Oracle® Field Service/Laptop

Installing Oracle Field Service/Laptop

Release 11*i* (11.5.2)

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Installation Overview

This document describes the installation of the Oracle Field Service/Laptop application, Release 11*i* (11.5.2), and related components.

Topics Include

- System Architecture
- Installation Requirements
- Installing Oracle Field Service/Laptop

Intended Audience

This document is intended for Systems Administrators or other IT professionals who are responsible for installing and maintaining Oracle Field Service/Laptop. We recommend you have experience in database administration.

Related Documents

For more information, see the following manuals:

- *Installing Oracle Applications 11i*
- *Oracle Applications Concepts*
- *Installing and Administering CRM Gateway for Mobile Devices*
- *Oracle Field Service Concepts and Procedures*
- *Oracle Field Service/Laptop Concepts and Procedures*

We recommend checking Metalink for any updates on already released documentation.

System Architecture

This installation guide covers the installation and configuration of Oracle Field Service/Laptop, Release 11*i* (11.5.2) on the mobile device using the Web to Go publishing wizard. The following diagram shows the components of an operational Mobile Field Service installation. The letter next to the component definitions relates to the letter on the diagram.
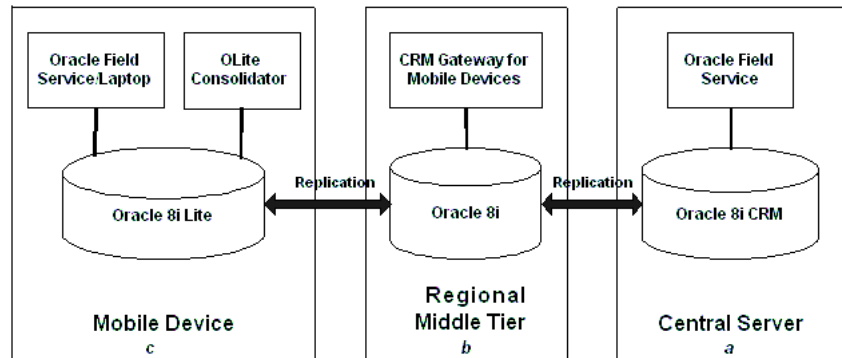
a. Oracle Field Service

   Oracle Field Service is a one stop planning area where you can plan, dispatch, and monitor tasks for service representatives out in the field.

   It is assumed that you have installed and configured Oracle Field Service on the Oracle Applications Enterprise Server (Central Server) prior to the installation of Oracle Field Service/Laptop.

b. CRM Gateway for Mobile Devices (MDG)

   The CRM Gateway for Mobile Devices, also known as the Synchronization Server, synchronizes data between the Oracle CRM enterprise database (Oracle 8*i* CRM) and the Oracle mobile client database (Oracle 8*i* Lite). This is done wired (HTTP) or wireless (Nettech).

   The CRM Gateway for Mobile Devices must be installed and configured prior to the installation of Oracle Field Service/Laptop.

c. Oracle Field Service/Laptop

   Oracle Field Service/Laptop is a channel product of the Oracle Field Service suite. The Oracle Field Service/Laptop application works independently from the corporate network and changes are communicated to the Oracle CRM enterprise database, either over a phone line, a LAN/WAN, or by wireless connection.

Installation Requirements

This section describes hardware, software, and other installation requirements for Oracle Field Service/Laptop.

Hardware Requirements

Hardware	Requirement
CRM Gateway for Mobile Device NT-server:	
CD-ROM drive	To install Oracle Field Service/Laptop, or the ability to access a CD-ROM drive over a network.
Laptop device:	
Computer	IBM-compatible, Pentium II 233 MHz or better
Hard Drive	500 MB free space
Monitor	256 color display
RAM	128 MB
Miscellaneous	- Serial Port, Internet connection - Mouse or pointer device - MOBITEX Network compatible PCMCIA card or MOBITEX Modem Note: The network card may vary depending on your network connection.

Software Requirements

Software	Requirement
Operating System	For multi-byte languages: - Windows NT 4.0 (Service Pack 5) For all other languages: - Windows NT 4.0 (Service Pack 5), Windows 95, or Windows 98
Browser	Microsoft Internet Explorer 5.01 (5.00.2919.6307) used to display field service reports and Help in the Oracle Field Service/Laptop application.

Additional Requirements

- A user account for the service representative needs to be created on the CRM Gateway for Mobile Devices, refer to the *CRM Gateway for Mobile Devices Installation and Administration Guide.*

- After installing all of the required products, you must reboot your machine in order to run the components properly. You must subscribe to BellSouth Wireless Network's MOBITEX Network for their MOBITEX wireless data. Consult your network specialist or system administrator for more information.

Installing Oracle Field Service/Laptop

This section describes the prerequisites and procedures for installing Oracle Field Service/Laptop.

Topics include:

- Installation Process Overview
- Step 1: Loading Oracle Field Service/Laptop onto the MDG
- Step 2: Downloading and Installing ConsolidatorClient, Oracle 8i Lite, and Nettech
- Step 3: Using the Consolidator to Deploy the Oracle Field Service/Laptop Application onto the Mobile Device
- Step 4: Installation Procedure for Oracle Field Service/Laptop
- Step 5: Configuration Procedure for Oracle Field Service/Laptop

Installation Process Overview

An overview of the installation process, necessary equipment, and location of installation is shown in the following diagram. Perform these steps in sequential order.

Step	Action	Performed At	CD Required
1.	Use the Web-to-go Publishing Wizard to load the Oracle Field Service/Laptop application onto the MDG	MDG	Field Service Laptop/Palm CD
2.	Mobile User uses URL to download and run setup.exe to install: ■ Consolidator ■ Oracle8*i* Lite ■ Nettech ■ Bootstrap (N/A for Laptop)	Client PC	N/A
3.	Mobile User uses consolidator UI to deploy application onto the device	Client PC	N/A
4.	Run setup.exe to install ■ Oracle Field Service/Laptop	Client PC	N/A
5.	Configure the installation of the Oracle Field Service/Laptop application	Client PC	N/A

Step 1: Loading Oracle Field Service/Laptop onto the MDG

This section describes how to load Oracle Field Service/Laptop onto the CRM Gateway for Mobile Devices using the Web-to-go Publish Wizard.

1. Insert the gold CD into your CD-ROM drive.

2. At the command prompt, type the following to launch the Web-to-go Publish Wizard:

   ```
   wtgpack
   ```

   The Publish Wizard appears and, by default, displays the Welcome panel. Only use the Application and Files panel. The other panels are not applicable.

3. On the Welcome panel, choose **Create a new application**.

   > **Note:** Choose **Edit** when you have already loaded the Oracle Field Service/Laptop aplication onto the MDG before.

4. Use the Application panel to name the application and to specify where you want to store it on the Web-to-go server.

5. Enter the following values into the fields on the panel:

Field	Value
Application Name	Field Service/Laptop
Virtual Path	/FieldServiceLaptop
Description	Field Service/Laptop
Application Classpath	N/A
Default Page	N/A
Local Application Directory	<cd-drive>:\
Icon	N/A

6. Click **Next** in the Files panel list to see a list of all the files under <cd-drive>:\.

   Choose **setup.exe** in the file panel and remove all the other files.

7. Keep clicking the **Next** button until the Finish button appears.

8. Click **Finish** to complete the application registration.

The Application Definition Completed window appears with the following options:

- Create Files
- Publish the current application
- Restart Wizard

9. Choose **Publish the current application**.

    The Publish the Application window appears.

10. Enter the following values into the fields

Field	Value
Web-to-go Server URL	http://<web-to-go server IP>
Web-to-go username	administrator
Web-to-go password	admin
Repository Directory	/FieldServiceLaptop

11. Check the **Public** checkbox.

12. Click **OK**.

    The Publish Wizard uploads the application to the Web-to-go repository.

13. When the upload is completed, click **Exit** to quit the program.

Step 2: Downloading and Installing ConsolidatorClient, Oracle 8*i* Lite, and Nettech

This section describes how to install the iConnect Consolidator client (Oracle8*i* Client Library) and ensure that your browser is configured to connect to the CRM Gateway for Mobile Devices (Synchronization Server).

This configuration includes installing the Oracle8*i* Lite database and the nettech component for wireless communication.

The ConsolidatorClient enables you to retrieve the setup.exe for the Oracle Field Service/Laptop application from the Web-to-go repository later on.

Prerequisites

Synchronization Server name for downloading.

Steps

1. Start your Web browser and connect to the Synchronization Server by typing the following URL:

    http://<server_name>/setup

    > **Note:** Replace the <server_name> variable with the host name of the Synchronization Server.

2. See if there are changes or updates for the system configuration you are working with.

3. If you are using Netscape, choose a location to save the setup program and click **OK**. In Windows Explorer, double-click setup.exe to run the setup program. If you are using Internet Explorer, run the setup program from your browser window.

    Once started, the setup program prompts you to provide an install directory.

4. Choose a directory, for example, C:\ora_HOME, and click **OK**. The setup program downloads all the required components. If you are using a Win32 machine, skip steps 5 and 6. You have completed the Win32 client-side installation.

5. After you download the necessary files, the setup program prompts you to select a Palm user, ignore this.

6. Set the COM_PORT parameter in the [MOBITEX] section of rfmlib.ini to the port where the modem is attached (usually COM1 or COM2).

The rfmlib.ini file specifies which port is assigned to the modem. This is necessary for a client and server running Win32.

Step 3: Using the Consolidator to Deploy the Oracle Field Service/Laptop Application onto the Mobile Device

This procedure describes how to use the ConsolidatorClient to deploy the setup.exe to install the Oracle Field Service/Laptop application onto the Mobile Device.

Prerequisites

- The Oracle Field Service/Laptop applications needs to be published.

- A user account for the service representative on the CRM Gateway for Mobile Devices needs to be created.

Steps

1. Start the Consolidator program by doubleclicking consolidatorclient.exe from subdirextory C:\ora_HOME\bin\.

2. Enter the following values into the fields:

Field	Value
UserName	MDG username for service representative
Password	MDG password for service representative
http://	<Synchronization ServerIP>

3. Click **Apply**.

4. Click **Sync**.

5. Click **OK** when the synchronization process has finished.

Step 4: Installation Procedure for Oracle Field Service/Laptop

The following procedure installs the Oracle Field Service/Laptop application on the Mobile Device.

Prerequisites

None

Steps

1. Click **setup.exe** from the subdirectory C:\ora_HOME\OLDB40\ .

   The setup program initializes and a Welcome dialog box appears.

2. Click **Next** to proceed.

   The License Agreement screen appears.

3. Read the License Agreement carefully, and then click **ACCEPT** to accept the terms of the license agreement.

   The Select Installation Directory screen appears.

4. By default C:\Program Files\Oracle Field Service Laptop is used as the installation directory for the files and folders created.

   - Click **Next** to proceed

     or

   - Click **Browse** to choose another installation directory or create a new installation directory. When you return to the Select Installation Directory screen, click **Next**.

     The Backup Replaced Files screen appears.

5. Select **No** or **Yes** to backup replaced files during installation.

   - When No was selected click **Next,** the Ready to Install screen appears. Proceed with step 7.

   - When Yes was selected click **Next**, the Select Backup Directory screen appears. Proceed with step 6.

6. By default the C:\Program Files\Oracle Field Service Laptop\Backup directory is created to store the replaced files.

   - Click **Next** to proceed

     or

   - Click **Browse** to choose another backup directory or create a new backup directory. When you return to the Select Backup Directory screen, click **Next**.

The Ready to Install screen appears.

7. Click **Install** to start the installation of the Oracle Field Service/Laptop application.

    The following directories are created in the installation directory under ...\Oracle Field Service Laptop:

    - Backup
    - Jobsheet
    - Help
    - Laptop
    - System32

    > **Note:**   A log file `Install.log` of the installation is found in the installation directory under ...\Oracle Field Service Laptop.

8. Click **Finish** to complete the installation.

Step 5: Configuration Procedure for Oracle Field Service/Laptop

To establish communication with the Synchronization Server, configure the Oracle Field Service/Laptop application on the Mobile Device according to the following procedure.

Prerequisites

None.

Steps

1. Click the **Start** button from the task bar.

2. Select **Program**s.

3. Select **Oracle Field Service Laptop** > **Oracle Field Service Lapto**p. The login dialog box appears

4. Enter service representatives Username and Password.

5. Click **OK**.

6. Click the **Option Form** button from the toolbar.

    The Options screen is opened.

7. Select the Communications tab.

8. Enter the following values into the fields:

Field	Value
Server Address	http://<Synchronization Server IP>
Server Port	<Synchronization Server Port Number>
Num of retries	Number of retries to synchronize data with the Synchronization Server
Retry timeout	Number of seconds between each retry
User ID	MDG username for service representative
Password	MDG password for service representative

9. Choose a Connection Type:

■ Check **Radio** for wireless communication.

- Check **Phone** for wired communication.

This completes the configuration of the Oracle Field Service/Laptop application, necessary to enable the communication with the Oracle Field Service server.

For more information on the setup of the Oracle Field Service/Laptop application, refer to *Oracle Field Service Concepts and Procedures* the *Implementation Overview of Oracle Field Service/Mobile* section.