Oracle® Field Service/Palm™ Devices

Installing Oracle Field Service/Palm™ Devices

Release 11*i* (11.5.2)

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Installation Overview

This document describes the installation of the Oracle Field Service/Palm^{TM} Devices application, Release 11*i* (11.5.2), and related components.

Topics Include

- System Architecture
- Installation Requirements
- Installing Oracle Field Service/Palm^{TM} Devices

Intended Audience

This document is intended for Systems Administrators or other IT professionals who are responsible for installing and maintaining Oracle Field Service/Palm^{TM} Devices. 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/Palm Concepts and Procedures*

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

System Architecture

This installation guide covers the installation and configuration of Oracle Field Service/Palm^{TM} Devices, 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.
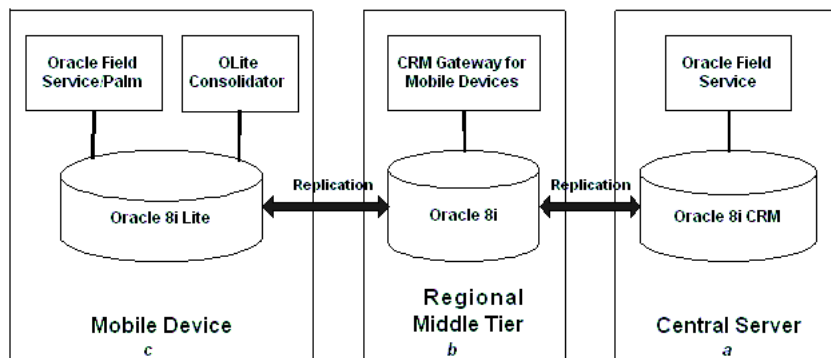
a. Oracle Field Service

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

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/Palm^{TM} Devices.

c. Oracle Field Service/Palm^{TM} Devices

Oracle Field Service/Palm^{TM} Devices is a channel product of the Oracle Field Service suite. The Oracle Field Service/Palm^{TM} Devices 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/Palm™ Devices.

Hardware Requirements

Hardware	Requirement
On Desktop PC:	
Computer	IBM-compatible, Pentium I or better
Hard Drive	50 MB free space
Other Drives	CD-ROM drive, or the ability to access a CD-ROM drive over a network.
Monitor	256 color display
RAM	32 MB
Miscellaneous	■ Serial Port, Internet connection ■ Mouse or pointer device
On Palm Device:	
RAM	2 MB of available RAM
Handheld device	■ 3Com Palm III, IIIe, IIIx, V, and VII ■ Symbol SPT 1500 ■ Symbol SPT 1700 series ■ IBM WorkPad ■ Qualcomm pdQ Smartphone ■ Handspring Visor
Miscellaneous	MOBITEX Modem

Software Requirements

Software	Requirement
On Desktop PC:	
Operating System	Windows NT 4.0 (Service Pack 5), Windows 95, or Windows 98
Palm Desktop	Install Tool
Browser	Microsoft Internet Explorer or Nestcape Communicator.
On Palm Device:	
Operating System	Palm OS 3.0, 3.1, 3.2, or 3.3

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/Palm^{TM} Devices

This section describes the prerequisites and procedures for installing Oracle Field Service/Palm^{TM} Devices.

Topics include:

- **Installation Process Overview**
- **Step 1: Loading Oracle Field Service/Palm^{TM} Devices onto the CRM Gateway for Mobile Devices**
- **Step 2: Downloading and Installing Consolidator, Oracle 8i Lite, Nettech, and Bootstrap**
- **Step 3: Fulfilling Remote Access Requirements**
- **Step 4: Performing a Hotsync of all iConnect Palm Components**
- **Step 5: Configuring Windows Remote Application Server (RAS)**
- **Step 6: Creating a RAS User Account for the Palm Device**
- **Step 7: Configuring the Palm Device**
- **Step 8: Configuring and Executing the iConnect Consolidator Client on Palm Computing Platform Devices**
- **Step 9: Configuring the Oracle Field Service/Palm^{TM} Devices Application**

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/Palm^{TM} Devices application onto the MDG	MDG	Field Service Laptop/Palm CD
2.	Mobile User uses URL to download and run setup.exe to install: ■ Consolidator (N/A for Palm) ■ Oracle8*i* Lite (N/A for Palm) ■ Nettech (N/A for Palm) ■ Bootstrap (downloaded only if Palm desktop is installed on PC)	Client PC (MDG)	N/A
3.	Fulfill Remote Acces Requirements	Client PC/Palm	N/A
4.	Hotsync all iConnect Palm Components, including the Bootstrap.	Client Palm	N/A
5.	Configure the Windows remote Application Server (RAS)	Client PC (MDG)	N/A
6.	Create a RAS USer Account for the Palm Device	Client PC (MDG)	N/A
7.	Configure the Palm Device	Client Palm	N/A
8.	Configure and Execute the iConnect Consolidator client	Client Palm	N/A
9.	Configure the installation of the Oracle Field Service/Palm^{TM} Devices application	Client Palm	N/A

Step 1: Loading Oracle Field Service/Palm^{TM} Devices onto the CRM Gateway for Mobile Devices

This section describes how to load Oracle Field Service/Palm^{TM} Devices 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/Palm^{TM} Devices 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/PalmTM Devices
Virtual Path	/FieldServicePalm
Description	Field Service/PalmTM Devices
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 **FieldService.prc** 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	/FieldServicePalm

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 Consolidator, Oracle 8*i* Lite, Nettech, and Bootstrap

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 Nettech component for wireless communication. These components are installed automatically but are of no use for the installation of the Oracle Field Service/Palm^{TM} Devices application.

The Bootstrap for Palm is downloaded in this procedure and installed on the Palm device in Step 4: Performing a Hotsync of all iConnect Palm Components.

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:\orant, and click **OK**. The setup program downloads all the required components.

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

> **Note:** If the Palm desktop is not installed, the setup
> program will prompt you to install it and then terminate.
> Once you have installed the Palm desktop and created a
> user, run the setup program from C:\ora_
> HOME\icpalm\palminst.exe.

6. When you successfully create a Palm user, the setup program informs
    you that the components are successfully installed and will be
    uploaded with the next hotsync.

Step 3: Fulfilling Remote Access Requirements

Before you set up the Palm client, you must fulfill the following requirements:

- Remote access and the Palm network must be configured for 19200 baud rate.

When you have satisfied the setup requirements, proceed to "Step 4: Performing a Hotsync of all iConnect Palm Components".

Step 4: Performing a Hotsync of all iConnect Palm Components

1. Perform a Hotsync of all iConnect Palm components. This installs all of the iConnect client modules for Palm onto the Palm Device.

> **Note:** Oracle's installation mechanism does not use the Palm Desktop Install tool. See the Palm documentation for more information.

Step 5: Configuring Windows Remote Application Server (RAS)

Replicating with the Palm Computing Platform using Scout or HTTP requires the TCP/IP communication protocol. Palm uses serial lines for connection to the network. This step provides instructions for enabling TCP/IP communications for handheld devices using Windows NT RAS.

Perform this procedure to enable TCP/IP communications between handheld devices and your Windows NT server using Windows NT RAS.

Prerequisites

None.

Steps

1. In the Windows Control panel, double-click the **Network** icon.

2. Click the **Add** button in the Services tab of the Network window.

3. Select Remote Access Service and then click the **OK** button.

4. Insert the Windows NT CD-ROM into the CD-ROM drive and specify the location where you want the setup program to search for existing Windows NT RAS files. Click the **Continue** button. The setup program copies the Windows NT RAS files into the appropriate directories. If the setup program fails to detect a modem, it prompts you to add a modem.

5. Click the **Yes** button and enter the required information to install a modem.

   The Add RAS Device window appears.

6. Select COM1-Dial-Up Networking Serial Cable from the drop-down list and click the **OK** button.

   The Remote Access Setup window appears.

7. Under Port, select COM1 and click the **Configure** button.

   The Configure Port Usage window appears.

8. Select the "Receive calls only" radio button and click the **OK** button.

9. Click the **Network** button in the Remote Access Setup window.

   The Network Configuration window appears.

10. Select TCP/IP and click the **OK** button.

    The RAS Server TCP/IP Configuration window appears.

11. Select **Entire Network** and **Use Static Address Pool**.

> **Important:** You must ensure that the TCP/IP addresses in your selected range are not already in use by other computers in your network.

12. You can specify a range of TCP/IP addresses for multiple devices. Enter the beginning of a TCP/IP address range in the Begin field and enter the ending of a TCP/IP address range in the End field.

    The range should be equal to the number of clients plus 1. For example, if you have fifty devices you could enter the following range:

    ```
    Begin: 10.1.0.1
    End: 10.1.0.51
    ```

13. Click the **OK** button.

14. In the Network Configuration window, select Any Authentication Including Clear Text, and click the **OK** button. Click the **Continue** button.

    The Setup Message window appears. Click the **OK** button.

15. In the Network window, click the **Close** button.

    The Network Settings Change window appears. Click the **Yes** button.

16. Once the system reboots, click the **Services** icon in the Windows Control Panel.

    The Services window appears.

17. Select Remote Access Server and click the **Startup** button.

18. Select Automatic and click the **OK** button. Click the **Close** button.

19. From the Windows Start menu select Administrative Tools and then select User Manager.

    The User Manager window appears. Proceed to "Step 6: Creating a RAS User Account for the Palm Device".

Step 6: Creating a RAS User Account for the Palm Device

Proceed with the procedure started in Step 5: Configuring Windows Remote Application Server (RAS) to create a RAS User Account to enable replication.

1. Select New User from the User menu.

    The New User window dialog appears.

2. Enter a user name, password, and password confirmation in the required fields.

3. Select Password Never Expires.

4. Click the **Dial-In** button.

    The Dial-In Information dialog appears.

5. Select Grant Dial-In Permission to User. Click the **OK** button.

6. Click the **OK** button to exit the New User dialog.

7. Exit the User Manager screen.

8. From the Windows Start menu select Administrative Tools and then select Remote Access Administration.

    The Remote Access Admin window appears.

9. Verify that the new RAS user is granted remote access permission and click the **OK** button.

Step 7: Configuring the Palm Device

To configure HTTP as the transport mechanism for Palm use one of the following procedures:

- For Palm OS 3.0, 3.1, or 3.2
- For Palm OS 3.3

For Palm OS 3.0, 3.1, or 3.2

1. In the Preferences screen of the Palm Computing Platform device, select **Modem** from the menu.

   The Preferences screen appears.

2. Verify that the Speed is set to 19200 bps.

3. Select **Network** from the menu.

   The Preferences screen appears.

4. Enter the required information in the fields of the Preferences screen:

Field	Value
Service	Windows NT RAS
User Name	The user's name
Password	The user's password
Phone	00
End	No information required

5. Tap the **Details** button.

   The Details dialog appears.

6. Ensure that the Connection Type is set to PPP.

7. Ensure that for IP Address: Automatic is selected.

8. Tap the **Script** button.

   The Log in Script dialog appears.

9. Enter the following:

Field	Value
Send CR	no information required
Delay	1
Send	CLIENT

Field	Value
Wait For	CLIENTSERVER
End	no information required

10. Tap the **OK** button to close the Log in Script dialog.

11. Tap the **OK** button again to close the Details dialog.

12. Place the device in the HotSync cradle.

13. Tap the **Connect** button to test the connection. If the PPP connection is successful, the device is ready for data synchronization.

For Palm OS 3.3

1. In the Preferences screen of the Palm Computing Platform device, select **Connection** from the menu.

   The Preferences screen appears.

2. Tap **New**.

   The Edit screen appears.

3. Enter the following:

Field	Value
Name	HTTP
Connection Method	Serial to PC

4. Tap **OK** to close the Edit screen.

5. Tap **OK** to close the Preferences screen.

6. Select **Network** from the menu.

   The Preferences screen appears.

7. Enter the required information in the fields of the Network Preferences screen:

Field	Value
Service	Windows RAS
User Name	The user's name
Password	The user's password
Connection	HTTP
	Note: Value entered at step 3 in Name field.

Field	Value
End	No information required

8. Tap the **Details** button.

   The Details dialog appears.

9. Ensure that IP Address: Automatic is selected.

10. Tap the **Script** button.

    The Log in Script dialog appears.

11. Enter the following:

Field	Value
Send CR	no information required
Delay	1
Send	CLIENT
Wait For	CLIENTSERVER
End	No information required

12. Tap the **OK** button to close the Log in Script dialog.

13. Tap the **OK** button again to close the Details dialog.

14. Place the device in the HotSync cradle.

15. Tap the **Connect** button to test the connection. If the PPP connection is successful, the device is ready for data synchronization.

Step 8: Configuring and Executing the iConnect Consolidator Client on Palm Computing Platform Devices

Use this procedure to configure the iConnect Consolidator client on the Palm Device.

This procedure installs the Oracle Field Service/Palm™ Devices application and the database on the Palm Device.

Prerequisites

None

Steps

1. Start the iConnect Consolidator (consolidatorClient.prc) on the handheld device.

   The iConnect Consolidator Sync screen appears.

2. Enter the following values in the fields:

Field	Value
User Name	iConnect Consolidator client user name. This must be written in uppercase.
Password	iConnect Consolidator client password. This field is case sensitive.
Change	Leave this check box unselected.
Save Password	Select this check box to save the iConnect Consolidator client password.
http://\<machine.IP\>/Consolidator	Enter the HTTP listener machine's IP address. The complete URL http://machine.IP/webtogo/Consolidator is not displayed on the device screen. It is not necessary to enter "/webtogo" after the machine IP address.
Use Proxy	Select if appropriate.

3. Tap the **Apply** button.

4. Tap the **Sync** button.

   A progress bar indicates the completion of each synchronization task: composing, sending, receiving, and processing. If synchronization executes successfully, the synchronization Success screen appears.

If synchronization fails, an error message appears. To determine the cause of a failed synchronization, the server administrator can view tracing information on the Synchronization Server.

Step 9: Configuring the Oracle Field Service/Palm^{TM} Devices Application

To establish communication with the Synchronization Server, configure the Oracle Field Service/Palm^{TM} Devices application on the Mobile Device according to the following procedure..

1. Tap the **Applications** icon on the Palm device to display the application picker.

2. Tap the **Field Service** icon from the application launcher.

   The first time the Oracle Field Service/Palm^{TM} Devices application is started the User Information screen is opened automatically displaying the username.

3. For wired communication ignore this screen and tap **OK**. To enable wireless communication enter password and the following information.

4. Tap **Packet Radio** or **Phone**.

5. Enter the modem number of the CRM Gateway for Mobile Devices at Address.

6. Enter **Number of Retries** for synchronizing data.

7. Enter number of seconds between each retry at **Retry Timeout**.

8. Tap **OK**.

9. To modify this information tap **I**.

10. Tap **User**.

This completes the configuration of the Oracle Field Service/Palm^{TM} Devices application, necessary to enable the communication with the Oracle Field Service server.

For more information on the setup of the Oracle Field Service/Palm^{TM} Devices application, refer to *Oracle Field Service Concepts and Procedures* the *Implementation Overview of Oracle Field Service/Mobile* section.