Oracle® Oracle Field Service/Palm™ Devices

Implementation Guide

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Implementing Oracle Field Service/Palm™ Devices

This document provides descriptions of the setup and configuration tasks required to implement the application successfully.

Topics covered are:

ORACLE®

Implementation Overview of Field Service/Palm™ Devices

Before setting up Field Service/Palm™ Devices, you must install and fully implement these Oracle applications or components:
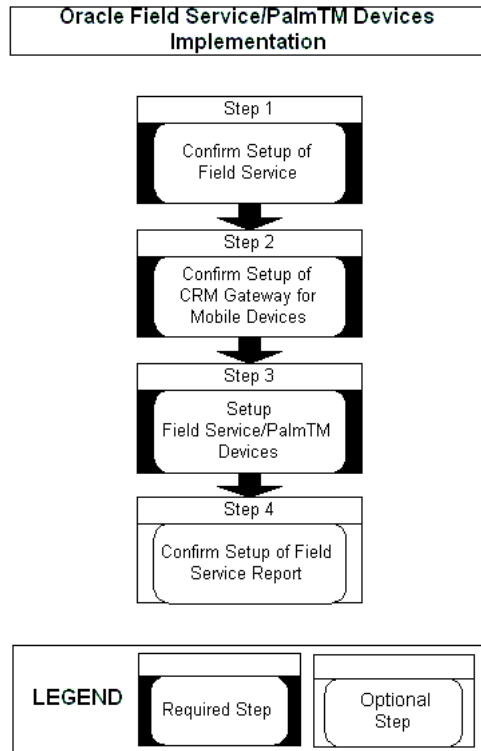
- Oracle Field Service

- CRM Gateway for Mobile Devices

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

The implementation tasks described here are tasks that are necessary to use the additional functionality included with Field Service/Palm™ Devices.

Implementing Flowchart

The following flow chart shows the recommended order:

Oracle Field Service/PalmTM Devices Implementation

Step 1
Confirm Setup of Field Service

Step 2
Confirm Setup of CRM Gateway for Mobile Devices

Step 3
Setup Field Service/PalmTM Devices

Step 4
Confirm Setup of Field Service Report

LEGEND
Required Step
Optional Step

Implementing Checklist

Complete the following implementation steps in sequential order.

Step	Required	Step Title
1.	Yes	Confirm Setup Oracle Field Service
2.	Yes	Confirm Setup CRM Gateway for Mobile Devices
3.	Yes	Setup Field Service/Palm^{TM} Devices on the CRM Enterprise Database
4.	Yes	Confirm setup of Field Service Report

Implementing Steps

Perform the following implementation steps in sequential order:

Step 1: Confirm Setup of Oracle Field Service

Make sure Oracle Field Service is fully implemented and setup as described in *Implementing Oracle Field Service*.

Step 2: Confirm Setup CRM Gateway for Mobile Devices

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

Step 3: Setup Field Service/Palm^{TM} Devices on the CRM Enterprise Database

Make sure you setup Field Service/Palm^{TM} Devices as described in Setting Up Field Service/Laptop and Field Service/Palm^{TM} Devices on the CRM Enterprise database This step involves the following tasks:

- Configuration Parameters
- Resources Subinventories Assignment

Step 4: Confirm Setup of Field Service Report

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

Setting Up Oracle Field Service/Laptop and Oracle Field Service/Palm[TM] Devices

There is a combined set of setup screens to configure the Oracle Field Service/Laptop application and the Oracle Field Service/Palm[TM] Devices application. This is indicated on the setup screen with separate option possibilities. The screens and a description are listed in the table below. Clicking the setup screen name will take you to a task description of the setup screen.

Setup Screen	Required for Laptop	Required for Palm	Description
Agenda Layout	V		Change the agenda layout to your own preference by showing/hiding columns, rearranging the display of the columns, and change header names.
Configuration Parameters			Within Parameters you have five tabs:
■ General tab	V		To define display of progress clock.
■ Agenda tab	V	V	To define up to what point service representatives are allowed to make changes to their agenda, and to register car mileage.
■ Parts tab	V		To define part related options.
■ SR Explorer tab	V		To define service representatives right to edit or add tasks or service requests.
■ Messages tab	V	V	To define send mail options.
■ Buttons tab	V		To configure the Dashboard buttons
User Defined Queries	V		It is possible to create your own queries and add them to the standard Oracle Field Service/Mobile tables. These queries can be used in the Service Request Explorer, Views, and Field Service Report to present information the way you would like it to appear.
Resources Subinventories Assignment	V	V	Used to connect resources to sub inventories.
Field Service Report Types	V		Define the name of the Field Service Report you want to create.

Setup Screen	Required for Laptop	Required for Palm	Description
Field Service Report Manager	V		Used to customize the created Field Service Report types and decide which ones are presented on the service representatives laptop.

Setting up Configuration Parameters

From the Configuration Parameter set up screen you can set up the following system parameters:

- Agenda
- Messages

Agenda tab

The agenda tab is used to define up to what point service representatives are allowed to make changes to their agenda, and to register car mileage.

Options

You can set these options in any sequence.

Step	Option	Description
1.	Show Field Service Report when service representative completes task	Select to open the Field Service Report window automatically when a service representative marks a task as completed.
2.	Allow changes to a completed task	Select to enable the service representative to edit a task when task status has been marked as completed. When deselected this option can prevent conflicts with third party products that do not allow updates to completed tasks.
3.	Allow changes to Agenda's in past	Select to make service requests and tasks that were scheduled in the past reappear in the Agenda until the tasks are completed or canceled.
4.	Days to look back for not started tasks	Decide for how many days you want the not completed or canceled service request and tasks reappear in your agenda.
5.	Round-off time	Use this to round off the times that service representatives entered. The start time is rounded off to the nearest interval backward in time and the end time to the nearest interval forward in time.

Step	Option	Description
6.	Agenda and mail refresh wait time	Specify the number of seconds the Agenda should wait before refreshing the screen. This can help with performance and speeding up the system
7.	Mileage unit of measure	Must be set to match mileage system
8.	register of car mileage: area	To prompt the service representative to register the car mileage on the specified actions: Start of day, Finish of day, Start of task, Finish of task.

Messages tab

The messages tab is used to define send message options.

Options

You can set these options in any sequence.

Step	Option	Description
1.	Send message: All OMFS users	Select to enable the service representative to send messages to all Oracle Field Service/Mobile users.
2.	Send message: Service representatives in group	Select to enable the service representative to send messages to service representatives that are assigned to the same group.
3.	Beep when service representative receives mail	Select to make a beep sound go off when a new message arrives at the service representatives mailbox.

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.