Oracle® Field Service

Concepts and Procedures

Release 11*i*

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Oracle Field Service Concepts and Procedures, Release 11*i*

Part No. A86063-01

Contents

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Oracle Field Service Concepts and Procedures, Release 11*i* (11.5.2).

Part No. A86063-01

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Preface

Welcome to the Oracle Customer Relationship Management, Release 11*i* (11.5.2), suite of applications.

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

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

Intended Audience

This guide is aimed at the following users:

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

Structure

This manual contains the following chapters:

"Understanding Field Service" 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.

"Understanding Field Service Report" 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.

“Using Field Service” provides process-oriented, task-based procedures for using the application to perform essential business tasks.

“Using Field Service Report” provides process-oriented, task-based procedures for using the application to perform essential business tasks.

“Administering Oracle Field Service" provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities.

Related Documents

For more information, see the following manuals:

- *Implementing Oracle Field Service*
- *Oracle Foundation Concepts and Procedures*
- *Oracle Scheduler Concepts and Procedures*
- *Oracle Field Service/Laptop Concepts and Procedures*
- *Oracle Field Service/Palm^{TM} Devices Concepts and Procedures*

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
- Field Service Overview
- The Field Service Process
- What is the Control Tower

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 application suite offers a range of products to meet your organization's business needs.

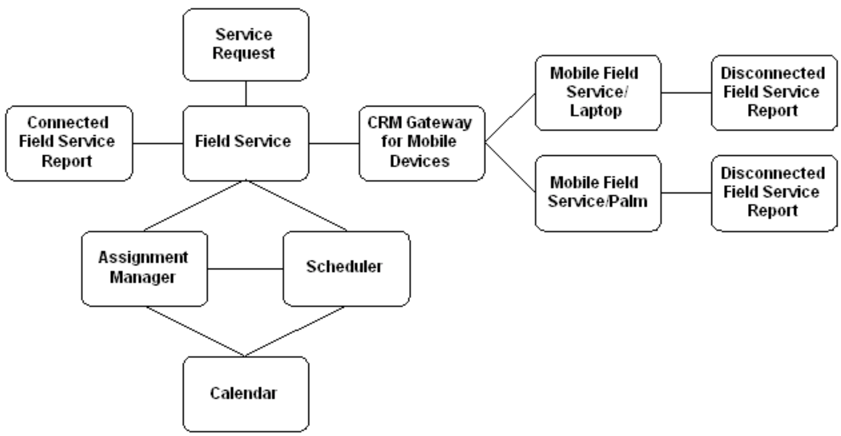

Table 1 Field Service Suite Products

Suite Product	Description
Field Service	The Field Service application assists in assigning tasks to service representatives, creating and dispatching daily schedules, and monitoring progress.
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	This is a remote application typically installed at a service representatives laptop to receive his daily schedule and report on progress.
Oracle Field Service/Palm™ Devices	This is a remote application for a handheld device so a service representative can receive his daily schedule and report on progress.

Table 1 Field Service Suite Products

Suite Product	Description
Assignment Manager	Assignment Manager is a foundation component. It assists in the assigning of ownership of documents and tasks and the availability needed to perform a task to qualified resources.
Scheduler	Scheduler enables optimization of scheduling capabilities of tasks to qualified resources.
Calendar	Calendar is a foundation component. It is used to define availability and non-availability of a resource.
Connected Field Service Report	Connected Field Service Report is used to report on labor, materials used, and expenses accrued on the CRM application side. Connected it is also used to report counter readings.
Disconnected Field Service Report	Disconnected Field Service Report is used to report on labor, materials used, and expenses for the mobile client side. It is a part of the Field Service/Laptop and Oracle Field Service/Palm™ Devices application.

Field Service Overview

Field Service is an essential part of the Field Service Application Suite. At the core of Field Service is the Control Tower which allows the field service dispatcher to plan, dispatch, and monitor all field service activities, ultimately ensuring that the right person is in the right place at the right time.

The features of Field Service include:

- Task assignment
- Scheduling and dispatching capabilities
- Monitoring service representatives activities
- Managing parts information
- Field service reporting

Task assignment is assisted by the use of the Assignment Manager. For more information, see Overview of Assignment Manager.

When the Scheduler is installed, you can optimize your scheduling capabilities. For more information, see Overview of Scheduler.

The Field Service Process

The entire field service process includes four 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. The Field Service application then assigns these tasks to service representatives. At the end the service representative reports on the performed tasks. This process is driven by service request status and task status changes. The task status flow is specific to the Field Service application and therefore explained in more detail below.

Reviewed in more detail is:

- The Field Service Process
- Task Status Flow

The Field Service Process

The four major areas in the field service process are visualized in the diagram below. The Field Service application supports step 3 and 4 in the field service process.

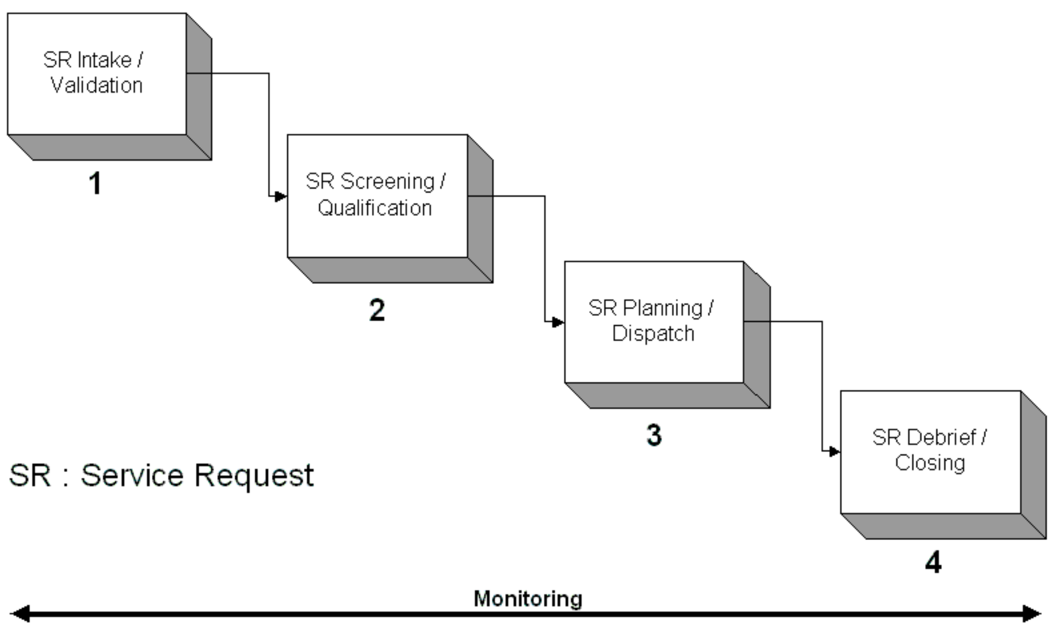

Table 2 Steps in the Field Service Process

Step		Description
1.	Field Service Request Intake & Validation	When a customer contacts the field service department, an agent creates a new service request. The call center agent enters customer information into the service request form and validates this information if necessary.
2.	Field Service Request Screening & Qualification	The service request is analyzed by a support agent who searches the knowledge base for a solution and creates a task based on the problem description and action needed to solve the problem.
3.	Field Service Request Planning & Dispatch	Once a task is created, it can be assigned to a single or multiple resource for completion. The resource receives notification and progress on the task is monitored.
4.	Field Service Request Closing and Reporting.	When a resource has completed a task, he reports on labor time, materials used, and expenses accrued. The task is closed by the dispatcher or service representative.

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

Task Status Flow

Tasks change status during the field service process of assigning tasks. Depending on the status different actions are possible. Tasks statuses show up in the control tower enabling the dispatcher to keep track of tasks and their status.

Table 3 Seeded Tasks Statuses

Task Status	Behavior	Following Statuses
In Planning	The task is ready for planning or already assigned to a service representative. The planner is still optimizing the schedule and can assign the already assigned task to another service representative.	Assigned/ Canceled

Task Status	Behavior	Following Statuses
Assigned	Task is assigned to a service representative and the schedule is ready to be committed.	Accept/ Reject/ Working/ Completed/ Canceled
Accepted	The task is accepted by the service representative. Reporting on the task is possible.	Reject/ Working/ Canceled
Rejected	The task is rejected by the service representative. The dispatcher can change it back to assigned to enforce 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/ Accept/ Working/ Canceled
Working	The service representative started working on the task. The actual start time is entered, enabling the dispatcher to view progress on the schedule and view predicted start times of tasks scheduled next. Reporting on the task is possible.	Interrupted/ Completed/ Canceled
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 at a later point in time. The service representative can also continue working on the task. Reporting on the task is possible.	In Planning/ Assigned/ Working/ Completed/ Canceled
Canceled	The task is canceled. The dispatcher can assign it to the same representative again or change or to another service representative. Reporting on the task is possible.	In Planning/ Assigned/ Closed
Completed	The task is done and frozen. No updates or reporting on the task is allowed.	Closed
Closed	The field service report for the task is reviewed and pushed to charges. Updates to the installed base and knowledge base are made.	

What is the Control Tower?

The control tower is a one stop planning area where you can plan, dispatch, and monitor tasks for service representatives out in the field. A planner can view all incoming tasks within his or her responsibility and then assign these tasks to create a trip for each service representative. A trip includes all the tasks assigned to 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 dispatching tasks, the control tower allows you to monitor service representative's progress, and report on tasks 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.

In the top region of the control tower screen, you can view all incoming tasks, customer information, planned start and end dates, and actual scheduled times for a selected customer.

Included features are:

- Bolded Tasks. This indicates that a task is ready for planning.
- Advise Button. Opens the Assignment Manager screen so you can assign a single task using selection criteria from either the Assignment Manager or Scheduler.
- Auto-Assign Button. Automatically assigns a task or multiple tasks using the selection criteria from Assignment Manager or Scheduler.

The tab pages below allow you to view trips, schedules, report on tasks, and monitor progress. The following tab pages exist:

- Plan Board
- Gantt
- Map
- Spares
- Statistics

Plan Board Features

The plan board contains a grid populated with the service representatives name, departure and arrival times, scheduled tasks for the day, as well as the customer's address. From the plan board you can:

- View service representatives trips for the day.
- Access service representatives calendars.
- Access service request or task, source details.
- Assign tasks.
- Report on performed tasks.
- Optimize trips.
- Send Messages.

Gantt Features

The Gantt chart view is a quick 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. From the gantt you can:

- View daily schedules with tasks shown in green or red (escalated) bars, travel time transparent, and shifts in yellow.
- View progress on tasks for service representatives.
- View predicted schedules.
- View task description.
- Move tasks from one service representative to another.
- Access service request details.

Map Features

The Map is a quick graphical overview of a service representative's real time location and status. You can also assign tasks to service representatives or view tasks with their location. The date shown for the map is the actual date. From the map you can easily:

- View the location of service representatives.
- View the status of service representatives.
- View the location of tasks.
- Assign tasks.
- Access service request details

Spares Features

The Spares tab enables you to view spares transactions for tasks, as well as move and order spares for tasks. From spares you can easily:

- View spares transactions for a selected task.
- Move and order spares.
- Access the Spares Management application.

Statistics Features

The Statistics tab shows a statistical analyses of field service activities for your organization in a diagram over a period of time. The date range shown and used for representation by default, is two days before the actual date and two weeks ahead of it. The date range is adjustable. From statistics you can:

- Review escalations over a period of time.
- Review owned tasks over a period of time.

Understanding Field Service Report

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 Field Service Report
- How Field Service Report Relates to CRM
- Field Service Report Navigation

Introduction to Field Service Report

A field service report documents information related to a specific task performed at a customer site. Use the Field Service Report screens to record all your day to day activities out in the field. Once the information is collected and captured on the screen, you can update the customer's installed base if necessary and maintain your spares inventory. In addition, use Field Service Report to enter your expenses, labor time, and counter information.

The main features in Field Service Report are:

Materials

The Materials tab records and updates all materials ordered or used while at the customer site. You can record the items used and enter specific materials information, which can be updated in spares, installed base, and charges.

Expenses, Labor, and Counters

You can document expenses accrued during your visit. This can include driving costs and meal expenses. You can also report labor time as well as enter and update counter readings.

How Field Service Report Relates to CRM

Field Service Report is integrated with many other Oracle CRM Applications such as:

Calendar

You can manage your schedule from the Calendar datebook. The datebook contains working hours and task assignment as well as non-available working hours like holidays or sick days. Access Calendar from the Task Summary screen. For more information, see Calendar.

Charges

You can update charges with parts usage, counter information, labor time, and miscellaneous expenses. When the Charges check box is selected, all information related to materials used is transmitted to the Charges database and a final invoice is generated. You cannot edit report information once it has been updated in charges.

Installed Base and Spares Inventory

You can update your spares inventory and a customer's installed base from Field Service Report. You can select the appropriate check boxes from the Field Service Report tab. For more information, see Installed Base and/or Spares.

Interactions

Oracle Interaction History tracks all customer-agent interactions and serves as a repository for the interaction data. You can view the interaction data as well as the Oracle CRM application data associated to the interaction. Access Interactions from Field Service Report tab. For more information, see Interactions.

Notes

Notes provides 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 customer representatives or customers. Once 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 the Field Service Report tab. For more information see, Notes.

Field Service Report Navigation

From the Field Service Report screen, you can access existing field service reports and tasks, view customer information, and task summaries, and create and update field service reports for a completed task.

View general customer and task information at the top of the screen, or navigate to the Service Report Lines region to enter specific information on a completed task.

Quick Menu

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

- Installed Base
- Service Request
- Spares Management

For more information, see Quick Menu.

Using Field Service

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

Provided are two scenarios to take you through the application, for more information, see Choosing a Field Service Scenario.

Choosing a Field Service Scenario

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

- Creating a Schedule

  Use this scenario if you are planning a schedule for a field service representative.

- Monitoring Progress and Managing the Schedule

  Use this scenario if you are managing the daily activities of field service representatives.

Creating a Schedule

Perform the following tasks in the recommended order to create a schedule for your field service representatives:

1. View the plan board.
2. Find Tasks.
3. View Spares.
4. Schedule a Task or Tasks:
   a. Manually.
   b. With help from the Assignment Manager.
   c. Automatically.
5. View the Schedule:
   a. On the plan board.
   b. On the gantt.
6. Recalculate a Service representative’s Trip (Scheduler only).
7. Commit the Schedule.

Monitoring Progress and Managing the Schedule

Perform the following tasks to monitor progress on the schedules and act in order to keep the schedule up to date and accurate.

1. View Status:
   a. On the plan board.

   b. On the gantt.
   c. On the map.
2. View spares.
3. Re-assign a task.
4. Cancel a task.
5. Recalculate a service representatives trip.
6. Create additional tasks.
7. Create a new service request.
8. Report on tasks.
9. Complete a task.
10. View statistics.

Viewing the Plan Board

Use the plan board to view scheduled tasks for a service representative or a group of service representatives. You can also assign tasks, optimize the schedule, and access calendars and service request details.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. Select the Plan Board tab. The tasks and trips for the current day are shown.
3. Click **More** to enlarge the plan board.
4. Select **Date** to change the date to view.
5. Click **Refresh** to repopulate the plan board.
6. Click **Territories** to choose the group or groups of service representatives you want to view on the plan board.
7. Click **Goto Resource** to focus on a specific service representative. The service representatives name is highlighted and visible on the plan board.
8. Right clicking the service representatives name on the plan board brings up a popup menu.
9. Click **Show Calendar** to view the service representatives personal calendar.
10. Click **Recalculate Trip** to optimize a service representatives trip. The Scheduler needs to be installed to perform this task.
11. Right clicking a task brings up a popup menu.
12. Click **Show Source Document** to open the screen the task is created from.
13. Click **Debrief** to report on a performed task. The Field Service Report screen is opened.
14. Click **Send Message** to send a message to another user.
15. Click **Assign Task** to assign a task to the service representative.
16. Click **Return** to decrease the plan board.

Finding Tasks

Use this procedure to populate the control tower with tasks. Once you have populated the control tower with tasks, you can assign them or review them.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Put your cursor in one of the task detail fields in the upper half of the Control Tower.
3. Click **Find**. The Find Tasks screen appears.
4. Enter information to retrieve the kind of tasks you want to view. Check the **Schedulable** box to select only tasks ready for scheduling.
5. Click **Find**. The upper half of the control tower is populated with tasks. Tasks that are shown in bold are schedulable.
6. Select and right click on a service request number to show the service request with details for that particular task.

Viewing Spares

Use spares to view part transaction information for a selected task, access the spares management application, or view detailed information on ordered parts.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Select the Spares tab. The first time the spares tab is selected during a session choose an organization from the list of values that pops up.
3. Click **More** to enlarge Spares.
4. Click **Territories** to choose the group or groups of service representatives you want to view spares for.

5. Click **Goto Resource** to focus on a specific service representative.
6. Select a task from the upper part of the control tower, you don't need to check it. The parts and transactions for the selected task are shown.
7. To view details for a part, click the numbered link in the **Order** column.The Parts Order Entry screen appears.
8. Click **Spares Mgmt** to enter the Spares Management application. The Spares Planner's Desktop screen is opened.
9. Click **Return** to decrease spares.

Scheduling a Task Manually

You can assign a task to a field service representative directly from the plan board or map. Use this procedure to schedule a single task for one or more service representatives.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Populate the control tower with tasks.
3. Check the box next to the task you want to schedule.
4. When you are scheduling a single task for multiple resources, check the **Add** box.
5. There are several options to plan manually:
   - On the Plan Board, select an empty cell in the service representatives trip and click the right mouse button. Click **Assign Task** from the popup menu.
   - On the Map, double click on a service representative of your choice.
6. Click Refresh to repopulate the plan board or map.
7. Repeat this procedure if you are scheduling a single task for multiple resources.

Scheduling with Help from the Assignment Manager

Use this procedure to access the Assignment Manager to assist in assigning a task to a qualified resource. For more information, see Overview of Assignment Manager.

Use this procedure to schedule a single task for one or more service representatives.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Select a task for scheduling by checking it.
3. When you are scheduling a single task for multiple resources check the **Add** box.
4. Click the **Advise** button. The Assignment Manager screen is opened. See Using Assignment Manager for options or click **Help**.
5. Confirm the assignment by clicking **Ok**. The Plan Board and Gantt are refreshed.
6. Repeat this procedure if you are scheduling a single task for multiple resources.

Scheduling a Task or Tasks Automatically

You can schedule a task automatically directly from the plan board. Use this procedure to schedule a task or multiple tasks automatically.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Select a task for scheduling by checking it. Check the **Select All** box to select all tasks at once.
3. Click the **Auto-Assign** button.
4. The Plan Board and Gantt are refreshed.

Viewing the Gantt

Use the Gantt to view progress on the dispatched schedules. A time line is shown to indicate the current date and time.

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). Shifts are indicated in yellow. Use the scroll bars in Resource and ganttchart to view more details or dates.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. Select the Gantt tab.
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 **Refresh** to repopulate the gantt.
6. Click **Territories** to choose the group or groups of service representatives you want to view on the Gantt.
7. Click **Goto Resource** to focus on a specific service representatives schedule. The service representatives name is highlighted and visible.
8. Right click the date or time on the ganttchart header to change the view of the ganttchart.
9. View task description by moving the mouse over a task. A task description is shown.
10. To view task details double click a task. The source document is opened showing the task details. For a service request task the Service Request screen is opened.
11. Click **Scheduled times** to view the schedules send out to the service representatives.
12. Click **Predicted times** to view progress on the schedules. Based on the actual times reported by the service representatives on tasks performed a prediction of the start times of following tasks is shown.

13. Click **Return** to decrease the Gantt.

Viewing the Map

On the map the service representatives are shown in a geographical representation with an easy to view status. Use this procedure to learn the possibilities of using the map.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. Select the Map tab.
3. Enter the user-id/password of the geographical database at the left of the **Init** button.
4. Click **Init**. The last saved geographical area is shown.
5. Optionally you can choose which geographical area you want to view from the drop down list underneath the small map. The small map is always showing an overview of the entire geographical area that is selected.
6. Click **More** to enlarge the Map.
7. Click **Territories** to choose the group or groups of service representatives you want to view on the map. Instant status is shown with a graphical representation for each service representative.
8. Draw a box on the small map to be shown in detail on the large map.
9. Click the **In** and **Out** buttons to zoom in and out on the large map. A box on the small map indicates where you are.
10. Navigate through the small map from the left to the right, and from the top to the bottom by using the arrow buttons. Click **Set** to make the area appear on the large map.
11. Click on a service representative. **Resource name** and **Task details** are shown for the selected service representative.

Note: Double clicking a service representative when a task is checked in the upper half of the control tower, will assign the task to the service representative.

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12. Click **Goto Resource** to focus on a specific service representative. The service representative is centered on the large map. The tasks must have a location to show up on the map.
13. To view a task or tasks on the map select them from the upper half of the control tower by checking them.
14. Click **Show Tasks**. The selected tasks with their location are shown on the map. The service representatives for the selected territories remain visible as well.
15. Double click on a task for details. The Service Request screen is opened showing the Task tab.
16. Click **Clear Tasks** to remove the tasks from the map.

Note: The tasks remain checked in the upper half of the control tower.

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17. Click **Save** to save your current map settings, this is used to display the map the next time you use the map.
18. Click **Refresh** to update the status of the service representatives.
19. Click **Return** to decrease the map.

Recalculating a Service Representatives Trip

Use this procedure to update and optimize a service representatives trip after assigning tasks. 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 the Control Tower.

2. Select the Plan Board.
3. Select the service representatives name and right click it. The popup menu appears.
4. Click **Recalculate Trip**.
5. Perform this procedure again to recalculate a trip for another service representative.

Canceling a Scheduled Task

Use this procedure to cancel a scheduled task. Once a task is canceled you can choose to schedule it again or close it.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. To cancel a task:
   - Click the **Find** button to search for the task. Select a task by checking it and change **Status.**
   - Select the Plan Board or Gantt to debrief on the task.
3. On the Plan Board or Gantt right click on the task you want to cancel. The popup menu appears.
4. Click **Debrief**. The Field Service Report screen is opened.
5. Click **Update Task**.
6. Change **Task Status**.
7. Click **Save**.
8. Return to the Control Tower.
9. Click **Refresh**. Task status is changed on the Plan Board and Gantt.

Re-assigning a Task

Use this procedure to move an already assigned task from one service representative to another.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. Select the Gantt tab.
3. Select a task in the service representatives trip, drag and drop it onto the service representative you want to assign the task to.
4. Click **Undo** to cancel the drag and drop action.

Creating Additional Tasks

Use this procedure to create additional tasks for an existing service request from the Control Tower.

Prerequisites

None.

Steps.

1. Navigate to the Control Tower.
2. To create additional tasks:
   - Select the service request you want to create an additional task for from the upper half of the control tower and right click it. The Service Request screen is opened.
   - Select the Plan Board and right click on a task with corresponding service request number from a service representatives trip. Select S**how Source Document**. The source screen is opened.
3. Click **Help** for more information.

Creating a New Service Request

Use this procedure to create a new service request. This can not be done when working in the Control Tower.

Prerequisites

None.

Steps

1. Navigate to Service Request > Service Requests > Create Service Request. The Service Request screen is opened.
2. Click **Help**.

Reporting on Tasks

Use this procedure to report on performed tasks on labor, parts, expenses, and counter readings. For more information, see also Field Service Report.

Prerequisites

None.

Steps.

1. Navigate to the Control Tower.
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 Field Service Report screen is opened.
5. Click **Help** or follow this link.

Completing a Task

Use this procedure to change the task status to complete from the control tower. This is normally done when reporting on time, material, and expenses in the Field Service Report.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. To complete a task:
   - Click the **Find** button to search for the task. Select a task by checking it and change **Status.**
   - Select the Plan Board or Gantt to debrief on the task.
3. On the Plan Board or Gantt right click on the task you want to complete. The popup menu appears.
4. Click **Debrief**. The Field Service Report screen is opened.
5. Click **Update Task**.
6. Change **Task Status**.
7. Click **Save**.
8. Return to the Control Tower.
9. Click **Refresh**. Task status is changed on the Plan Board and Gantt.

Viewing Statistics

Use this procedure to view an analysis on the performance of your service organization.

Prerequisites

None.

Steps.

1. Navigate to the Control Tower.

2. Select the Statistics tab.
3. Click **More** to enlarge the window.
4. Click **Territories** to choose the group or groups of service representatives you want to view in your statistics.
5. Select a date at **From** and **To** to define a date range for your statistic data to be presented.
6. Choose an option from the drop-down list.
7. Click **Refresh**. The statistic data is presented for the date range defined.

Selecting Territories

Use this procedure to select a group or groups of service representatives. The control tower shows information for the group or groups selected.

Prerequisites

None.

Steps

1. Make a selection from the territories assigned to you.
2. To view territories not assigned to you check the **Show all territories** box.

Committing the Schedule

Use this procedure to change task status for all tasks for a selected date. This is done to commit to the schedule so it get's communicated to the service representatives.

Prerequisites

None.

Steps

1. Navigate to Commit Schedule.
2. Make a selection from the list of values at **From Status**.
3. Make a selection from the list of values at **To Status**.
4. At **Scheduled Date** enter the date you want to commit the schedule for.

5. Click **OK** to change the task status.

Using Field Service Report

This topic group provides process-oriented, task based procedures for using Field Service Report.

The Field Service Report Screen

- Finding a Task
- Viewing Task Summary
- Entering Materials
- Entering Expenses
- Entering Labor
- Entering a Counter Reading
- Updating a Task

Finding a Task

Use the Find Task popup window to search for the task you want.

Prerequisites

None

Steps

1. Navigate to the Field Service Report screen. The Find Task popup window appears.
2. Place your cursor in any of the fields, and select the desired name or number from the list of values.
3. Click **Find**. A list of tasks appears in the Tasks Summary tab.
4. Double-click on a task to populate the Field Service Report screen, or select.

Viewing Task Summary

Using Task Summary, you can view a list of service tasks and service reports and navigate to a detailed report. By using the find window, you can search for tasks or service reports based on resource, task, status, or priority. You can only view tasks that are not closed.

Use this procedure to view the task summary.

Prerequisites

None

Steps

1. Navigate to the Field Service Report screen.
2. Select the Tasks Summary tab. A list of tasks appears.
3. Select a task from the list.
4. Click the **Calendar** button to view the calendar for the resource assigned to that task.
5. Optionally, click **Service Report** to access the Service Report tab.

   In the Service Request tab, all header fields are automatically populated with relevant information such as, resource, task, and customer information.

Entering Material

Materials can include information such as item details, installed base, and additional miscellaneous information related to a field service visit. You can enter materials information at the line level and update inventory, installed base, and charges for a specific line. Use this procedure to enter and update materials information.

Prerequisites

You must create a service report or task.

Steps

1. Navigate to Field Service Report.
2. From the Field Service Report screen, select the Service Reports tab, and then select the Material radio button.

   The Material screen appears with inventory information and several sub tabs.
3. Select the check box next to the Parts In/Out field, and then select either Parts In or Parts Out from the list of values depending on the task completed at the customer site.

   Parts Out refers to the defective part taken out at the customer site.

   Parts In refers to the new part used to replace the defective part.
4. Select a transaction type from the list of values.
5. In the Item Details tab, enter the details related to the item you are taking out or putting in.

   If you replaced a part at the customer site (parts in), the following fields are enabled:

   Issuing Inventory: Select the sub inventory for the item you are putting in a the customer site.

   Issuing Locator: If the part is serialized then select the issuing locator from the list of values.

   If you took a part out at the customer site (parts out), the following fields are enabled:

   - Receiving Inventory: Select the sub inventory for which the item belongs.

- Receiving Locator: If the part is under locator control, then select the receiving locator from the list of values.

  Additional fields such as Rev, Lot, and Serial Num apply only if your part is located under these specific controls.

6. From the Installed Base tab, view part information related to Installed Base. (If you cannot select your part from any of the list of values, see Installed Base for more information.)

   For Parts In:

   - If you put in a new item, then leave all fields empty and a CPID number is automatically generated when you update Installed Base.
   - If there is an existing parent but a new item, a CPID number is automatically generated under the selected Parent when you update Installed Base.
   - If you are replacing the item you put in with an existing item, then choose the item you want to be replaced. A new CPID is generated and the new item falls under the existing parent part.

   For Parts Out:

   - Select the part you are taking out from the list of values.

7. From the Others tab, enter additional material information such as the date the item was replaced, the reason it was replaced, the order number, and the channel of communication, such as the Web, E-mail, or phone.

8. From the Interface Status tab, view the status of your updates.

   This tab indicates whether a line has been successfully updated and accounted for in Charges, Spares, and Installed Base.

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

You must have a task created.

Steps

1. Navigate To Service Report.
2. Select the Expense radio button.
3. Enter your expense information.
4. Save your work.

Entering Labor Time

Use this procedure to enter labor information.

Prerequisites

You must first create a task.

Steps

1. Navigate to Service Report.
2. Select the Labor radio button.
3. Enter labor information.
4. Save your work.

Entering a Counter Reading

A counter records the usage of a machine or product. You can record counter readings taken out in the field in the Counter tab. Use this procedure to enter a counter reading.

Prerequisites

You must first create a task.

Steps

1. Navigate to the Counter tab. You can view the customer, account, account number and address. Make sure this information is correct before proceeding.
2. In the Product field, select your product or machine from the list of values.
3. In the Counter field, enter the counter.
4. Enter additional counter information, such as the unit of measure, type, the reading, and when the reading was taken.

5. Select the reset box if you reset a counter.
6. Enter product and counter descriptions.
7. Enter the serial, lot, and reference numbers and parent product if applicable.
8. Click **Capture Reading**. Your reading is saved.

Updating a Service Report

Once you have created your service report, you can update Installed Base, Charges and Inventory. Use this procedure to update information in the database.

Prerequisites

You must first create a task.

Steps

1. Select the check box next the service report lines you want to update.
2. Select the appropriate boxes (Inventory, Charge, Installed Base) depending on where you want the updated information to go.
3. Click **Update**.

Note: Once you have updated Inventory, Charges, and Installed Base, you cannot make changes in Field Service Report.

Updating the Task Assignment Status

If you are debriefing on a completed task, you may want to update the task assignment status. Use this procedure to update task assignment.

Prerequisites

None

Steps

1. From the Service Report tab, click **Update Task**. The Update Task popup window appears. You can see the initial task status, start and end date, and current status.
2. In the New Status field, select the new task status from the list of values.
3. Click **Save**.

Guidelines

If there is more than one task assignment related to a task, then all task assignments must be closed in order for the task to be closed.

Administering Field Service

Topics in this chapter include:

- Assign Territories to Planner Groups
- Resources Subinventories Assignment
- Generating Shift Tasks
- Profile Options

Assign Territories to Planner Groups

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

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

Options

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

Generate Shift Tasks

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

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

Prerequisites

Setup of shifts in Calendar.

Steps

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

Resources Subinventories Assignment

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

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

Options

Perform these steps in sequential order.

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

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

Profile Options

The following profile options are unique to Field Service.

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

Profile Options

You can set these options in any sequence.

	Option	Description
1.	CSF: Default New tasks status	Default status that is assigned to a new task.
2.	CSF: Default “In planning” task status	Default status that is assigned to tasks that are set to “In planning” in the Field Service Control Tower.

	Option	Description
3.	CSF: Default Assigned task status	Default status that is assigned to tasks that are set to "Assigned" in the Field Service Control Tower.
4.	CSF: Default Cancelled tasks status	Default status that is assigned to tasks that are set to "Canceled" in the Field Service Control Tower.
5.	CSF: Address of the Database machine	Enter the address of the hosting database machine.
6.	CSF: Address of the Map server	Enter the address of the MapXtreme server.
7.	CSF: Database port to receive data	Enter the port number of the hosting database.
8.	CSF: Default travel distance for Time Distance Server	If no geocode exist for a task the value is used as the default travel distance between two tasks. **Note:** When a value is entered this is always used to indicate travel distance and overrules the capability to calculate it with the Time Distance Server.
9.	CSF: Default travel duration for Time Distance Server	If no geocode exist for a task the value is used as the default travel duration between two tasks. **Note:** When a value is entered this is always used to indicate travel duration and overrules the capability to calculate it with the Time Distance Server.
10.	CSF: Last used service area on the map	This value is set automatically to store the last used service area on the map.
11.	CSF: Location Finder Installed	Value set to check if the location finder is installed. It is launched when a location for a task is missing, see profile option CSR: Create location.
12.	CSF: Map Left Top X-coordinate	The top left x-coordinate of the shown area on the Field Service Map. This value is set automatically.
13.	CSF: Map Left Top Y-coordinate	The top left y-coordinate of the shown area on the Field Service Map. This value is set automatically.
14.	CSF: Map Right Bottom X-coordinate	The bottom right x-coordinate of the shown area on the Field Service Map. This value is set automatically.
15.	CSF: Map Right Bottom Y-coordinate	The bottom right y-coordinate of the shown area on the Field Service Map. This value is set automatically.

	Option	Description
16.	CSF: Resource progress delay margin	Add a value for the period of time, minutes, a resource is allowed to be late in his trip before it is escalated. This affects the instant shown status of the resources on the Field Service Map.
17.	CSF: SID of the database	Enter the database name.
18.	CSF: Selected territories	This value is set automatically to store the territories selected and show them to the planner when the control tower is started.
19.	CSF: Web server address where the images are stored for the map	Enter the address of the web server where the images are stored. The images are used to show instant status of the resource on the Field Service Map.
20.	CSF: Time distance server calculation factor	If the factor is set the Time Distance Server calculates travel distance and duration faster but less accurate.
21.	CSF: The unit of measure for hour	The setting of the unit of measure for hours must be entered and correspond with the MTL_UNITS_OF MEASURE. Default setting is HRS (hours).
22.	CSF: The unit of measure for minutes	The setting of the unit of measure for minutes must be entered and correspond with the MTL_UNITS_OF MEASURE. Default setting is MIN (minutes).