Notes

Notes provide a text area where you can enter information about a customer, product, service, or anything related to your service report that may be helpful for other service representatives or customers. After you create a note, it can be attached to a task, sent to the customer, or submitted to the knowledge base for reuse. You can access Notes from Debrief.

Charges

You can update Charges with parts usage, counter information, labor time, and expenses for a task. All information recorded is transmitted to the Charges database on Update. In Charges, this information is checked against any contracts and a final invoice is generated.

You cannot modify reported information in Debrief after it has been transmitted successfully to Charges.

1.5 The Scheduling and Task Assignment Process

Task scheduling or task assignment is the core functionality of the Field Service application. Task assignment in Field Service is assisted by the Assignment Manager. Scheduler functionality is used for enhanced task scheduling. The task assignment process uses criteria based on preferred resources, resource availability, skills, and territories to select a qualified resource for a task. If Scheduler is installed, you can optimize your scheduling capabilities with a set of business-driven weighting criteria defined at implementation, and calculate travel time and distance in between tasks. With Scheduler installed you can also create reservations for spare parts when scheduling tasks.

There are four options presented to you for scheduling and task assignment. If Scheduler is not installed only two options for task assignment are active.

Tasks change status during the field service process of scheduling or assigning tasks. Depending on the current status, different subsequent actions (or transitions) and statuses are possible. Task statuses and task assignment statuses are shown in the Dispatch Center, and enable the dispatcher to keep track of progress. The task status flow is specific to the Field Service application and is therefore explained in more detail.

Review the following topics to understand more about the scheduling and task assignment process:

- [Scheduling versus Task Assignment](#)
- [Scheduling and Task Assignment Dependencies](#)
- [Scheduling and Task Assignment Criteria](#)
- [Scheduling and Task Assignment Options](#)
- [Task Status Flow](#)

Scheduling versus Task Assignment

Scheduling and task assignment are two different things. When scheduling, your goal is to create a trip for each service representative within a working day consisting of the most logical sequence of tasks and load. It is thus important to be able to calculate travel time and distance between tasks, and to be able to recalculate a schedule to optimize the sequence of tasks in a trip. These are features specific to scheduling. For task assignment, the application does not consider the sequence of tasks already scheduled or the definition of a service representative's working hours (shifts). It assigns a task to a resource based on a very small set of criteria. In

addition, when scheduling, spare part availability is considered and reservations for parts are created. Scheduling is recommended over task assignment.

Scheduling and Task Assignment Dependencies

The task assignment and scheduling processes use criteria based on preferred resources, resource availability, skills, territories, parts availability, and travel time and distance to select a qualified resource for a task. There are a few dependencies task assignment and task scheduling rely on. The following table lists the dependencies.

Dependency	Description
Preferred resource information	A preferred resource is a single person or a resource group that is defined in Oracle Contracts or recommended from the Installed Base in Oracle Service.
Skill	Skills are the field service representative's competencies. Skills fall into 3 major categories: technical product skills, other technical skills, and non-technical skills, for example specific knowledge of a certain language. When scheduling each task, Advanced Scheduler matches the field service representatives' skills to the skills required to perform the task
Skill level	The skill level indicates the expertise scale of the field service representative's skill.
Territory definition	Territories are defined in Territory Manager. For more information, refer to Territory Manager.
Task duration information	Task duration is essential for checking the availability of the resource and for designating a resource as unavailable in the resources calendar after a task has been assigned. Task duration information is the amount of Effort defined at creation of the task.
Resource's availability information	Availability of the resource is provided by the Calendar component in which resource shifts and unavailability are defined. For more information, refer to Understanding Calendar.
Spare parts location and availability	Spare part location and availability information is a dependency for Scheduler to make a reservation at task assignment. Spare part information is provided by Spares Management.
Road network for calculation of travel time and distance	A road network is a dependency for Scheduler to be able to calculate travel time and distance in between tasks.

Scheduling and Task Assignment Criteria

There is a difference in how Assignment Manager and Scheduler consider selection criteria to retrieve a qualified resource for a task. When you schedule manually, you can also influence how the selection criteria are applied. When you schedule automatically (Scheduler functionality) an assumption is made on how selection criteria are applied. You can start automatic scheduling manually or you can run it as a background process, called autonomous scheduling.

Review the following table to learn about the differences and how the criteria are used to select a qualified resource for a task:

Criteria	Assignment Manager	Scheduler	Automatic and Autonomous Scheduling
Territory Qualifiers	Used to retrieve all the qualified resources for the assignment from the selected territories.	Used to retrieve all the qualified resources for the assignment from the selected territories.	Used to retrieve all the qualified resources for the assignment from all territories defined.
Contracts	When selected, this is the first resource criteria considered.	When selected, this is the first resource criteria considered.	Selected as the first criteria considered.
Installed Base	When selected, this is the first resource criteria considered.	When selected, this is the first resource criteria considered.	Not used.
Skills	Not used.	Matched are the field service representative's skills to the skills required to perform the task.	Matched are the field service representative's skills to the skills required to perform the task.
Resource Available	When a resource is found based on the criteria above, its availability is considered.	Scheduler always considers the availability of the resource.	The availability of the resource is always considered.
My Suggestion	When entered, the suggestion is always returned as a plan option.	When entered, the suggestion is always returned as a plan option.	Not used.

Criteria	Assignment Manager	Scheduler	Automatic and Autonomous Scheduling
Spares (Scheduler functionality)	Not used.	A list of qualified resources based on the criteria above is passed on to Spares Management, which checks parts availability based on the availability condition selected.	A list of the qualified resources based on the criteria above is passed on to Spares Management, which checks parts availability based on a predefined availability condition.
Travel time and distance (Scheduler functionality applied automatically)	Not used.	The travel time and distance for each plan option are calculated for the resources returned from the Assignment Manager (when no parts are used) or Spares Management.	The travel time and distance for each plan option are calculated for the resources returned from the Assignment Manager (when no parts are used) or Spares Management.
Cost Related Constraints (Scheduler functionality applied automatically)	Not used.	Scheduler applies pre-defined business driven constraints for each plan option to produce a list with qualified resources or available time slots.	Scheduler applies pre-defined business driven constraints for each plan option to produce a list with qualified resources.

Scheduling and Task Assignment Options

When you schedule manually, there are four options presented to you for scheduling or task assignment. This is also referred to as assistance level. The options presented to you depend on whether Scheduler is installed or not.

Refer to the following table to learn more about the options for scheduling manually:

Assistance Level	Description
Unassisted	Use this option to assign a task to a service representative of your choice without taking into account any of the criteria.

Assistance Level	Description
Assisted	Use this option if you want Assignment Manager to find qualified resources. A list of resources is displayed in the Advice tab.
Window to Promise	This option is specific to Scheduler. Use this option if you want Scheduler to find available time slots. The Advice tab displays time slots at which a resource can visit the customer to perform the task with related cost. These time slots are offered to the customer and after selection the Planned Start and End date is set accordingly. The schedule can be optimized at a later stage.
Intelligent	This option is specific to Scheduler. Use this option if you want Scheduler to find qualified resources. The Advice tab displays the resources and their related cost. Typically the resource with the lowest cost is the best option.

Task Status Flow

The scheduling and task assignment process is driven by task status changes specific to Field Service. When a task enters the Dispatch Center it has the status it was given at creation and it is suitable for scheduling. When the task is assigned to a resource, a task assignment is created. A task assignment consists of a resource and a related task. One task can have multiple task assignments if multiple resources are assigned to the task. After task assignment you can still optimize your schedule up until the moment the schedule is committed. When the schedule is committed, tasks change status, and the task assignments are sent to the service representatives. Service representatives report on the task assignment status. The task assignment status is displayed in the Resources tab to monitor progress. The task status is displayed on the plan board, gantt, and across all tabs in the upper region of the Dispatch Center.

The following table lists all seeded task statuses, their behavior, and possible statuses to change to. When each task assignment for a task is completed, the task status will change to completed.

Table 1 Seeded Tasks Statuses

Task Status	Task Assignment Status	Behavior	Following Possible Statuses
In Planning	In Planning	The task is ready for planning or already assigned to a service representative. The planner is still optimizing the schedule and can still assign the task to another service representative.	Assigned/ Auto Reject/ Cancelled
Auto Reject		When scheduling automatically, a task assignment can fail. The task status is set to auto reject.	In Planning/ Cancelled
Assigned	Assigned	The task is assigned to a service representative and the schedule is committed.	Accepted/ Rejected/ Working/ Completed Cancelled
	Accepted	The task is accepted by the service representative. Reporting on the task is possible.	Reject/ Working/ Interrupted/ Cancelled
	Rejected	The task is rejected by the service representative. The dispatcher can change it back to Assigned to force the service representative to accept it, or change it to In Planning to assign it to another service representative. Reporting on the task is possible.	In Planning/ Assigned/ Accepted/ Working/ Cancelled
	Working	The service representative has started working on the task. The actual start time is entered, enabling the dispatcher to view progress on the schedule and to view the predicted start times of the tasks scheduled next. Reporting on the task is possible.	Interrupted/ Completed/ Cancelled
	Interrupted	The work on a task has stopped. The dispatcher can assign it to another service representative, changing the status to In Planning, or assign it to the same service representative later. The service representative can also continue working on the task. Reporting on the task is possible.	In Planning/ Assigned/ Working/ Completed/ Cancelled

Task Status	Task Assignment Status	Behavior	Following Possible Statuses
Cancelled	Cancelled	The task is cancelled. The dispatcher can assign it to the same representative again by changing the task status to Assigned, or he can change the status to In Planning to assign it to another service representative. Reporting on the task is possible.	In Planning/ Assigned/ Closed
Completed	Completed	The task is done and frozen. No updates or reporting on the task is allowed anymore.	Closed
Closed		The Debrief for the task is reviewed and pushed to charges. Updates to the installed base and knowledge base are made.	None

1.6 What is the Field Service Dispatch Center?

The Field Service Dispatch Center is a one-stop planning area where you can schedule, dispatch, and monitor tasks for service representatives out in the field. A dispatcher can view all incoming tasks and then schedule these tasks to create a trip for each service representative. A trip includes all tasks for one service representative within a working day. A trip consists of a start time and location, which is defined as a departure task, and an end time and location, which is defined as an arrival task. All tasks are scheduled between the departure and arrival tasks. In addition to scheduling tasks, the Dispatch Center allows you to act on escalations and monitor the service representative's progress and schedules using the plan board and gantt. You can also make last minute changes to schedules and view your service group's status and location on the map.

The following topics are reviewed in more detail:

- [What Tasks and Resources Do I See?](#)
- [Navigating in the Dispatch Center](#)

What Tasks and Resources Do I See?

This topic describes the tasks that are available to you and the resources you see when you enter the Dispatch Center.

When Field Service is implemented, you define which resources are shown by default. You create dispatcher groups of which you are a member (mandatory) and you create territories with service representatives assigned to them. You establish a relation between the dispatcher groups and the territories. These are the service representatives shown to you in the Dispatch Center on the plan board, gantt, and map. This feature is mainly meant for monitoring purposes. A large organization usually monitors a group of service representatives and not all of them. However, you can always choose to view all territories or a selection of territories using the corresponding option on the Navigate menu.

By default, all tasks that can be scheduled are available to you and could be offered to you for scheduling. You can narrow down the task selection by choosing an appropriate query from the Tasks list or by defining your own query. You can also choose to see only the tasks that you are allowed to schedule. You were defined as owner of these tasks at setup. For the tasks that you can schedule, it's possible that the most eligible service representative is not one of the service representatives you monitor. Even so, he or she is presented to you as the best option.

Navigating in the Dispatch Center

In the Tasks list in the left region of the Dispatch Center window, you can view tasks by selecting from the list of values. You can also use the flashlight icon to define your own query to find tasks. When you move your cursor over a task from the task list, details are displayed in the upper region of the Dispatch Center. Bold print indicates that a task is ready for planning. To select a task for planning you need to check it.

In the upper region of the Dispatch Center you can view Task Details. All tabs display the task number, status, response time, and planned effort, defined at task creation.

The following information is displayed in more detail in the various tabs:

- **Overview:** This shows task description, customer information, task urgency, planned start and end dates (the date when a service representative is supposed to arrive at a customer site), and scheduled start and end date (the date when a service representative actually visits the customer). If parts are necessary to resolve the task, this is indicated.
- **Service Request:** This shows the service request number, date service was requested, a summary, and problem and resolution description. Select and right click the Request field to bring up a pop-up menu to access the source document.
- **Escalations:** If for some reason a task becomes non-conforming, escalation notifications show the reason. This tab shows a summary of escalations.
- **Spares:** The reserved parts are shown as well as the status for a task that has already been scheduled. You can access the Spares Management application for the task selected to view more detail.
- **Product:** This shows customer product description, serial number and lot number. Contract type, contract description, and product revision. If it is an installed base product, this is indicated.
- **Resources:** This shows the service representatives assigned to the task, as well as their status and travel time from the previous location to the selected task.
- **Address:** The address to visit is shown. This is also known as the installed at address.

In the lower region of the Dispatch Center you can monitor and schedule tasks for a group of service representatives on the plan board, gantt, and map. By default, you see the group of service representatives defined at setup as described in the previous section. You can choose to view other groups of service representatives

from the Navigate Menu on the tool bar. Choose Select Territories to show the territories with service representatives assigned to them on the plan board, gantt, and map.

How to use the plan board, gantt, and map:

- **Plan Board:** The plan board contains a grid populated with the service representative's name and his trip. A trip consists of departure and arrival tasks, and scheduled tasks for the day. Today's date is shown but you can select any date you like. Select and right click the service representative's name to view resource details or optimize his trip (sequence of tasks). Select and right click one of the tasks to show the source document, start a Debrief, or send a message. Select and right click an empty cell in the service representative trip to assign a task.
- **Gantt:** The gantt chart view is a graphical overview of the scheduled tasks based on time. The date range shown by default is two days before the actual date and two weeks ahead of it. The date range is adjustable. The gantt shows you a service representative's shift, his assigned tasks and the travel time between tasks (if Scheduler is installed). Put your cursor on a task to see task details. Select and right click a task to access the source document.
- **Map:** The map is a geographical overview of a service representative's real time location and status. The date shown for the map is the actual date. You can also get an overview of tasks with their location, by first selecting and checking them in the task list and then clicking the Tasks button on the map. From the map you can easily assign tasks and access source document details. Select and right click a service representative or task to access source document details. When a task is checked from the task list, double click a service representative to start task assignment.

The buttons at the bottom of the screen enable you to do the following:

- **Auto Schedule:** Before using this button, check a task or multiple tasks from the task list. It automatically schedules tasks to resources using the selection criteria from either the Assignment Manager or Scheduler (if installed). For more information on scheduling criteria, refer to [The Scheduling and Task Assignment Process](#).
- **Advise:** Before using this button, check a task from the task list. The Scheduling Advice window opens to assist you in assigning a task to a resource using selection criteria from either the Assignment Manager or Scheduler. For more information on scheduling criteria, refer to [The Scheduling and Task Assignment Process](#).

- **Go to:** Click in combination with the plan board, gantt, or map. You can search for a particular resource to be presented on the plan board, gantt, or map.
- **Refresh:** Click to refresh the plan board, gantt, or map.
- **More:** Click to enlarge the plan board, gantt, or map.

Use the Navigate menu from the tool bar to access the Commit Schedule window to manually commit tasks or schedules to service representatives. This can also be done automatically if you set it up at implementation. Use the Navigate menu to navigate to the service request or spares management application populated with the details for the task selected from the task list. You can also use it to populate the plan board, gantt, or map with territories of service representative other than the ones shown to you.

1.7 What is Debrief?

Debrief documents information related to a specific task performed at a customer site. Use Debrief to record all the day-to-day activities out in the field. This includes parts used and recovered, expenses made, amount of labor time spent, and counter readings. After the information is collected and captured on the screen, you can update the customer's installed base, maintain your spares inventory, and update charges information.

When all the information has been captured on one of the Field Service/Mobile applications, it is uploaded and displayed in Debrief. There it can be used for review and to update the customer's installed base, spares inventory, and charges information.

The upper half of Debrief is populated with task assignment details. You can change the task assignment status to reflect the current status.

The main features in Debrief are:

- [Reporting on Materials](#)
- [Reporting on Expenses](#)
- [Reporting on Labor](#)
- [Reporting on Counters](#)
- [Integration with Spares Management](#)
- [Quick Menu](#)

Reporting on Materials

The Materials tab records and updates all material transactions performed while at work at the customer site. These transactions include parts usage and recovery and Installed Base updates.

Initially one item is associated with a service request. This can be an item from a customer's installed base or an item from the Inventory list. One or more tasks are created for this service request and you can create a Debrief for each task. If multiple resources are assigned to a task, you can create multiple Debriefs for a task. You can report several material transactions in Debrief. For each material transaction a separate line is created. This line includes information about the following:

- For parts recovered from the customer site or taken out of an Installed Base, the information shows in which subinventory it is stored, the reason for taking it out or recovering it, and what needs to be done with it.

- For parts used or put in an Installed Base at the customer's site, the information shows what part has been put in or used, from which subinventory, the quantity (for Installed Base items this would be one), and the reason why it was used. An Installed Base-related material transaction automatically results in a parts used transaction to update Inventory.

Based on the material transaction type you have chosen, you must fill out a set of mandatory fields in Debrief. Additionally you can capture specific material information such as serial numbers or lot numbers when applicable. When dealing with a material transaction such as a replacement for a customer's Installed Base you need to carefully define what part you have taken out of the customer's Installed Base and what part you are putting back in. This is done at two material transaction detail lines.

When finished, you update Inventory, Installed Base, and Charges for the material transaction lines created. The Inventory update results in activities to maintain the level of materials in the subinventories. For example, it maintains a warehouse or a service representative's car by supplying them with new materials or by retrieving materials from them. The Installed Base update results in an update of the items in the customer's Installed Base. The Charges updates results in checking what material is covered by contract and what needs to be invoiced to the customer.

Reporting on Expenses

On the Expenses tab you can document expenses accrued during your visit. For each expense transaction a separate line is created in Debrief. You can select a predefined expense item with a related cost or to enter the actual costs made. This can include expenses such as driving costs, parking tickets, and meals.

You update Charges for the expense transaction lines that were created to make sure these costs are covered by contract or need to be invoiced to the customer.

Reporting on Labor

On the Report tab you can report labor time. You can also record your car mileage for reference. For each labor transaction, a separate line is created in Debrief. Select a predefined labor item to report on.

Update Charges for the labor transaction lines that were created to make sure these costs are covered by contract or need to be invoiced to the customer.

Reporting on Counters

There is a Counters button in Debrief at the bottom of the main window. This button is enabled only if the product being serviced has an attached counter in the Installed Base.

When you select the Counters button, the Counters window is opened. This window displays in a spread table all of the counters that are set up for that customer product. Double clicking a line from that spread table opens the Capture Counter Reading window.

Integration with Spares Management

From the Tools menu on the tool bar of the Debrief main window, the following Spares Management functions can be started and populated with information regarding the service request or task:

- View Onhand Quantity: Used to review onhand balances for the Item at the subinventory level.

For details regarding Spares Management, refer to the *Spares Management Concepts and Procedures*, Understanding Spares Management.

Quick Menu

Use Quick Menu, available on your tool bar, to navigate to the following applications and windows:

- Installed Base
- Service Request
- Spares Management

The applications are populated with the task or service request information for which you have opened a Debrief.

Using Field Service Dispatch Center

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Please refer to [Working with the Field Service Dispatch Center](#) for more information.

2.1 Working with the Field Service Dispatch Center

The Field Service Dispatch Center assists you to schedule tasks and monitor the schedules for service representatives.

Choose one of the following topics to guide you through the application:

- [Finding Tasks](#)

You need to populate the Dispatch Center with tasks. Use this procedure to learn different ways to populate the Dispatch Center with tasks.
- [Viewing Task Details](#)

Different tabs are available that give you a good overview on all the information related to a task. Use this procedure to learn about all the tabs.
- [Selecting Territories](#)

The Dispatch Center is populated with a group of service representatives that show up on the plan board, gantt, and map. Use this procedure to learn how to populate the Dispatch Center with a different group of service representatives.
- [Assigning Skills to Resources](#) or [Assigning Skills to Tasks](#) or [Task Templates](#)

A resource, service representative, or a task require certain competencies, skills, to resolve the task. Use either of these procedures to define the skills for either the service representative or task.

- [Accessing Spares Management](#) or [Viewing the Parts Requirement of a Task](#) or [Viewing Resource Address and Sub-inventories](#)

Use either of these procedures for parts related matters.

- [Working with the Plan Board](#)

The plan board provides information on service representative schedules in a daily view. From the plan board you can start a Debrief, assign a task, send a message, access the source document, recalculate a trip, and get resource details. Use this procedure to learn how to use the plan board.

- [Working with the Gantt](#)

The gantt provides information on service representative schedules for a period of time. The gantt allows for task reassignment. Use this procedure to learn how to use the gantt.

- [Working with the Map](#)

The map provides a geographic visualization on service representative schedules for the current date. The map gives you the opportunity to display tasks and their location and allows for task assignment. Use this procedure to learn how to use the map.

- [Scheduling Tasks](#)

There are several ways and options to assign, or schedule, tasks to service representatives. After task assignment you can also optimize a service representative's trip, re-assign a task, or cancel a scheduled task. Use this procedure to learn how to schedule tasks, cancel tasks, recalculate a trip, or reassign a task.

- [Committing the Schedule](#)

After task assignment you need to commit the schedule so that it is sent to the service representatives. Use this procedure to learn how to commit the schedule.

- [Reporting on Tasks](#)

Use this procedure to learn how to access Debrief to open or create a Debrief.

- [Viewing Service History](#)

You can view the service history for a customer site or a product. Use this procedure to learn how to view service history.

2.2 Finding Tasks

Use this procedure to populate the Tasks list in the Dispatch Center with tasks. Once you have populated the Dispatch Center with tasks, you can assign them or review them. Tasks that are shown in bold can be scheduled.

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Make a selection from the View By list of values in the Tasks list to use a predefined query to search for tasks. By default the following queries have already been created with the following values:

Query Name	Description	Query Definition
Inbox	All tasks that can be scheduled, entered today, and haven't been assigned yet.	creation_date > trunc(sysdate) and scheduled_start_date is null and nvl(status_schedulable_flag,'N') = 'Y' and nvl(type_schedulable_flag,'N') = 'Y'
All Open	All tasks that are available for planning and can be scheduled.	nvl(status_schedulable_flag,'N') = "Y" and nvl(type_schedulable_flag,'N') = "Y" and not exists (select "" from csf_ct_task_assignments where task_id = csf_ct_tasks.task_id)
Auto Rejected	All tasks that are rejected by the Autonomous Scheduler.	task_status_id = 27
Assigned	All task that are already assigned.	task_status = assigned
Non-Schedulable	All tasks that cannot be scheduled.	tasks with schedulable_flags = "N"
Auto Scheduling	All tasks that can be scheduled by the Autonomous Scheduler.	Task_status = Auto in planning

3. To find tasks that do not conform to one of the predefined queries, click the flashlight icon on the tool bar. The Find Tasks window is opened.

4. Enter information to retrieve the kind of tasks you want to view. You can create a query based on a combination of the following search criteria:
 - a specific task or service request number
 - a specific service request or task specifications
 - tasks that you are the owner of
 - tasks that are assigned to you
 - tasks for a specific customer
 - tasks that need to be scheduled
 - tasks that have been scheduled
 - tasks that have been started for a selected date or date range
5. Click **Find**. The Tasks list of the Dispatch Center is populated with tasks matching the query definition.
6. To add your query to the list of values from the Tasks list, choose **Save Query As** from the Tools menu on the tool bar. The Save Query As window is opened.
7. Enter a Name for the query, this name is returned in the list of values in the Dispatch Center. Enter a Description for the query and an Active Start and End Date.
8. Click **OK**. The query is added to the list of values when selecting View By from the Tasks region.
9. To edit the query choose **Edit Query** from the Tools menu on the tool bar. The Edit Query window is opened. You can modify the information but you cannot delete a query. When the Active End date is reached the query disappears from the list of values that you see when you select View By from the Tasks region.
10. Right clicking a task in the Tasks list brings up a popup menu:
 - a. Click **Show Service Request** to show the window of the Service Request the task belongs to.
 - b. Click **Parts Requirement** to show the window of the required parts of the task. It is possible to add part requirements when these are not yet there.
 - c. Click **Schedule Advise** to assign the task. The Scheduling Advice window is opened. This option will not be accessible when the task is not schedulable. Please note that it is not necessary to also select the task (by checking the checkbox).

2.3 Viewing Task Details

The upper region from the Dispatch Center provides you with detailed information for a selected task from the Tasks list.

Use this procedure to learn about the details displayed in the following tabs:

- Overview
- Service Request
- Escalations
- Spares
- Product
- Resources
- Address
- Contacts
- Required Skills

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Populate the Tasks list with [tasks](#).
3. Select a task from the Tasks list.
4. Choose one of the following tabs:
 - [Overview](#)
 - [Service Request](#)
 - [Escalations](#)
 - [Spares](#)
 - [Product](#)
 - [Resources](#)
 - [Address](#)

- [Contacts](#)
- [Required Skills](#)

Overview tab

The Overview tab displays the task details as described in the following table.

Field	Description
Number	Task number, generated at creation of the task.
Status	Task Status.
Effort	When a task is created, the amount of time it takes to perform the task is estimated.
Name	A description of the task is given.
Respond By	Response time agreed upon with the customer either by contract or other means of communication. If the response time is not met, the task becomes non-conforming and an escalation notification is created.
Priority	The urgency given to the task.
Type	Task type definition. (For tasks that can be scheduled, the task type rule must be Dispatch. This is defined at implementation)
Parts	Indicates if spare parts need to be ordered, when Scheduler is installed this is done at task assignment.
Customer	Customer's name.
Telephone	Customer's telephone number.
Fax	Customer's fax number.
Planned Start and Planned End	A service representative is supposed to arrive at the customer site between the planned start and end date.
Scheduled Start	The actual scheduled time a service representative arrives at the customer site.
Scheduled End	The scheduled end date is either the start date plus the effort or the end date of the time window that was offered to a customer when it was scheduled with the Window to Promise.

Service Request tab

When the task originates from a service request, details for the service request are displayed in the Service Request tab, as described in the following table.

Field	Description
Request	Service request number. Right click this field to bring up a pop up menu to access the service request form.
Order Date	Date the service request was created.
Summary	A summary of the service request.
Organization Unit	The organization unit that the service request belongs to.
Problem	A problem description for the service request.
Resolution	A resolution description for the service request.
Service History	You can view the service history for a customer site or a product by clicking this button. For more details, refer to Viewing Service History .
Task	Task information for your reference is displayed.

Escalations tab

The Escalations tab gives you a summary and status of all the present escalation notifications. An escalation occurs when a task becomes non-conforming. A task becomes non-conforming when some of the criteria for it to be assigned and resolved either cannot be met or are close to not being met. For example, suppose the contract agreement guarantees a four hour response time, and after 3.5 hours the task has not yet been assigned. The task then becomes non-conforming and is escalated.

Spares tab

The Spares tab gives a summary of the spare parts necessary to resolve the task and their status. Selecting the Requirement Number (hyperlink) in the results spread-table opens the Parts Requirement window for this task.

To access the Spares Management application choose Spares Management from the Navigate menu on the toolbar. The Parts Search user interface is shown, allowing you to search for specific parts.

Product tab

The Product tab shows details about the product from the service request. Additional information is displayed when the product is defined as an installed base item. The Installed Base flag is checked if Installed Base validation was selected on the service request.

Field	Description
Request	The related service request number.
Description	A description of the product.
Serial number.	Serial number, if applicable.
Lot	Lot number, if applicable.
Installed base	Indicates if the product is defined as an installed base item.
Contract Type	The contract type for the product, if applicable.
Description	A description of the contract type.
Revision	Revision number, if applicable.
Task	Task information for your reference is displayed.

Resources tab

When the task is scheduled, the Resources tab shows you which service representative or service representatives are assigned (Assignee) to the task and their status. If Scheduler is installed, a route description is given.

Field	Description
Assignee	The name of the service representative to whom the task is assigned.
Type	The resource type.
Status	The status of the service representative assigned to the task. This status field is updated when a service representative in the field updates it.
Travel Time	The amount of travel time from the previous task to the current task.
More	Click More to display the route information.
Task	Task information for your reference is displayed.

Address tab

The addresses of the customer and the product that needs service are shown.

Contacts tab

Shown is the title, first name, last name, and phone number, extension and email address of the contact person. This can be the contact person of the service request or the contact person of the task, for these can be different. You can select the Source from the list of values (showing only Service Request and Task). Default the contact person of the service request is shown.

Required Skills tab

Shown are the required skills for the task: Skill Type, Skill Name and Skill Level. It is not possible to make any changes in this tab. If a skill is disabled in the Assign Skills to Task module, the Disabled checkbox is checked.

2.4 Selecting Territories

Use this procedure to select a group or groups of service representatives. The Dispatch Center shows the group or groups selected on the plan board, gantt, and map.

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center > (M) Navigate > Select Territories**.
2. Make a selection from the territories assigned to you.
3. To view all territories, including the ones not assigned to you, check the **Show all territories** box.
4. Click **OK**.

The groups of service representatives selected are displayed on the plan board, gantt, and map.

2.5 Managing Skills and Skill Levels

Skills are the field service representative's competencies. Skills fall into three major categories: product skills, other technical skills, and non-technical skills. The skill level indicates the expertise scale of the field service representative's skill. For example, expert, trainee, and experienced could be skill levels. Learn from this

procedure how to setup skills and skill levels and how to assign them to field service representatives.

Use this procedure to setup skills and skill levels and assign these to the field service representatives.

Prerequisites

None.

Steps

1. Navigate to:
 - **(R) Field Service Dispatcher > Dispatch Center > (M) Navigate > Skills Management.**
 - **(R) Field Service Dispatcher > Dispatch Center > (T) Plan Board > Right click on a resource name > Skills Management.**

The Skills Management window is opened.

2. Select the Resources tab.
3. Select the appropriate resource type from the Resource Type list of values.
4. Select a field service representative name from the Resource Name list of values. The list of values only displays the field service representatives who have been assigned to the Resource Type you selected.
5. Select a Skills Type from the Skills Type list of values.
6. The Skills Name is filled in automatically
7. Select a Skill Level from the Level list of values.
8. The start date (From date field) defaults to today's date. You can override this value if needed.
9. The end date (To date field) is used to inactivate the relevant skill of the field service representative.
10. Save your work.
11. Selecting the Switch View button shows all resources having the selected skill.
12. Select the Skills tab.
13. Enter the Skill Type Name.
14. Enter a Skill Type Description (optional).

15. Enter the Use Scale by selecting from the Use Scale list of values.
16. The start date (From date field) defaults to today's date. You can override this value if needed.
17. The end date (To date field) is used to inactivate the Skill Type. This applies to all skills of this Skill Type.
18. Enter the Skills Name.
19. Enter the Skill Description (optional).
20. Enter a possible Alias (optional).
21. The start date (From date field) defaults to today's date. You can override this value if needed.
22. The end date (To date field) is used to inactivate the Skill.
23. Save your work.
24. Select the Skill Levels tab
25. Enter the Rating Scale Name.
26. Enter the Rating Scale Description (optional).
27. The start date (From date field) defaults to today's date. You can override this value if needed.
28. The end date (To date field) is used to inactivate the Rating Scale.
29. Enter the Order of the Skill Level (lowest number is highest in rank).
30. Enter the Level Name.
31. Enter the Level Description (optional).
32. The start date (From date field) defaults to today's date. You can override this value if needed.
33. The end date (To date field) is used to inactivate the Level.
34. Save your work.

2.6 Assigning Skills to Tasks

If a task has skills assigned, Scheduler can take these skills into account when searching for the best possible resource to do the job. Learn from this procedure how to assign skills and skill levels to Tasks.

Use this procedure to assign skills and skill levels to tasks.

Prerequisites

Skills and Skill levels are set up.

Steps

1. Navigate to:
 - **(R) Field Service Dispatcher > Skills Assignment to Tasks.**
 - **(R) Field Service Dispatcher > Dispatch Center > (M) Navigate > Skills Assignment.**
2. The Find Tasks window is shown. The Skills Assignment window is opened directly if a task is active only.
3. Enter the search criteria and click Find.
4. The Result Window form appears.
5. Select a task by double clicking one of the Results lines or by selecting a line and clicking **OK**.
6. The Skills Assignment window is opened for the selected task (the task details are filled in the header part of the window).
7. Select the Task tab.
8. Select the Skill Type from the Skill Type list of values.
9. Select the Skill Name from the Skill Name list of values.
10. The Skill Description - if setup - is displayed automatically.
11. Select the Skill Level from the Skill Level list of values.
12. Check the Disable Skill checkbox only if Scheduler should not take this skill into account.
13. Save your work.
14. Click the **Next** button to continue assigning skills for the next task from the Results Window.
15. Click the **Previous** button to continue assigning skills for the previous task from the Results Window.
16. Select the flashlight icon to open the Find Tasks window again.

2.7 Assigning Skills to Task Templates

If a task has skills assigned, Scheduler can take these skills into account when searching for the best possible resource to do the job. Learn from this procedure how to assign skills and skill levels to Task Templates.

Use this procedure to assign skills and skill levels to task templates.

Prerequisites

- Skills and Skill levels are set up.
- Task Templates are set up.

Steps

1. Navigate to:
 - **(R) Field Service Dispatcher > Skills Assignment to Task Templates > (T) Task Template.**
 - **(R) Field Service Dispatcher > Dispatch Center > (M) Navigate > Skills Assignment > (T) Task Template.**
2. Select the Task Template group name from the Task Template Group Name list of values
3. The Task Template Description is displayed automatically.
4. The start date (From date field) is displayed automatically.
5. The end date (To date field) is displayed automatically.
6. Select the Task Template from the Task Template list of values.
7. Select the Skill Type from the Skill Type list of values.
8. Select the Skill Name from the Skill Name list of values.
9. The Skill Description - if setup - is displayed automatically.
10. Select the Skill Level from the Skill Level list of values.
11. Check the Disable Skill checkbox only if Scheduler should not take this skill into account.
12. Save your work.

2.8 Accessing Spares Management

Access to Spares Management from the Dispatch Center allows you to search for certain parts. This will be possible throughout all inventory organizations and sub inventories. Learn from this procedure how to access Spares Management from the Dispatch Center.

Use this procedure to search for certain parts.

Prerequisites

None.

Steps

1. Navigate to **(R) Field Service Dispatcher > Dispatch Center > (M) Navigate > Spares Management.**

The Parts Search user interface is opened.

2.9 Viewing Resource Addresses and Sub Inventories

A typical field service organization may have hundreds and even thousands of field service representatives, this window is designed to provide an efficient method for viewing ship to addresses and sub inventories for your field service representatives. Learn from this procedure how to view the ship to addresses and sub inventories of a field service representative.

Prerequisites

- Field service representatives must be defined as employees.
- Sub inventories must be defined.
- Spares Management must be installed and setup.

Steps

1. Navigate to the Resources Addresses and Sub inventories window by following the navigation path:
 - **(R) Field Service Dispatcher > Dispatch Center > (M) Navigate > Resource Addresses and Sub inventories.**
 - **(R) Field Service Dispatcher > Dispatch Center > (T) Plan Board > Right click on a resource name > Resource Addresses and Sub inventories.**

The Resource Addresses and Sub inventories window is opened. For more information see [Administering Resources Addresses and Sub Inventories](#).

2.10 Viewing the Parts Requirement of a Task

When a field service representative discovers that additional parts are required to complete a service request task, the dispatcher is usually notified. The dispatcher then creates a follow up task and uses the functionality provided in the Spares Management Parts Requirement form to generate an internal order for the required parts. Learn from this procedure how to access Parts Requirement from the Dispatch Center.

When parts are required to resolve a task, the Spares tab gives you an overview of the needed spare parts. Use this procedure to view the required parts to resolve the task.

Prerequisites

None.

Steps

1. Navigate to the Parts Requirement window by following the navigation path:
 - **(R) Field Service Dispatcher > Dispatch Center > (M) Navigate > Parts Requirement.**
 - **(R) Field Service Dispatcher > Dispatch Center > (T) Plan Board > Right click on a task (Tasks list) > Parts Requirement.**
 - **(R) Field Service Dispatcher > Dispatch Center > Right click on a task (Tasks list) > Parts Requirement.**
 - **(R) Field Service Dispatcher > Dispatch Center > (T) Spares > Select Requirement number (hyperlink) > Parts Requirement.**

The Parts Requirement window is opened. For more information see [Creating the Parts Requirement](#).

2.11 Working with the Plan Board

The Plan Board provides information on service representative's schedules in a daily view. From the Plan Board you can also start a debrief report, assign a task, send a message, access the source document, recalculate a trip, optimize a trip, block / unblock a trip, view the required parts for a task, get the resource's

addresses and sub inventories, and get resource details. Learn from this procedure how to use the Plan Board.

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Plan Board tab. The tasks and trips for the current day for the group of service representatives you are monitoring are shown.
3. Click **More** to enlarge the plan board.
4. Select **Date** to change the date to view.
5. Click **Goto** to focus on a specific service representative. The service representative's name is highlighted and visible on the plan board.
6. Right click the service representative's name on the plan board to bring up a popup menu.
 - a. Click **Resource Information** to view service representative details such as Name, Phone number, and Email address.
 - b. Click **Commit Schedule** to commit the resource's schedule.
 - c. Click **Resource Addresses and sub inventories** to view the resource's addresses and sub inventories.
 - d. Click **Skills Management** to view the resource's skills and corresponding skill levels. The Resources tab of the Skills Management form is opened for the selected resource.
7. Right click a task to bring up a popup menu.
 - a. Click **Show Source Document** to open the window the task is created from.
 - b. Click **Debrief** to report on a performed task. The Debrief Report window is opened.
 - c. Click **Send Message** to send a message to another user.
 - d. Click **Schedule Advise** to assign a task to the service representative. The Scheduling Advice window opens with the service representative's name populated in the My Suggestion field.

- e. Select **Parts Requirement** to view the required parts for the selected task. The Parts Requirement window is opened for the selected task.
8. Right clicking a departure task on the plan board brings up a popup menu.
 - a. Click **Block this Trip** to block a trip. As a result, the trip will no longer be available when scheduling a task. This function is available only for an empty trip (so not containing any tasks) that is not yet blocked.
 - b. Click **Unblock this Trip** to undo the block of a trip. This function is available only for an empty trip (so not containing any tasks) that is blocked.
 - c. Click **Optimize Trip** to optimize the trip. This might affect the tasks order in the trip. This function is available only when Scheduler is installed.
 - d. Click **Recalculate Trip** to eliminate time conflicts within the trip. The tasks order in the trip will not be altered. This function is available only when Scheduler is installed.
9. To view other service representatives, choose Select Territories from the Navigate menu on the tool bar.

2.12 Working with the Gantt

Use the gantt to view progress on the service representative schedules or for task assignment. A time line is shown to indicate the current date and time. Use this procedure to learn the possibilities of using the gantt.

Shifts are indicated in yellow. Scheduled tasks show up in blue bars, escalated tasks show up in red bars, and travel time is shown as a transparent beginning of a scheduled task (Scheduler functionality). Use the scroll bars in the Resource section and gantt chart to view more details or dates.

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Gantt tab. Shown are service representatives with their shifts and assigned tasks.
3. Click **More** to enlarge the gantt.

4. Select a date at **From** and **To** to define a date range you want to view.
5. Click **Goto** to focus on a specific service representative's schedule. The service representative's name is highlighted and visible.
6. Right click the date or time on the Gantt chart header to change the view of the Gantt chart. You can choose from one of the following options: 15 Minutes, 30 Minutes, Hours, Three Hours, Six Hours or Days.
7. View a task description by moving the mouse over a task. Wait a moment and a task description is shown.
8. To view task details double click a task. The source document opens, showing the task details. For example, for a service request task the Service Request window opens.
9. Move a task from one service representative to another by dragging and dropping it.

Note: When you use drag and drop, no check is performed to confirm whether it is the best option or even a possible option.

2.13 Working with the Map

On the map the service representatives are shown in a geographical representation with an easy to view status for the current date. Use this procedure to learn the possibilities of using the map. You can use the map for monitoring as well as scheduling purposes.

Prerequisites

A spatial data product should be installed for map display.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Map tab. The service representatives you are managing are shown.
3. You can also click **Reset** to show the map in its entirety when only a fragment is shown.
4. To change the map, choose it from the list of values in the Service Area.
5. Click **More** to enlarge the map to full window size.

6. Click **Goto** to focus on a specific service representative.
7. Use the **Zoom** and **Navigate** buttons to navigate through the map. You can also draw a box on the map with your pointer device to zoom in to that particular area.
8. To view a task or tasks on the map, select them from the task list by checking them. Click **Show** from the **Tasks** area. The selected tasks with their location are shown on the map.
9. Double click on a task for details. The **Service Request** window opens, showing the **Task** tab.
10. To assign a task to a service representative, check a task from the task list and double click on a service representative of your choice. The **Assignment Manager** or **Scheduler** (if installed) opens. The service representative is defaulted as the option for **My Suggestion**.
11. Click **Clear** to remove the tasks from the map.

Note: The tasks remain checked in the task list.

12. Click **Save** to save your current map settings. This is used to display the map the next time you use the map.

2.14 Scheduling Tasks

There are different ways to schedule tasks from the Dispatch Center. Choose one of the following options to learn more about scheduling tasks.

Options for scheduling are:

- [Scheduling a Task Manually](#)
- [Selecting a Schedule Option](#)
 - [Scheduling Using the Unassisted Option](#)
 - [Scheduling Using the Assisted Option](#)
 - [Scheduling Using the Window to Promise Option](#)
 - [Scheduling Using the Intelligent Option](#)
- [Scheduling a Task for Multiple Resources](#)
- [Scheduling a Single Task or Multiple Tasks Automatically](#)
- [Viewing Failed Autonomous Schedule Assignments](#)
- [Optimizing a Service Representative's Trip](#)
- [Recalculating a Service Representative's Trip](#)
- [Recalculating All Trips](#)
- [Cancelling a Scheduled Task](#)
- [Re-assigning a Scheduled Task](#)
 - [Re-assigning a Scheduled Task from the Gantt chart](#)
 - [Re-assigning a Scheduled Task from the Plan Board](#)

2.15 Scheduling a Task Manually

You can manually assign a task to one or more field service representatives in three ways:

- From the Plan Board (right click on a task)
- From the Dispatch Center (Advise button)
- From the Tasks list (right click on a task)

The Scheduling Advice window is always opened to assist you in the assignment. When the Scheduler is installed all options for scheduling are available to you.

When the Scheduler is not installed only the Assisted and Unassisted options are available and you make use of Assignment Manager functionality.

When scheduling from the plan board or map, you make a suggestion for a field service representative to be taken into account when the scheduling criteria are applied. When based on the scheduling criteria no suitable service representative was found, your suggestion is still presented as an option. When scheduling from the Dispatch Center (Advise button) only those service representatives that are suitable based on the scheduling criteria applied are presented to you. It could happen no service representatives are found.

Use this procedure to schedule a single task manually.

Prerequisites

Make sure you read the [The Scheduling and Task Assignment Process](#) topic from the Understanding section.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Populate the Tasks list with [tasks](#).
3. There are several options to plan manually, choose one of the following:
 - In the Tasks list, select the checkbox next to the task you want to schedule and click **Advise**
 - In the Tasks list, right click the task you want to schedule and select **Schedule Advise** from the popup menu
 - From the Plan Board, right click the task you want to reschedule and select **Schedule Advise** from the popup menu

The Scheduling Advice window is opened.

4. Choose an Assistance Level to help you with the assignment. For more information please refer to [Selecting a Schedule Option](#) or choose one of the following options directly:
 - [Scheduling Using the Unassisted Option](#)
 - [Scheduling Using the Assisted Option](#)
 - [Scheduling Using the Window to Promise Option](#)
 - [Scheduling Using the Intelligent Option](#)

2.16 Scheduling Using the Unassisted Option

Use the Unassisted option to assign a task to a resource of your choice. None of the criteria or Scheduler features are applied. This means that if parts are required for the task, you need to order them separately.

Prerequisites

Make sure you read the [The Scheduling and Task Assignment Process](#) topic from the Understanding section.

Steps

1. Navigate to the [Scheduling Advice window](#).
2. Select the Preferences tab.
3. Click **Unassisted**.
4. In the My Suggestion region make an entry for the resource Type or Name.
5. Click **Search**. The resource or resources are displayed in the Advice tab.
6. Double click on a resource of your choice. The Start and End fields are populated with the scheduled date.
7. Click **Schedule**. A task assignment is created.
8. The plan board and gantt are refreshed.

2.17 Scheduling Using the Assisted Option

Use the Assisted option to assign a task to a resource based on a selection of criteria using Assignment Manager functionality. Spare parts availability is not taken into account. This means that if parts are required for the task, you need to order them separately.

Prerequisites

Make sure you read the [The Scheduling and Task Assignment Process](#) topic from the Understanding section.

Steps

1. Navigate to the [Scheduling Advice window](#).
2. Select the Preferences tab.

3. Click **Assisted**.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, a resource recommended from Installed Base or Skills. Also select if you want to check resources availability.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. Click **Search**. The qualified resources found are displayed in the Advice tab. Already assigned tasks show up in blue, schedule options show up in green.
7. Double click on a resource of your choice. The Start and End fields are populated with the scheduled date.
8. Click **Schedule**. A task assignment is created.
9. The plan board and gantt are refreshed.

2.18 Scheduling Using the Window to Promise Option

The Window to Promise option is only available when Scheduler is installed. Use the Window to Promise option to assign a time slot to a resource based on a selection of criteria using Scheduler functionality. Displayed are possible time slots to offer a customer with related cost.

After task assignment with the Window to Promise a time slot is reserved for a customer and the Planned Start and End dates are set accordingly. A time slot is also assigned to a resource but later in the process you can choose to optimize the assignment by assigning it to another resource or [optimize the resources trip](#).

Prerequisites

Oracle Scheduler is installed. Make sure you read the [The Scheduling and Task Assignment Process](#) topic from the Understanding section.

Steps

1. Navigate to the [Scheduling Advice window](#).
2. Select the Preferences tab.
3. Click **Window to Promise**.

4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, a resource recommended from Installed Base or Skills. Also select if you want to check resources availability.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. In the Spares region choose an Availability Condition from the list of values. For more information on availability conditions please refer to Understanding Scheduler.
7. Click **Search**. The possible time slots with related cost are displayed in the Advice tab.
8. Select an option from the list of values at View Window to view only the options for a certain time slot.
9. Select a time slot of your choice and click **Schedule**. The Planned Start and End date for the task is set accordingly. A task assignment is created.
10. The plan board and gantt are refreshed.

Guidelines

The time slot with the lowest cost addressed is in most cases the best option to offer your customer.

2.19 Scheduling Using the Intelligent Option

The Intelligent option is only available when Scheduler is installed. Use the Intelligent option to assign a task to a resource based on a selection of criteria using Scheduler functionality.

Prerequisites

Oracle Scheduler is installed. Make sure you read the [The Scheduling and Task Assignment Process](#) topic from the Understanding section.

Steps

1. Navigate to the [Scheduling Advice window](#).
2. Select the Preferences tab.
3. Click **Intelligent**.

4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, a resource recommended from Installed Base or Skills. Also select if you want to check resources availability.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. In the Spares region choose an Availability Condition from the list of values. For more information on availability conditions please refer to Understanding Scheduler.
7. Click **Search**. The qualified resources with related cost found are displayed in the Advice tab.

Already assigned tasks show up in blue, schedule options show up in green. Travel time in between tasks are transparent.
8. Double click on a resource of your choice. The Start and End fields are populated with the scheduled date.
9. Click **Schedule**. A task assignment is created.

2.20 Scheduling a Task for Multiple Resources

You can assign a task to multiple resources, this can only be done assisted by the Assignment Manager and has to be done manually.

Use this procedure to assign a task to multiple resources.

Prerequisites

Make sure you read the [The Scheduling and Task Assignment Process](#) topic from the Understanding section.

Steps

1. Navigate to the [Scheduling Advice window](#).
2. Select the Preferences tab.
3. Click **Assisted**.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, or a resource recommended from Installed Base. Also select if you want to check a resources availability.

5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. Click **Search**. The qualified resources found are displayed in the Advice tab. Already assigned tasks show up in blue, schedule options show up in green.
7. Select a resource of your choice and to add it to an already assigned task, check the **Add Resource** checkbox.
8. Click **Schedule**. A task assignment is created.

2.21 Scheduling a Task or Tasks Automatically

You can schedule a single task or multiple tasks automatically directly from the dispatch center. The scheduling criteria applied come from Scheduler and use default settings. It is also possible to run a concurrent program, Autonomous Scheduler, that schedules tasks automatically in the background without interference of a dispatcher. This is setup at implementation.

Use this procedure to schedule a single task or multiple tasks automatically from the Dispatch Center.

Prerequisites

Oracle Scheduler is installed. Make sure you read the [The Scheduling and Task Assignment Process](#) topic from the Understanding section.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Populate the Tasks list with [tasks](#).
3. Check the box next to the task you want to schedule. To check all tasks at once choose **Select All Tasks** from the Tools menu on the toolbar.
4. Click **Auto Schedule**. The plan board and gantt are refreshed.

When during the scheduling process an assignment for a task fails, you are prompted with an error message telling you why scheduling failed. Resolve the issue for the task. The Auto Schedule process needs to be re initiated to schedule the remainder of the tasks.

2.22 Viewing Failed Autonomous Schedule Assignments

Use this procedure when a concurrent program, Autonomous Scheduler, is active that schedules tasks automatically in the background without involvement of a dispatcher. The program picks up tasks to schedule at set time intervals. This is Scheduler specific functionality.

When Scheduler is not able to schedule a task for some reason, the task status is set to Auto Rejected. This enables you to find failed tasks more easily from the Dispatch Center. An output file is generated with a problem description for the failed task. When the problem for the task has been resolved, change the status back to a can be scheduled status.

Use this procedure to view the output file with the problem description for the task.

Prerequisites

Oracle Scheduler is installed.

Steps

1. Navigate to **Field Service Dispatcher > Other > View Requests**. The Find Requests window is opened.
2. Click **Submit a New Request**. The Submit a New Request window is opened.
3. Choose the Single Request option.
4. Click **OK**. The Submit Request window is opened.
5. At Name choose **Autonomous Auto Schedule** from the list of values and click **OK**.
6. Click **Submit**. The Decision window is opened.
7. Click **No**. You will return to the Find Requests window.
8. Click **Find**. The Request window is opened.
9. Look for the requests with the Name Autonomous Auto Schedule. Check the Phase and Status. If Phase is Completed and the Status is something other than Normal, something went wrong during the process of assigning a task to a resource when executing the Autonomous Auto Schedule program.
10. Click View Output to view the output file with the problem description for the task.

2.23 Optimizing a Service Representative's Trip

Use this procedure to optimize a service representative's Trip. This might affect the tasks order in the trip.

Prerequisites

None

Steps

1. Navigate to **(R) Field Service Dispatcher > Dispatch Center > (T) Plan Board > Right click on a departure task > Optimize Trip.**
2. The function is carried out immediately.

2.24 Recalculating a Service Representative's Trip

Use this procedure to update and optimize a service representative's trip after task assignment and before task commitment. This will eliminate time conflicts within the trip and reset the scheduled start times of all tasks in the trip, accordingly.

Prerequisites

Scheduler must be installed.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center.**
2. Select the plan board.
3. Select the service representative's name and right click it. The popup menu appears.
4. Click **Recalculate Trip.**

2.25 Recalculating All Trips

Use this procedure to update and optimize all service representatives trips shown on the plan board after task assignment, and before task commitment. This will eliminate time conflicts within the trip and reset the scheduled start times of all tasks in the trip, accordingly.

Prerequisites

Scheduler must be installed.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the plan board. Make sure all the service representatives you want to recalculate the trips for are shown on the plan board. Refer to the [Selecting Territories](#) procedure to do so.
3. From the Tools menu select **Recalculate All Trips**.

2.26 Canceling a Scheduled Task

To cancel a scheduled task you need to cancel all task assignments for the task. Once a task is canceled you can choose to schedule it again or close it.

Use this procedure to cancel a scheduled task or task assignment.

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Populate the Tasks list with the [task](#).
3. Select the task (no need to check it).
4. Select the Resources tab.
5. Change the task assignment Status for each resource to **Cancelled**.
6. Click **Save**.
7. Click **Refresh**, the task status is changed accordingly.

2.27 Re-assigning a Scheduled Task

Use either of the following procedures to assign an already assigned task from one service representative to another.

- Re-assigning a Scheduled Task from the Gantt chart

- Re-assigning a Scheduled Task from the Plan Board

2.27.1 Re-assigning a Scheduled Task from the Gantt chart

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Gantt tab.
3. Select a task in the service representative's trip, drag and drop it onto the service representative you want to assign the task to.

Note: When using drag and drop, no check is performed if it is the best or even a possible option.

4. Click **Undo** to cancel the drag and drop action.

2.27.2 Re-assigning a Scheduled Task from the Plan Board

Prerequisites

None.

Steps

1. Navigate to **(R) Field Service Dispatcher > Dispatch Center > (T) Plan Board > Right click on Task > Scheduling Advise**.
2. The Scheduling Advice window is opened.

2.28 Committing the Schedule

You have to commit the schedule so it get's communicated to the service representatives. Also at commitment, any parts reservations created by Scheduler at task assignment are ordered when the schedule is committed. Committing the schedule can be done manually as well as automatically. For automatic commitment a concurrent program runs in the background. This is setup at implementation.

Use this procedure to change task status for all tasks for a selected date manually.

Prerequisites

None.

Steps

1. Navigate to Commit Schedule:
 - **(R) Field Service Dispatcher > Commit Schedule.**
 - **(R) Field Service Dispatcher > Dispatch Center > (M) Navigate > Commit Schedule.**
 - **(R) Field Service Dispatcher > Dispatch Center > (T) Plan Board > Right click on a resource name > Commit Schedule.**

The Commit Schedule window is opened.

2. Select the Schedule tab.
3. Indicate the date to the commit schedule for at Time Frame. This could be for schedules created in the past hour but also for one or more days. When the function has been started by right clicking a resource name in the plan board, the 'From' date field contains the active date of the plan board. In the other cases, the 'From' date contains the current date. In all cases, the default 'To' date is the 'From' date + 1.

When this area is left blank, all schedules found for the selected task status are committed.

4. At Resource define a specific resource or a resource group to commit the schedule for. When starting the function by right clicking a resource name in the plan board, the resource name is filled in already. When this area is left blank, all schedules for the selected task status are committed.
5. Select the Options tab.
6. Make a selection from the list of values at From and To to define the tasks status transition at commitment.
7. Click **OK**. The schedule is committed. The Task Status is changed to the status defined at To in the previous step.

2.29 Reporting on Tasks

In Debrief you can report on labor time, parts used, expenses made, and record counter readings.

Use this procedure to start or open a Debrief for a task from the Dispatch Center.

Prerequisites

None.

Steps.

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the plan board.
3. Select the task you want to report on and right click it. The popup menu appears.
4. Click **Debrief**. The Debrief window is opened with the task information populated.
5. Please refer to [Working with Debrief](#) for details.

2.30 Viewing Service History

Use this procedure to view the service history for a customer site or a product.

Prerequisites

None.

Steps.

1. Navigate to:
 - **Field Service Dispatcher > Service History**.
 - **Field Service Dispatcher > Dispatch Center > (M) Navigate > Service History**.
2. The Service History window is opened.
3. To view service history by customer address make a selection from the Site list of values.

4. To view service history for a specific product make a selection from the Unit list of values.
5. You can also create a combined query.
6. Refine your query by entering values at Ordering Date Period and choose a Problem description from the list of values.
7. Click **Search**.

2.31 Viewing the Service Request Details

When the task originates from a service request, the Service Request form can be accessed to view all details. Learn from this procedure how to access the Service Request form.

Use this procedure to access the Service Request form.

Prerequisites

None.

Steps

1. Navigate to **(R) Field Service Dispatcher > Dispatch Center > Right click on a Task in the Tasks list > Show Service Request**.

The Service Request form is shown.

Using Debrief

This topic group provides process-oriented, task based procedures for using Debrief.

Topics covered are:

- [Opening a Debrief](#)
- [Viewing and Creating Notes](#)
- [Accessing your Calendar](#)
- [Entering Materials](#)
- [Entering Expenses](#)
- [Entering Labor Time](#)
- [Viewing Onhand Quantity](#)
- [Recording Counter Readings](#)
- [Viewing Parts Requirement](#)
- [Viewing Service Request](#)
- [Updating the Task Assignment Status](#)

3.1 Opening a Debrief

Use this procedure to create or open a Debrief for a task.

Prerequisites

A service request and task to report on.

Steps

1. Navigate to **Field Service Representative > My Tasks**. The Debrief window opens with the list of all the tasks assigned to the service representative with scheduled start date less than or equal to the system date.
2. Navigate to **Field Service Manager/Dispatcher > Debrief**. The Find Tasks window is opened.
3. Place your cursor in any of the fields. Select the desired name or number from the list of values, or enter it.

To search for a Resource Name, first choose Employee Resource Type from the Resource Type list of values.
4. Click **Find**. A spread table with the list of tasks assigned to the specified resource appears in debrief header region. The Debrief number column shows if a debrief has already been created or not.
5. Depending on the record selected in the debrief header, the debrief detail is populated automatically.
6. You can also access debrief by navigating to **Field Service Manager/Dispatcher > Service Request > (T) Tasks > (B) More**. In case of an existing tasks assignment, the debrief detail window is opened else the find window is opened.

3.2 Viewing and Creating Notes

For each task a note might have been added. Use this procedure to view notes and create notes.

Prerequisites

Notes button on the debrief window is enabled only if the debrief number is generated.

Steps

1. Navigate to the [Debrief](#) window.
2. Click **Notes**. The Notes window is opened. When a note was created for this task, you can view it here.
3. Click **New** to create a note for the task.
4. For detailed instructions please click the **Help** icon.

3.3 Accessing your Calendar

At any time you can access your Calendar from Debrief. Use this procedure to open your calendar.

Prerequisites

None.

Steps

1. Navigate to the [Debrief](#) window.
2. Click **Calendar**. The Calendar window is opened.
3. For detailed instructions please click the **Help** icon.

3.4 Entering Material

When at work out in the field you need to report on the materials used. This information is necessary to maintain your supply of materials, maintain the customers installed base, and to be able to invoice the customer for the materials used. You enter materials information at line level and update inventory, installed base, and charges for a specific line. Use this procedure to report on material transactions for a task.

Prerequisites

A service request and task to report on. The setup for transaction type should be complete. The item setup should be complete and the items should have the "Service Billable Flag" set to material. The resources should have sub inventories assigned to them. In case of trackable items instance number should be generated. The items also need to have price list associated with it.

Steps

1. Navigate to the [Debrief](#) window.
2. Select the Materials tab.
3. Choose a Transaction Type from the list of values. This is the activity you are going to perform for the material you are reporting on. Based on this selection fields need to be populated further down the material line. Fields that are greyed out don't need to be populated. Fields that are white are optional and fields that are yellow are mandatory.

4. The Parts Used/Recovered is populated based on the transaction type. For the transaction types with line category code "Order", parts used/recovered defaults to Parts Used and in case of line category code "Return", parts used/recovered defaults to Parts Recovered.
5. The item LOV is filtered based on a transaction type. In case the **update IB** flag is checked for a transaction type, the items LOV will display both trackable and non-trackable items else it will display only non-trackable items.
6. The UOM is defaulted but you can choose to select a different UOM from the list of values.
7. Enter the amount of the material used at **Qty**. In case of serialized items Qty is 1.
8. The LOV for sub inventory is dependent on the line category code defined in the transaction type setup form. In case the line category code is defined as "Order" the sub inventory gets populated with the default usable sub inventory. The LOV will then display only usable sub inventories. In case where the line category code is "return" the sub inventory gets populated with the default defective sub inventory. However the LOV for sub inventory will display both usable and defective sub inventories.
9. Enter the serial number, lot, locator, revision, instance number details depending on the item attributes. The LOV for these is validated based upon the item and sub inventory combination.
10. Choose a Service Date from the date list of values. The system date is defaulted.
11. Optionally choose a Reason for the material transaction from the list of values.
12. The Disposition field is defaulted once the Item is selected.
13. In case an item is **Installed base** trackable and the line category code on the transaction type setup form is "Order", the parent product and the recovered product field is enabled. The parent product LOV displays the list of all the instances installed at the customer location. In case of line category code "Return" the recovered product field is enabled.
14. Optionally the user can update the parts status on the debrief line.
15. Enter the return reason for the recovered transaction.
16. Click **Save**. The material line is saved.
17. Please refer to [Updating the Task Assignment Status](#) for more details.

Guidelines

You can create multiple material transaction lines before saving and updating. For replacements you always need at least two material transaction lines, one for the part taken out/removed and one for the part put back in/installed. When you have performed an update you can't modify the transaction lines that have been successfully updated. You can however still add new material transaction lines and update them.

3.5 Entering Expenses

You can use the Expenses tab to report any expenses accrued during a customer visit. Expenses may include a meal or driving costs. Use this procedure to enter expenses.

Prerequisites

A task with a status to report on.

Steps

1. Navigate to the [Debrief](#) window.
2. Select the Expenses tab.
3. Choose a Transaction Type from the list of values. This is the activity you are going to perform for the expense you are reporting on.
4. Select the Item you are going to create an expense line for. The Item Description field is populated with an extended description for the item. The UOM is defaulted after selection.
5. You can either enter the UOM and Quantity or the Amount and Currency. Quantity and Amount are mutually exclusive.
6. Choose a Service Date from the date list of values. The system date is defaulted.
7. Optionally choose a Justification for the expense from the list of values.
8. The Channel Code field is populated automatically. It shows whether the resource that created the debrief is a connected user or a disconnected user. A disconnected user created the debrief from a mobile device.
9. Click **Save**. The expense line is saved.
10. Please refer to [Updating the Task Assignment Status](#) for more details.

Guidelines

You can create multiple expense lines before saving and updating. When you have performed an update you can't modify the expense lines that have been successfully updated. You can however still add new expense transaction lines and update them.

3.6 Entering Labor Time

When at work out in the field you need to record the hours spend on a task. Use this procedure to enter detailed labor information.

Prerequisites

A service request and task to report on.

Steps

1. Navigate to the [Debrief](#) window.
2. Select the Labor tab.
3. Choose a Transaction Type from the list of values. This is the activity you are going to perform for the labor you are reporting on.
4. Select the Item you are going to create a labor line for. The Item Description field is populated with an extended description for the item.
5. The UOM is defaulted but you can choose to select a different UOM from the list of values.
6. Enter the Start and End time for the labor.
7. The duration is populated based upon the start and end time. Optionally you can enter any two values and the third value will be displayed automatically.
8. Choose a Service Date from the date list of values. The system date is defaulted.
9. Optionally choose a Reason for recording the labor line from the list of values.
10. The Channel Code field is populated automatically. It shows whether the resource that created the debrief is a connected user or a disconnected user. A disconnected user created the debrief from a mobile device.
11. Click **Save**. The labor line is saved.
12. Please refer to [Updating the Task Assignment Status](#) for more details.

Guidelines

You can create multiple labor lines before saving and updating. When you have performed an update you can't modify the labor lines that have been successfully updated. You can however still add new labor transaction lines and update them.

3.7 Recording Counter Readings

Optionally you can record counter readings. Counter readings can only be recorded for customer products defined in the installed base which have an counter assigned to them. When the button is greyed out, no counter readings are associated with the product. Use this procedure to capture counter readings.

Prerequisites

The Installed base item against which a service request has been created must have a counter group setup and counters associated with it.

Steps

1. Navigate to the [Debrief](#) window.
2. Click **Counters**. The Counters window is opened.
3. Select the counter within the counter group of your choice and double click it. The Capture Counter Reading window is opened.
4. Enter a value for the counter reading.
5. Click **OK**. The value is saved.

3.8 Viewing Onhand Quantity

You can view the on-hand quantity for items within a selected inventory organization.

Prerequisites

Oracle Inventory is implemented.

Steps

1. Navigate to the [Debrief](#) window.
2. From the Tools menu click **View Onhand Quantity**.

3. Pick the organization from the LOV for which you want to view onhand quantity. The Find On-hand Quantities window is opened.
4. Enter the criteria that you want to use to limit the results of your search and click **Find**. The Item On-hand Quantities window is opened and a list of items that match your search criteria with on-hand quantity is displayed.
5. Click on the **Sub Inventories** button on the onhand quantity form to view sub inventories for the specified org.

3.9 Viewing Parts Requirement

Use this procedure to view and create parts requirement for a specified task.

Prerequisites

You must first create a task.

Steps

1. Navigate to the [Debrief](#) window.
2. From the Tools menu click **Parts requirement**.
3. The parts requirement window opens with the service request, task and the resource information populated in the header region.
4. The details region is populated in case there are any parts associated with the task. Optionally the user can also create new parts requirement from this window. For more information see [Creating the Parts Requirement](#).

3.10 Viewing Service Request

Use this procedure to view service request details for a specified task.

Prerequisites

None.

Steps

1. Navigate to the [Debrief](#) window.
2. From the Tools menu click **Service Request**. The service request window is opened with the service request and task details populated.

3. You have the ability to create an additional task from the service request window.
4. Optionally you can also navigate to charges to submit the charges for debrief.

3.11 Updating the Task Assignment Status

Use this procedure to update the assignment status and push information to inventory, installed base and charges.

Prerequisites

A service request and task to report on. Status transition engine must be setup for tasks.

Steps

1. Navigate to the [Debrief](#) window.
2. In the Assignment Status field, select the new task status from the list of values.
3. Click **Save**.
4. A concurrent program "CSF: Update Debrief Lines" is enabled. The concurrent program will push information to inventory, installed base and charges only if the task status has one of the following flags enabled in the tasks status setup form.
 - Completed
 - Closed
 - Cancelled
 - On Hold
 - Rejected
5. Optionally you can run this program manually by specifying the debrief number.
6. Depending on the status of the concurrent program, the debrief status on the debrief window is populated. The debrief status can have the following values:
 - Complete - indicates the debrief lines have been pushed to inventory, installed base and charges successfully.
 - Running - indicates the concurrent program is still running

- Pending - indicates the concurrent program is still running
 - Completed with errors - the concurrent program completed with error. The details error information can be viewed in the error column on debrief lines
7. Verify by logging into inventory, installed base and charges to view the processed information.

Guidelines

If there are multiple task assignments related to a task, then all task assignments must be closed in order for the task to be closed. This occurs when multiple field service representatives are assigned to the same task.