Oracle® Field Service/Laptop

Installation Guide

Release 11*i*

April 2001

Part No. A87357-02

1 Installation Overview

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

Topics Include:

- System Architecture

- Installation Requirements

- Installing Oracle Field Service/Laptop

1.1 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.

1.2 Related Documents

For more information, see the following manuals:

- *Installing Oracle Applications 11i*

- *Oracle Applications Concepts*

- *Oracle CRM Gateway for Mobile Devices Implementation Guide*

- *Oracle Field Service Concepts and Procedures*

- *Oracle Field Service/Laptop Concepts and Procedures*

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

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2 System Architecture

This installation guide covers the installation and configuration of Oracle Field Service/Laptop, Release 11*i* 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.
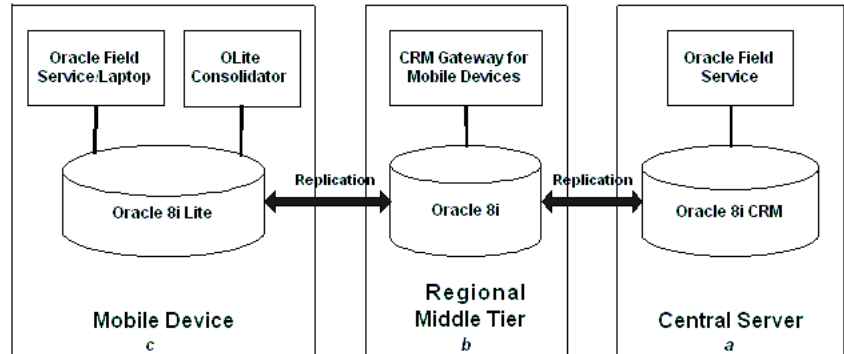
  a. Oracle Field Service

     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).

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> **Note:** The CRM Gateway for Mobile Devices must be installed and configured prior to the installation of Oracle Field Service/Laptop. See *Oracle CRM Gateway for Mobile Devices Implementation Guide.*

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, or a LAN/WAN.

3 Installation Requirements

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

3.1 Hardware Requirements

Hardware	Requirement
CRM Gateway for Mobile Devices 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 higher
Disk Space	500 MB
Monitor	256 color display
RAM	128 MB
Miscellaneous	■ Serial Port, Internet connection ■ Mouse or pointer device

3.2 Software Requirements

Software	Requirement
Laptop device:	
Oracle 8*i* Lite	Installed at Step 2 of this installation document when the CRM Gateway for Mobile Devices has been installed and implemented correctly.
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, Windows 98, or Windows 2000.
Browser	Microsoft Internet Explorer 5.01 (5.00.2919.6307), or 5.5 (5.50.4522.1800), used to display field service reports and Help in the Oracle Field Service/Laptop application.

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 *Oracle CRM Gateway for Mobile Devices Implementation Guide*.

4 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 ConsolidatorClien and Oracle 8i Lite
- 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
- 4.6Step 5: Configuration Procedure for Oracle Field Service/Laptop

4.1 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 downloads and runs olite setup.exe to install: - Consolidator - Oracle 8*i* Lite	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

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

Performed on the CRM Gateway for Mobile Devices.

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**.

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    > **Note:** Choose **Edit** when you have already loaded the Oracle Field Service/Laptop aplication onto the CRM Gateway for Mobile Devices before.

4. Click **OK**.

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

6. 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 (leave empty)
Default Page	index.html
Local Application Directory	<cd-drive>:\
Icon	N/A (leave empty)

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

    Choose the **setup.exe** file in the file panel after removing all the other files.

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

9. 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

10. Choose **Publish the current application**.

11. Click **OK**.

    The Publish the Application window appears.

12. 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

13. Select the **Public** checkbox.

14. Click **OK**.

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

    ▪

    > **Note:** When nothing happens, start the Oracle Web-to-go
    > service from Service on the Control Panel.

15. When the application is published succesfully click **OK**.

16. Click **Exit** to quit the program.

4.3 Step 2: Downloading and Installing ConsolidatorClien and Oracle 8*i* Lite

Performed on the laptop device.

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 Oracle 8*i* Lite database.

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

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

   The Oracle CRM Client setup screen is opened with a section to download the CRM Client setup program and updates when available.

2. Click on the link to download the CRM Client setup program.

   ■ If you are using Netscape, choose a location to save the setup program and click **Save**. In Windows Explorer, double-click setup.exe from the chosen location to run the setup program.

   ■ If you are using Internet Explorer, choose the option **Save this file to disk** and click **OK**. Choose a location to save the setup program and click **Save**. When downloading is completed click **Open Folder** and run the setup program.

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

3. Choose a directory, for example, C:\ora_HOME, and click **OK**. The setup program downloads all the required components.

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> **Note:** The Oracle CRM Client setup program may prompt you to select a palm user, ignore this and click **Cancel**. When downloading is completed a dialog box may appear stating the Palm Desktop environment can not be located. Ignore this message.

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

Performed on the laptop device.

This procedure describes how to use the ConsolidatorClient to deploy the installation program (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 **Save**, to save the values entered.

4. Click **Apply**.

5. Click **Sync**.

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

4.5 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.

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> **Note:** An ODBC Error message might be shown describing the failure of creating an ODBC connection for Oracle Lite. Click **OK**.
>
> The procedure to create this connection manually, is described from step 9 onwards.

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

- Backup (optional)
- Jobsheet
- Help
- Laptop
- System32

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

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

9. To manually create an ODBC connection, perform the following steps.

   a. Open ODBC Data Sources from the Windows Control Panel.

   b. Select the Systems DNS tab.

   c. Click **Add...**

   d. Select Oracle Lite 40 ODBS Driver.

   e. Click **Finish**. The Oracle Lite ODBC Setup dialog box is shown.

   f. Enter the following values into the fields:

Field	Value
Data Source Name	OMFS_DB

Field	Value
Data Description	(Leave empty)
Database Directory	C:\ora_HOME
Database	ServiceL
Default Isolation Level	Read Committed
Autocommit	on
Default Cursortype	Static

    g. Click **OK**. A new System Data Source Name (OMFS_DB) is created.

    h. Click **OK** to close the ODBC Data Source Administrator.

You are now ready with the Installation procedure for Oracle Field Service/Laptop.

4.6 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. Choose a Connection Type:

   ■ Check **Phone** for wired communication.

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> **Note:** All other options involve future enhancements.

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 the *Oracle Field Service/Laptop Implementation Guide*.