

Oracle[®] Field Service

Implementation Guide

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Oracle Field Service Implementation Guide, Release 11*i*.

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Preface

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

This Implementation Guide provides information and instructions to help you implement Oracle Field Service effectively.

This preface explains how the Implementation Guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility

Structure

This manual contains the following chapters:

“Implementing Field Service” provides overviews of the implementation and its components to perform essential business tasks, as well as the application’s relationships to other Oracle or third-party applications. It provides process-oriented, task-based procedures for setting up the application.

Related Documents

For more information, see the following manuals:

- *Installing Oracle Applications, Release 11i*

- *Implementing CRM Applications*
- *Oracle Field Service Concepts and Procedures*
- *Oracle CRM Foundation Concepts and Procedures*

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Implementing Field Service

This topic group provides general descriptions of the setup and configuration tasks required to implement the Field Service application successfully.

Topics covered are:

- [Implementation Overview](#)
 - [Implementing Checklist](#)
- [Implementing Steps](#)
- [Setting Up Field Service](#)
 - [Setting Up Resource Relations](#)
 - [Assigning Territories to Planner Groups](#)
 - [Resources Subinventories Assignment](#)
 - [Generating Shift Tasks](#)
 - [Define Material Justification Code](#)
 - [Define Expense Justification Code](#)
 - [Define Labor Justifications Code](#)
 - [Profile Options](#)

1.1 Implementation Overview

Before setting up Field Service, you must install and fully implement these Oracle applications or components:

- Oracle Human Resources
- Oracle Inventory
- Oracle Service Core
- Order Management
- Oracle Service
 - Charges
 - Installed Base
 - Counters
- Oracle Spares Management
- Oracle CRM Foundation
 - Assignment Manager
 - Resource Manager
 - Territory Manager
 - Tasks
 - Calendar

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

The implementation steps described here are tasks that are necessary to use the additional functionality included with Field Service.

1.1.1 Implementing Checklist

While you can implement Field Service in many different ways, the following checklist shows the recommended order. Complete the following implementation steps in sequential order.

Step	Required	Step Title
1.	Yes	Setup Sys Admin

2.	Yes	Define Key Flexfields
3.	Yes	Define Calendar, Currency & Set of Books
4.	Yes	Confirm Setup of Employees
5.	Yes	Confirm Setup of Resource Manager
6.	Yes	Confirm Setup of Inventory
7.	Yes	Confirm Setup of Spares Management
8.	Yes	Confirm Setup of Order Management
9.	Yes	Confirm Setup of Service Request
10.	Yes	Confirm Setup of Customer Model 11i (TCA)
11.	Yes	Confirm Setup of Territory Manager
12.	Yes	Confirm Setup of Task Manager
13.	Yes	Confirm Setup of Escalation Manager
14.	Yes	Confirm Setup of Charges
15.	Yes	Confirm Setup of Knowledge Base
16.	Yes	Confirm Setup of Counters
17.	Optional	Confirm Setup of Notes
18.	Optional	Confirm Setup of Interaction History
19.	Yes	Confirm Setup of Installed Base
20.	Optional	Confirm Setup of Contracts Core
21.	Optional	Confirm Setup of Service Core
22.	Yes	Confirm Setup of Assignment Manager
23.	Yes	Confirm Setup of Calendar
24.	Yes	Setup Field Service
25.	Yes	Setup Field Service Report
26.	Optional	Setup Scheduler
27.	Optional	Setup Time Distance Server
28.	Optional	Confirm Setup of Spatial Data
29.	Optional	Confirm Setup of Layer Style Guides
30.	Optional	Setup CRM Gateway for Mobile Devices

31.	Optional	Setup Field Service/Palm™ Devices
32.	Optional	Setup Field Service/Laptop
33.	Optional	Setup Field Service/Wireless

1.2 Implementing Steps

Perform the following implementation steps in sequential order:

1.2.1 Step 1: Set Up System Administrator

To fully implement Oracle Field Service, and set up the system across all applications (CRM and ERP), you need the *System Administrator* responsibility. Please see *Oracle Applications System Administrator's Guide* for more information.

The Oracle Field Service application comes with the following seeded responsibilities:

Responsibility	Description
Field Service Administrator	Allowed to perform all administrative tasks within CRM Service, such as Setup.
Field Service Manager	Access to all applications and windows within CRM Service. Limited setup possibilities, such as creating task types.
Field Service Dispatcher	Access to all applications within CRM Service.
Field Service Representative	Access to a limited set of windows from the applications within CRM Service.

- To define additional responsibilities, please see *Oracle Applications System Administrator's Guide*.
- Set up printers (optional). For more information, see: *Setting Up Your Printers, Oracle Applications System Administrator's Guide*.

1.2.2 Step 2: Define Key Flexfields

The setup of key flexfields is required.

Be sure to coordinate with other applications such as Oracle Human Resource Management or Oracle General Ledger, those products' flexfield setup before defining the key flexfields here, as it is not recommended to change flexfields frequently. For more information, see: *Oracle Applications Flexfields Guide*.

For each key flexfield, you perform the following tasks, some of which are optional for some flexfields:

- Define the flexfield structure.

- Define value sets.
- Define flexfield segments.
- Define flexfield segment values.
- Define security rules.
- Assign security rules.
- Define roll-up groups.
- Define cross-validation rules.

Steps

1. Switch to the System Administrator responsibility.
2. Navigate to **Application > Flexfield > Key**.
3. Set up the Accounting flexfield. You may not need to perform this step if you have already installed and set up Oracle General Ledger or performed a common-applications Setup. For more information, see *Oracle General Ledger User's Guide*.
4. Set up the following Human Resources key flexfields. You may not need to set up these key flexfields if you have already installed and set up Oracle Human Resource Management Systems or performed a common-applications Setup. For more information, see: *Oracle Human Resources User's Guide*.
 - Grade flexfield
 - Job flexfield
 - Position flexfield
 - People Group flexfield

1.2.3 Step 3: Define Calendars, Currencies, and Set of Books

The setup of Calendars, Currencies, and Set of Books is required.

If you have defined your calendars, currencies, and set of books while setting up a different Oracle Applications product, proceed with the next step. However, if you are performing a Multi-Org implementation, see the note below.

Note: If you are performing a Multi–Org implementation, you may optionally create more than one calendar, currency, or set of books. For more information, see: *Multiple Organizations in Oracle Applications*.

To setup Calendars, currencies, and a set of books perform the following steps:

- [Define a Calendar](#)
- [Define a Currency](#)
- [Define a Set of Books](#)
- [Open and Close Accounting Periods](#)

1.2.3.1 Define a Calendar

Carefully consider the type of Calendar that you need for your organization, it can be difficult to change your calendar (for example, from a fiscal year to a calendar year) after you have used it to enter accounting data.

Steps

1. Switch to the GL (General Ledger) Super User responsibility.
2. Navigate to **Setup > Financials > Calendars**.
3. Set up Calendars:
 - Define period types. For more information, see: *Defining Period Types, Oracle General Ledger User's Guide*.
 - Define accounting calendar. For more information, see: *Defining Calendars, Oracle General Ledger User's Guide*.
 - Define transaction calendar. For more information, see: *Defining Transaction Calendars, Oracle General Ledger User's Guide*. (Optional)
 - Define workday calendar. For more information, see: *Overview of Workday Calendar, Oracle Bills of Material User's Guide*. (Optional)
 - Define exception templates. For more information, see: *Creating a Workday Exception Template, Oracle Bills of Material User's Guide*. (Optional)

1.2.3.2 Define Currencies

Use the Currencies window to define non-ISO (International Standards Organization) currencies and to enable or disable currencies. Oracle Applications has predefined all currencies specified in ISO standard 4217. To use a currency other than U.S. dollars (USD), you must enable that currency. USD is the only currency that is enabled by default.

Steps

1. Switch to the GL (General Ledger) Super User responsibility.
2. Navigate to **Setup > Currencies**.
3. Set up currencies:
 - Define currencies. For more information, see: *Defining Currencies, Oracle General Ledger User's Guide*.
 - Define conversion rate types. For more information, see: *Defining Conversion Rate Types, Oracle General Ledger User's Guide*.

1.2.3.3 Define a Set of Books

A set of books determines the functional currency, account structure, and accounting calendar for each company or group of companies. If you need to report on your account balances in multiple currencies, you should set up one set of books for each reporting currency.

Your primary set of books should use your functional currency. Each reporting set of books should use one of your reporting currencies.

Steps

1. Switch to the GL (General Ledger) Super User responsibility.
2. Navigate to **Setup > Financials > Books**.
3. Setup Set of Books:
 - Assign your set of books to a responsibility. For more information, see: *Oracle General Ledger User's Guide*.
 - Set up accounting code combinations. For more information, see: *Oracle General Ledger User's Guide*.

1.2.3.4 Open and Close Accounting periods

It is necessary to open and close accounting periods. For more information, see: *Opening and Closing Accounting Periods, Oracle General Ledger User's Guide.*

1.2.4 Step 4: Confirm Setup of Employees

The setup of Employees is required. You setup Employees in Oracle Human Resources.

Steps

1. Switch to the HR (Human Resource) Super User responsibility.
2. Navigate to **People > Enter and Maintain.**
3. Setup employees.
 - Please refer to the appropriate section in *Oracle Human Resource Management Systems* to enter and maintain employees.

The Setup of Employees is also addressed in more detail in Setup Resource Relation as part of [Setting Up Field Service](#).

1.2.5 Step 5: Confirm Setup of Resources

Make sure you implement Resource Manager as described in Implementing Oracle Resource Manager in *Oracle CRM Foundation Implementation Guide.*

The Field Service specific setup of Resource Manager involves the following:

- Setup service representatives. In Resource Manager assign role 'Field Service Representative' to a resource to make it visible in the Control Tower.

A field service representative does not have to be defined as an employee and does not have to be an Oracle Applications User.
- Setup planners. A planner does not need a specific role assigned. You can assign the role 'Field Service Dispatcher' in Resource Management.

A planner needs to be defined as an employee and assigned an Oracle Applications User. Define the planner as an employee and import the employee into Resource Management to define it as a resource. It is then automatically assigned an Oracle Applications User.

- Create planner groups by creating resource groups with only planners assigned to it. The planner groups are used to assign groups of service representatives created in Territory Management to.

The Setup of Resources is also addressed in more detail in Setup Resource Relation as part of [Setting Up Field Service](#).

1.2.6 Step 6: Confirm Setup of Inventory

The implementation of Inventory is required for two purposes:

- To define the units of measurement (UOM) required by Field Service.
- To report on items used taken down on the Field Service Report.

Set up Inventory as described in Overview of Setting Up in *Oracle Inventory User's Guide*. Ensure that all the following required steps have been reviewed and completed as necessary:

- Create items.
- Make sure that on Master Item level the Serviceable Product flag is checked for the organization.
- Define Sub-inventories. A standard setup is required for each sub-inventory.

The following Field Service specific setup step is necessary.

- [Define Unit of Measurement](#)

1.2.6.1 Define Unit of Measurement

You need to define the UOM for Hour and Minute. Two profile options in Field Service make use of these UOM's. It is used to define a planned start and end time when creating a task.

Note: The Unit of Measure for Hours is pre-defined for use on the Field Service Report.

Steps

1. Switch to the Inventory Super User responsibility.
2. Navigate to **Setup > Units of Measure**.
3. Make sure the unit of measure for Hour and Minute is defined.

For setup details please refer to *Oracle Inventory User's Guide* for more information.

1.2.7 Step 7: Confirm Setup of Spares Management

The implementation of Spares Management is required for two purposes.

- To be able to locate spare parts (material) from the Field Service Control Tower.
- To maintain the level of material in the subinventories. This could be warehouses and service representatives vehicles.

Please refer to *Implementing Oracle Spares Management* for Spares Management setup.

No additional Field Service specific setup steps are necessary.

1.2.8 Step 8: Confirm Setup of Order Management

Implement Order Management as described in *Overview of Setting Up, Oracle Order Management User's Guide*.

Field Service requires specifically that you setup Price Lists and Units of Measure (UOM) in Order Management. Price Lists contain the list price for an item. Items could be material, but also labor and expenses like units of driving distance. Once material, expense and labor transactions for a task have been taken down on the Field Service Report, this information is updated to Charges. In Charges the list price for the item is received from Order Management and is used to generate an invoice for a customer.

After setup of Unit of Measurement for an item, it is displayed automatically in the Field Service Report when the item is selected.

Perform the following steps:

- [Setup Price Lists](#)
- [Setup Unit of Measurement \(UOM\)](#)

1.2.8.1 Setup of Price Lists

Perform the following steps to create price lists listing prices for items.

Steps

1. Switch to Order Management Super User responsibility.

2. Navigate to **Pricing > Price Lists > Price List Setup**.
3. At **Description** enter a description of the Price List.
4. At **Round To** enter the rounding factor to be applied in the Price list.
 - A positive number indicates the number of digits to the right of the decimal point.
 - A negative number indicates the number of digits to the left of the decimal point.

The default setting is -2.

5. At **Effective Dates** enter the start and end date for the Price List to be effective.
6. Enter the default **Payment Terms**, default **Freight Terms**, and **Freight Carriers**.
7. Click on the List Lines tab.
8. Select the item from the **Product Context** or **Product Attribute** column.
9. Choose the **UOM** for the item.
10. Select the **Application Method**:

- **Unit Price** or **Percent Price** for service items.
- For inventory items or item categories only Unit Price is used.

11. For service items enter a value at **Operand** and leave **Formula** open.
12. At **Start Date** and **End Date** enter the effective date for this item line.

The dates entered should be within the Effective Dates entered for the Price List.

13. At **Line Type** select **Price List Line** from the list of values.
14. At **Modifier Level** select **Line** from the list of values.
15. Enter a value at **Precedence**.

This is the product precedence. When the pricing engine is trying to locate a price, it uses Precedence to resolve conflicts when it selects more than one list line from a Price List.

16. Check **Primary UOM** if this is the primary pricing uom for this list line item on the price list.
17. **Save** the Price List.
18. Click on **Pricing Attributes** to define pricing attributes.

19. Enter a pricing context in the Product Context column and an attribute in the Product Attribute column.
20. At **Operator** select = or **BETWEEN**.
21. At **Value**:
 - When Operator is BETWEEN, enter **To**.
 - Otherwise enter **From**.
22. **Save Pricing Attributes**.

1.2.8.2 Setup Unit of Measure

Field Service requires a unit of measure(UOM) for measuring the item, for example, Each or Dozen. The UOM is displayed on the Field Service Report in accordance with the item that is selected.

1. Switch to Order Management Super User responsibility.
2. Navigate to **Setup > Unit of Measure > Setup**.
3. Click **Help** for details.

1.2.9 Step 9: Confirm Setup of Service Request

On the service request form all information for a field service visit is captured. Tasks are assigned to this service request and these tasks are assigned to field service representatives.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Service Requests**.
3. Make sure you setup the following:
 - Service Request Statuses
 - Request Severities
 - Request Types
 - Service Request Urgencies
 - Problem Codes
 - Resolution Codes

- Message Action Requests

For setup details please refer to the *Oracle Support Implementation Guide*. Also make sure the profile options for Service Request are set.

No additional Field Service specific setup steps are necessary.

1.2.10 Step 10: Confirm Setup of Customer Model 11i (TCA)

Customer Model 11i is an architecture designed to support complex trading communities. The goal of the Customer Model is to provide the foundation for Oracle ERP, CRM, and E-Business applications. It strives to model all relationships within a given trading community. For example the trading community of an appliance manufacturer might include suppliers, distributors, resellers, retailers, and service providers.

To maintain consistency across all applications Field Service shares the new customer master information with other modules. Customers can be defined in Order Management, Oracle Receivables, and Customer Support.

Multiple addresses can be defined for one or more businesses, for example Ship-To address, Bill-To address, and installation address. To be able to assign tasks to field service representatives, the Installed-At address needs to be defined.

Steps

1. Switch to the Customer Support or Order Management responsibility.
2. Navigate:
 - in Customer Support to **Customer Management > Contact Center**.
 - in **Order Management to Customers > Standard**.
3. In both application make sure the Installed At address is defined.

For setup details please refer to *Oracle Customer Care Concepts and Procedures* or *Oracle Order Management User's Guide*.

1.2.11 Step 11: Confirm Setup of Territory Manager

In Field Service territories are used for two purposes:

- You create territories for scheduling purposes based on qualifiers. These territories are used by the Assignment Manager and Oracle Scheduler (when installed) to assign a task to a service representative.

- You create territories with resources (field service representatives) assigned to them. You will use these territories to assign them to one or more planner groups (created in Resource Manager). Once they are assigned to the planner groups this is the default group of field service representatives that is shown to a planner in the Field Service Control Tower.

Set up Territory Manager as described in *Implementing Territory Management* as part of the *Oracle CRM Foundation Implementation Guide*. Create Territories as described in *Oracle CRM Foundation Concepts and Procedures*

The creation of territories is also addressed in more detail in Setup Resource Relation as part of [Setting Up Field Service](#).

1.2.12 Step 12: Confirm Setup of Tasks

The setup of Tasks is required to be able to perform a field service visite. You create tasks for service requests that have been logged. In the Field Service Control Tower you schedule tasks.

Make sure you implement Task Manager as described in *Implementing Task Manager* as part of the *Oracle CRM Foundation Implementation Guide*.

Perform the following Field Service specific setup steps:

- [Setup Task Status](#)
- [Setup Task Type](#)
- [Setup Task Priority](#)
- [Setup Task Manager Profile Options](#)

1.2.12.1 Setup Task Status

Setup task statuses to define the task flow. Field Service comes with a pre-defined task status flow.

Steps

1. Switch to Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Task Manager > Setup > Task Status**.
3. At **Status** enter the name of the Task Status you want to define.
4. At **Description** enter a brief description of the Task Status you are defining.
5. At **From** and **To** enter the date for the Task Status to be effective.

6. Check the task status flags you want to assign to the Task Status.

Note: Make sure to check the Schedulable flag in order to be able to schedule a task in Oracle Field Service.

7. Optionally, define the transition values to determine user privileges for each status type by clicking **Define Transition**.
8. **Save** the Task Status.

1.2.12.2 Setup Task Type

Set up task types to make a task qualify as a field service task so it can be scheduled.

Steps

1. Switch to Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Task Manager > Setup > Task Type**.
3. At **Type** enter the name of the Status Type you want to define.
4. At **Rule** select **Dispatch** from the list of values.

Note: For a task to qualify as a field service specific task the Rule has to be set to Dispatch.

5. At **From** and **To** enter the date for the Task Type to be effective.
6. Select an **UOM** (Unit of Measurement) to go with the Task Type.
7. Check the task type flags you want to assign to the Task Type.
8. **Save** the Task Type.

1.2.12.3 Setting Up Task Priority

Set up task priorities.

Steps

1. Switch to Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Task Manager > Setup > Task Priority**.
3. At **Priority** enter the name of the Status Priority you want to define.

4. At **Importance** enter a numerical value between 1 and 4.
5. At **Description** enter a brief description of the Task Priority you are defining.
6. At **From** and **To** enter the date for the Task Priority to be effective.
7. **Save** the Task Priority.

1.2.12.4 Setting Up Task Manager Profile Options

The profile options need to be set before creating a task. It is not possible to save a task when the profile options aren't set.

Steps

1. Switch to Field Service Administrator responsibility.
2. Navigate to **Other > Profiles**.
3. Open the Find Personal Profile Values window.
4. At **Profile Name** enter **Task Manager%**.
5. Click **Find**.
6. Enter User values for the following profile options:
 - Task Manager: Default Priority
 - Task Manager: Default Task Status
 - Task Manager: Default Task Type
 - Task Manager: Default task owner
 - Task Manager: Delete Any Task Privilege
 - Task Manager: Owner type for task
 - Task Manager: View All Tasks

Please refer to the *Oracle CRM Foundation Implementation Guide* for more information on the profile options.

1.2.13 Step 13: Confirm Setup of Escalations Manager

An escalation management system allows an organization to identify, track, monitor, and manage situations that require increased awareness and swift action.

Escalation Management features include:

- Escalation situation tracking information
- Service Request, Task, and Defect linking capability
- Ownership assignment based on escalation territory
- Resolution plan definition with associated tasks and notes
- Automatic notification of escalation progress to identified contacts
- De-escalation and closure

Please refer to the appropriate section from *Oracle CRM Foundation Implementation Guide* for Escalations Manager setup.

No additional Field Service specific setup steps are necessary.

1.2.14 Step 14: Confirm Setup of Charges

Oracle Field Service requires the setup of Charges to be able to create Orders and RMA's for an Installed Base product. Charges also consolidates the service billing information to generate the final invoice to the customer through Order Management. This information is taken down on the Field Service Report.

Please refer to the appropriate section from *Implementing Oracle Service* for Charges setup. Make sure the following has been set up:

- Set Up Order Type
- Set Up Line Type
- Define Currency
- Define Currency Type
- Define Currency Conversion Type
- Define Coverage Template
- Define Contracts
- Profile Options for Order Capture and Order Management

Complete the following Field Service specific setup steps:

- [Setting up Transaction Billing Types](#)
- [Setting up Business Processes](#)

1.2.14.1 Setting up Transaction Billing Types

Setup for transaction billing types is required in Field Service to update the Installed Base and Charges. It is used to determine:

- How Service and Order Management transactions affect the Installed Base.
- What kinds of charges transactions taken down on the Field Service Report can be created.

The Transactions Billing Type window is used to define transaction types and associate billing types (labor, material, and expenses) to them.

The Field Service application comes with the following predefined transaction billing types. They are seeded values provided out of the box, and they cannot be deleted.

- Autocreate System
- Expense Transaction
- Labor Transaction
- Material Transaction
- New
- Product Upgrade
- Replacement
- Revision Update

To define additional transaction billing types:

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Installed Base > Transaction Billing Types**.
3. Define a Transaction Type and whether or not it affects the Installed Base. When it does, you also need to define the status for the installed and/or new customer product.

The Installed Return Required flag is checked when the transaction is a replacement or an advance replacement; in other words, asking for the installed product to be returned. The New Return Required is required only in the case of replacements or advance replacements. After the original product from the customer is fixed, the new product must be returned.

If the No Charge Flag field is set to Y, the charge amount will be 0 and no charges will be passed to Order Management. Field Service doesn't require the Depot Oty Update Flag.

4. For each Transaction Type you associate a Billing Type.
Only those transaction types that have a billing type defined will appear in the list of values on the Field Service Report.
5. Save your work.

1.2.14.2 Setting up Business Processes

Business Process Setup is required in order to select the transaction types in Field Service Report and to get the order type information for creating orders or returns against debrief lines.

Business Process groups the transaction types to restrict the transaction type availability. For example, Oracle has provided an out-of-box Field Service business group that enables the relevant transaction types. You can update this group because it is not a seeded value.

Steps

1. Switch to Field Service Administrator responsibility.
2. Navigate to **Setup > Installed Base > Business Processes**.
3. Enabling the Service Request flag enables the user to pick this business process when charges are invoked from Service Request.
4. Enabling the Depot Repair flag enables the user to pick this business process when charges are invoked from Depot Repair.
5. Enabling the Field Services flag shows transaction types for all business processes that have this flag enabled in Field Service Report.

Please refer to the appropriate section from *Oracle Service Implementation Guide* for detailed Charges setup.

6. Save your work.

1.2.15 Step 15: Confirm Setup of Knowledge Management

Setup Knowledge Management.

Please refer to the appropriate section from *Oracle Service Implementation Guide* for Knowledge Management setup.

No additional Field Service specific setup steps are necessary.

1.2.16 Step 16: Confirm Setup of Counters

The setup of Counters is required to be able to report counter readings when performing a field service visit.

Please refer to the appropriate section from *Oracle Service Implementation Guide* for Counters setup.

No additional Field Service specific setup steps are necessary.

1.2.17 Step 17: Confirm Setup of 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 Field Service Report.

Please refer to the appropriate section from *Oracle CRM Foundation Implementation Guide* for Notes setup and to define source types.

No additional Field Service specific setup steps are necessary.

1.2.18 Step 18: Confirm Setup of Interaction History

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. You can access Interactions from Field Service Report.

Please refer to the appropriate section from *Oracle CRM Foundation Implementation Guide* for Interaction History setup.

No additional Field Service specific setup steps are necessary.

1.2.19 Step 19: Confirm Setup of Installed Base

The Installed Base is a repository that contains vital information and details of a service provider's customers, products, and services. The service provider updates all data contained in the Installed Base.

Installed Base is a component of Oracle Service, it consolidates information for customer products in the Installed Base. Each customer product includes the following:

- Customer name and number
- Bill-to location code, address, and contact
- Ship-to location code, address, and contact
- Installation location, address, and technical and administrative contact
- Service Provider
- Any other user-defined contacts

Use the Installed Base to track your serviceable and customer products.

Make sure you set up Installed Base as described in *Oracle Service Implementation Guide*:

- Confirm the ERP setup.
- Confirm status of customer products setup.
- Confirm customer product types (optional).
- Confirm system types setup.
- Confirm transaction billing types setup.
- Confirm split process reasons setup.
- Confirm business processes setup.
- Confirm customer product configuration types setup.
- Confirm profile options setup:
 - Many service options
 - Options to access HTML windows
 - Options for the Installed Base Interface concurrent program
- Confirm System Administration menu setup.
- Confirm inventory item setup.
- Test the Installed Base Interface concurrent program.

Once the Installed base has been set up you maintain it using the Field Service Report to report on installed base transactions and update Installed Base from it.

1.2.20 Step 20: Confirm Setup of Contracts Core

The set up of Contracts Core is optional, but when you have installed it, please refer to *Implementing Oracle Contracts Core* for Contracts setup.

No additional Field Service specific setup steps are necessary.

1.2.21 Step 21: Confirm Setup of Service Contracts

Service Contracts is not required. You can create a service request without any service coverage.

When you are using Service Contracts a service contract is associated with a service request. The service contract is associated with the:

- Party
- Account
- System
- Customer Product
- Inventory Item

Select Service Contracts from the Product Coverage tabbed page on the service request form. You can drill down to contract details on the Product Coverage tabbed page.

Please refer to *Implementing Oracle Contracts for Service* for Service Contracts setup.

No additional Field Service specific setup steps are necessary.

1.2.22 Step 22: Confirm Setup of Assignment Manager

The setup of Assignment Manager is required because it is used to assign a service representative to a task. It can be used from the service request form and the Field Service Control Tower.

Please refer to the appropriate section from *Oracle CRM Foundation Implementation Guide* for Assignment Manager setup.

Please ensure the following profile options are set before using Field Service. The profile options are set at the application level and are unique to Assignment Manager.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Other > Profiles**.
3. Open the Find Personal Profile Values window.
4. At **Profile Name** enter **AC%**.
5. Click **Find**.

You can set these options in any sequence.

Step	Profile Option	Description
1	Activate Auto Selection of Resources	To activate auto selection of resources. Default set to: Y (yes).
2	Activate Workflow Name	To activate the workflow plug-in. Default set to: None .
3	Activate Installed Base Preferred Resource	To retrieve preferred resource information from the installed base application. Default set to: Y (yes).
4	Activate Contracts Preferred Resources	To retrieve preferred resource information from the contracts application. Default set to: Y (yes).

1.2.23 Step 23: Confirm Setup of Calendar (CRM Foundation)

The setup of Calendar is required to define the availability and non-availability of resources (field service representatives). This information is used when scheduling a task for a resource. Especially the setup of shifts is very important because it is used to generate departure and arrival tasks for each service representative. These departure and arrival tasks show up in the Field Service Control Tower and are used for scheduling purposes. This is discussed in more detail in [Setting Up Field Service](#).

Make sure to perform the following setup steps:

- [Defining a Calendar](#)
- [Defining Calendar Exceptions](#)
- [Defining Shifts](#)
- [Assigning Shifts/Exceptions to a Calendar](#)

- [Assigning Resources to a Calendar](#)

1.2.23.1 Defining a Calendar

Create a high level definition for a calendar for a particular group of resources.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Calendar > Calendar Setup > Define Calendar**.
3. For details see, *Oracle CRM Foundation Implementation Guide*.

1.2.23.2 Defining Calendar Exceptions

Define the exceptions that could occur for a calendar, such as Christmas holidays.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Calendar > Calendar Setup > Define Exceptions**.
3. For details see, *Oracle CRM Foundation Implementation Guide*.

1.2.23.3 Defining Shifts

Define the working hours for your resources.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Calendar > Calendar Setup > Define Shifts**.
3. For details see, *Oracle CRM Foundation Implementation Guide*.

1.2.23.4 Assigning Shifts/Exceptions to Calendar

Define what shifts and exceptions you want to associate with a calendar.

Steps

1. Switch to the Field Service Administrator responsibility.

2. Navigate to **CRM Foundation > Calendar > Calendar Setup > Assign Shifts/Exceptions**.
3. For details see, *Oracle CRM Foundation Implementation Guide*.

1.2.23.5 Assigning Resources to Calendar

Define for each calendar for which resources it applies.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Calendar > Calendar Setup > Assign Resources**.
3. For details see, *Oracle CRM Foundation Implementation Guide*, or click here when you are using iHelp.

1.2.24 Step 24: Setup Field Service

Make sure you setup Field Service as described in [Setting Up Field Service](#). This step involves the following tasks:

- [Setup Resource Relation](#)
- [Assign Territories to Planner Groups](#)
- [Resources Subinventories Assignment](#)
- [Generating Shift Tasks](#)
- [Define Material Justification Code](#)
- [Define Expense Justification Code](#)
- [Define Labor Justifications Code](#)
- [Profile Options](#)

1.2.25 Step 25: Setup Field Service Report

Field Service Report is part of the Field Service application and is used to report all material, expense, and labor transactions. From the Field Service Report screen you update Inventory, Installed Base, and Charges. When material, expense, and labor transactions are recorded on one of the Field Service/Mobile applications all transactions are shown and updated to Inventory, Installed Base, and Charges from the Field Service Report.

Make sure you implement Field Service as described in the implementation steps before. Especially the following implementation steps affect Field Service Report. Refer to each implementation step for detailed information.

- [Step 6: Confirm Setup of Inventory](#)
- [Step 7: Confirm Setup of Spares Management](#)
- [Step 8: Confirm Setup of Order Management](#)
- [Step 13: Confirm Setup of Charges](#)
- [Step 18: Confirm Setup of Installed Base](#)

Additionally perform the following Field Service Report specific setup steps:

- [Define Material, Expense, and Labor Justification Code](#)
- [Set Profile Option](#)

1.2.25.1 Confirm Setup of Inventory

In order to report on material used, Oracle Inventory needs to be fully implemented. You update Inventory from the Field Service Report.

1.2.25.2 Confirm Setup of Spares Management

In Spares Management you maintain the whereabouts of all material on a detailed level. When Spares Management is setup correctly you use it in Field Service Report to define from which subinventory materials were used or in which subinventory they are stored. You update Spares Management from the Field Service Report through Inventory.

1.2.25.3 Confirm Setup of Order Management

Field Service Report requires specifically that you setup Price Lists and Units of Measure (UOM) in Order Management. Price Lists contain the list price for an item. Items could be material, but also labor and expenses like units of driving distance. Once material, expense and labor transactions for a task have been taken down on the Field Service Report, this information is updated to Charges.

1.2.25.4 Confirm Setup of Charges

All material, expense, and labor transactions need to be verified against any contract coverage and/or charged to the customer. You update Charges from the Field Service Report.

Make sure the following is setup in Charges correctly:

- **Confirm Setup of Business Process**

Field Service Report displays the transaction types for only those business processes that have the Field Service flag turned on. Oracle provides the following business processes out-of-the-box. (These are not seeded values and therefore the customer can update them.)

- Field Service
- Depot Repair

- **Confirm Setup of Transaction Billing Types**

As mentioned above, transaction billing types with all business processes with the Field Service flag turned on are displayed in the list of values for transaction types on the Field Service Report form. This means you can have the same transaction types repeated in the list of values because they can belong to multiple business processes.

- **Confirm Setup of Billing Types**

The Item field in the Field Service Report for each tab displays the following items:

Material tabbed page: All items that are defined in the Services tabbed page of the Item Master that have the Serviceable Product flag enabled and have the billing type set to Material are displayed in the list of values for items in the Material tabbed page.

Labor tabbed page: All items that are defined in the Service tabbed page of the Item Master that have the Serviceable Product flag enabled and have the billing type set to Labor are displayed in the list of values for items in the Labor tabbed page.

Expenses tabbed page: All items that are defined in the Service tabbed page of the Item Master that have the Serviceable Product flag enabled and have the billing type set to Expense are displayed in the list of values for items in the Expenses tabbed page.

1.2.25.5 Confirm Setup of Installed Base.

Material transactions for Installed Base products are taken down on the Field Service Report. You update Installed Base from the Field Service Report.

1.2.25.6 Define Material, Expense, and Labor Justification Code

Please address the following setup screens which are specific to Field Service Report:

- [Define Material Justification Code](#)
- [Define Expense Justification Code](#)
- [Define Labor Justifications Code](#)

Please go to the Field Service Set up section for details.

1.2.25.7 Set Profile Option

Make sure the following profile option is set:

Steps

1. Switch to the System Administrator responsibility.
2. Navigate to **Profile > System**. The Find System Profile screen is opened.
3. Check Site.
4. At Profile enter CSF%.
5. Click **Find**.

Profile Option	Description
CSF: Return Reason	Used to default a Return Reason on the Field Service Report window for a material line created. Select which one should be defaulted from the list of values. It's a mandatory field for Order Management. Especially use this profile option when working with one of the mobile applications.

1.2.26 Step 26: Setup Scheduler

Oracle Scheduler is used to optimize scheduling capabilities. It is bought separately.

When Oracle Scheduler is installed make sure you set up Scheduler as described in *Implementing Oracle Scheduler*. The setup is also described in the following steps.

1.2.27 Step 27: Setup Time Distance Server

When you installed Oracle Scheduler you need to set up the Time Distance Server. The time distance server is used to calculate travel time and distance in between two tasks. This is done based on spatial data bought separately.

The setup for Time Distance Server is done by setting the Field Service specific profile options.

Steps

1. Switch to the System Administrator responsibility.
2. Navigate to **Profile > System**. The Find System Profile screen is opened.
3. At Profile enter **CSF%**.
4. Click **Find**.

You can set the profile options in the following table in any sequence.

Step	Option	Description
1	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.
2	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.
3	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 . Note: This profile option needs to be set only when using Oracle Scheduler
4	CSF: Time distance server calculation factor	If the factor is set the Time Distance Server calculates travel distance and duration faster but less accurate. Note: This profile option needs to be set only when using Oracle Scheduler

1.2.28 Step 28: Confirm Setup of Spatial Data

Spatial data is bought separately. Spatial data is used for Map Display (Control Tower), Route Calculation and Location finding (Oracle Scheduler), it provides the Time Distance Server with route information and the location finder with address information. Map Display is directly available to the user as part of the control tower functionality. The TimeDistance Server uses spatial data to calculate travel time and distances for Field Service and Scheduler. The same applies to the location finder for address information.

After installing spatial data, check whether the data is csf_loaded into the system correctly. Perform the following checks:

- Check if the Spatial Data Option is Installed
- Check whether the Data Tables are Empty or not
- Check if the Normal and Spatial Indexes are Created

1.2.28.1 Check if the Spatial Data Option is Installed

Even though it's impossible to load spatial data when the spatial data cartridge is not installed, a DBA task is to check whether it is installed. The MDSYS user schema must be there.

1.2.28.2 Check whether the Data Tables are Empty or Not

The following data tables contain the necessary spatial data. For each country, the number of rows in each table might differ.

Check as a user with DBA access that none of the following data tables are empty:

Note: Please note that the installation script delivered with the data should provide for this. The above is only required when a confirmation test is needed.

CSF.CSF_LF_BLOCKS

CSF.CSF_LF_NAMES

CSF.CSF_LF_PLACES

CSF.CSF_LF_PLACE_NAMES

CSF.CSF_LF_PLACE_POSTCS

CSF.CSF_LF_POIS
CSF.CSF_LF_POI_NAMES
CSF.CSF_LF_POSTCODES
CSF.CSF_LF_ROADSEGMENTS
CSF.CSF_LF_ROADSEGM_NAMES
CSF.CSF_LF_ROADSEGM_PLACES
CSF.CSF_LF_ROADSEGM_POSTS
CSF.CSF_MD_ADM_BOUNDS
CSF.CSF_MD_HYDROS
CSF.CSF_MD_INST_STYLE_SHTS
CSF.CSF_MD_LAND_USES
CSF.CSF_MD_LYR_METADATA
CSF.CSF_MD_LYR_STYLE_SHTS
CSF.CSF_MD_NAMES
CSF.CSF_MD_POIS
CSF.CSF_MD_POI_NM_ASGNS
CSF.CSF_MD_RAIL_SEGS
CSF.CSF_MD_RDSEG_NM_ASGNS
CSF.CSF_MD_RD_SEGS
CSF.CSF_MD_THEME_METADATA
CSF.CSF_SDM_CTRY_PROFILES
CSF.CSF_TDS_CONDITIONS
CSF.CSF_TDS_COND_SEGS
CSF.CSF_TDS_INTERVALS
CSF.CSF_TDS_NODES
CSF.CSF_TDS_RDBLCK_INTVLS
CSF.CSF_TDS_RDBLCK_SGMNTS
CSF.CSF_TDS_ROADBLOCKS

CSF.CSF_TDS_SEGMENTS
CSF.CSF_TDS_SEGM_NODES
CSF.CSF_TDS_TILES
CSF.CSF_TDS_BINARY_MAPS
CSF.CSF_TDS_BINARY_TILES
CSF.CSF_TDS_BINARY_MAPS_COPY

1.2.28.3 Check if the Normal and Spatial Indexes are Created

After loading the spatial data, indexes have to be created to achieve optimal performance. These indexes should exist and have status VALID. If these don't exist or are invalid, the performance will be less. A particular statement to see the list of indexes:

```
select object_name, object_type from all_objects  
where object_name like 'CSF%'  
and OBJECT_TYPE = 'INDEX';
```

The list indexes are:

CSF.CSF_MD_RDSEGS_N1
CSF.CSF_MD_RDSEG_NM_ASGNS_N1
CSF.CSF_MD_RDSEG_NM_ASGNS_N2
CSF.CSF_MD_NAMES_N1
CSF.CSF_MD_ADM_BNDS_N1
CSF.CSF_MD_RD_SEGS_N1
CSF.CSF_MD_HYDROS_N1
CSF.CSF_MD_RLSEGS_N1
CSF.CSF_MD_LND_USE_N1
CSF.CSF_MD_POIS_N1
CSF.CSF_LF_BLOCKS_N1
CSF.CSF_LF_BLOCKS_N2
CSF.CSF_LF_NAMES_N1

CSF.CSF_LF_NAMES_N2
CSF.CSF_LF_PLACES_U1
CSF.CSF_LF_PLACES_N2
CSF.CSF_LF_PLNMS_U1
CSF.CSF_LF_PLPCS_N1
CSF.CSF_LF_PLPCS_N2
CSF.CSF_LF_POIPL_N1
CSF.CSF_LF_POIS_N1
CSF.CSF_LF_PNAMES_N1
CSF.CSF_LF_PNAMES_N2
CSF.CSF_LF_POSTCODES_N1
CSF.CSF_LF_POSTCODES_N2
CSF.CSF_LF_RDSEGS_N1
CSF.CSF_LF_RDSEGNMS_N1
CSF.CSF_LF_RDSEGNMS_N2
CSF.CSF_LF_RDSEGPL_N1
CSF.CSF_LF_RDSEGPL_N2
CSF.CSF_LF_RDSEGMPC_N1
CSF.CSF_LF_RDSEGMPC_N2
CSF.CSF_TDS_BINARY_TILES_N1
CSF.CSF_TDS_BINARY_TILES_N2
CSF.CSF_TDS_BINARY_TILES_N3
CSF.CSF_TDS_TILES_N1
CSF.CSF_TDS_TILES_N2
CSF.CSF_TDS_TILES_N3
CSF.CSF_TDS_TILES_N4
CSF.CSF_TDS_SEGMENTS_N1
CSF.CSF_TDS_SEGMENTS_N2

CSF.CSF_TDS_SEGMENTS_N3
CSF.CSF_TDS_SEGMENTS_N4
CSF.CSF_TDS_SEGM_NODES_N1
CSF.CSF_TDS_SEGM_NODES_N2
CSF.CSF_TDS_SEGM_NODES_N3
CSF.CSF_TDS_SEGM_NODES_N4
CSF.CSF_TDS_SEGM_NODES_N5
CSF.CSF_TDS_NODES_N1
CSF.CSF_TDS_NODES_N2
CSF.CSF_TDS_NODES_N3
CSF.CSF_TDS_NODES_N4
CSF.CSF_TDS_NODES_N5
CSF.CSF_TDS_NODES_N6
CSF.CSF_TDS_CONDITIONS_N1
CSF.CSF_TDS_CONDITIONS_N2
CSF.CSF_TDS_COND_SEGS_N1
CSF.CSF_TDS_COND_SEGS_N2
CSF.CSF_TDS_COND_SEGS_N3
CSF.CSF_TDS_ROADBLOCKS_N1
CSF.CSF_TDS_ROADBLOCKS_N2
CSF.CSF_TDS_RDBLCK_INTVLS_N1
CSF.CSF_TDS_RDBLCK_INTVLS_N2
CSF.CSF_TDS_RDBLCK_SGMNTS_N1
CSF.CSF_TDS_RDBLCK_SGMNTS_N2
CSF.CSF_TDS_RDBLCK_SGMNTS_N3
CSF.CSF_TDS_INTERVALS_N1
CSF.CSF_TDS_INTERVALS_N2

1.2.29 Step 29: Confirm Setup of Style Sheet

After installing spatial data, check whether the data is csf_loaded into the system correctly. Perform the following additional checks:

- Check whether the Layer Style Sheets Tables are not Empty
- Check Map Display

1.2.29.1 Check Whether the Layer Style Sheets Tables are not Empty

The following tables contain the layer sheets information:

CSF.CSF_MD_INST_STYLE_SHTS

CSF.CSF_MD_LYR_METADATA

CSF.CSF_MD_LYR_STYLE_SHTS

Layer style sheets define the “display” of the spatial data. These are all predefined and optimized for the data set used but it is possible to modify the style sheets. It is recommended to involve a consultant with experience in Geographic Information to define alternative settings in the layer style sheets.

By default in the style sheets it is defined per spatial object type (i.e., motor way, waterway, residential area, etc.) how and under what conditions it is displayed. For example when looking at an entire country there is no reason to display “local roads” as this kind of detail shows up as a colored blob on the screen. Also every object is given its own color. The color to display a road is different depending on the part of the world one is in, the style sheet also describes this information.

Knowledge required to modify the layer style sheets besides Oracle database is:

- Spatial cartridge and some geographic experience

1.2.29.2 Check Map Display

After the preceding checks, perform a quick check to see if the data is really there.

1. Navigate to the Control Tower in the Field Service application.
2. Select the Map.
3. Enter the user-id/password of the geographical database at the left of the **Init** button.
4. Click **Init**. The Map displays. Should it not be visible select zoom out.

When the map doesn't display at all, the data isn't there.

1.2.30 Step 30: Setup CRM Gateway for Mobile Devices

When you are going to use one of the following applications you need to setup the CRM Gateway for Mobile Devices:

- Oracle Field Service/Laptop
- Oracle Field Service/Palm™ 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.

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

1.2.31 Step 31: Setup Field Service/Palm™ Devices

Make sure you set up Oracle Field Service/Palm™ Devices as described in *Oracle Field Service/Palm™ Devices* and *Oracle Field Service/Palm™ Devices Installation Guide*. This includes the following setup screens on the CRM Enterprise database:

- Resources Subinventories Assignment
- Configuration Parameters

1.2.32 Step 32: Setup Field Service/Laptop

Make sure you set up Field Service/Laptop as described in *Oracle Field Service/Laptop Implementation Guide* and *Oracle Field Service/Laptop Installation Guide*. This includes the following setup screens on the CRM Enterprise database:

- Resources Subinventories Assignment
- Agenda Layout
- Configuration Parameters
- Field Service Report Type
- Field Service Report Manager
- User Defined Queries

The following tasks need to be performed on the laptop device:

- Enabling Communication on the Laptop Device

1.2.33 Step 33: Setup Field Service/Wireless

Make sure you set up Field Service/Wireless as described in *Oracle Field Service/Wireless Implementation Guide*.

This involves the following steps:

- Setting up the User with Wireless Responsibility
- Setting up the Profile Options for the Wireless User
- Setting the Profile Options for the Task Summary Display Screen Date Format
- Setting up the System for Route Directions
- Setting up the E-mail Server

1.3 Setting Up Field Service

Setting up the Field Service application includes the following setup steps, perform the steps, listed in the following table, in sequential order:

Step	Description
1. Setting Up Resource Relations	In order to launch the Field Service Control Tower you need to setup resources: field service dispatchers and field service representatives.
2. Assigning Territories to Planner Groups	Use this Field Service setup screen to relate territories of service representatives to field service dispatcher groups. Once setup this is the default group of service representatives shown to the field service dispatcher in the Field Service Control Tower.
3. Resources Subinventories Assignment	Use this setup screen in Field Service > Spares Management to relate sub inventories to service representatives.
4. Generating Shift Tasks	Use this Field Service concurrent program to create departure and arrival tasks for field service representatives based on their shifts. These tasks are used for scheduling.
5. Define Material Justification Code	Define justification lookup codes when reporting on material for the Field Service Report.
6. Define Expense Justification Code	Define justification lookup codes when reporting on expense for the Field Service Report.
7. Define Labor Justifications Code	Define justification lookup codes when reporting on labor for the Field Service Report.
8. Profile Options	Set all the field service specific profile options. Additionally set the following profile options: <ul style="list-style-type: none"> ■ TCF: HOST ■ TCF: PORT

1.3.1 Setting up Resource Relations

In order to launch the Field Service Control Tower as a dispatcher with the right field service representatives (resources) assigned, and to be able to assign tasks to these service representatives, you need to do the following:

- [Create Application Users with the Field Service Dispatcher Role](#)
- [Create Employees \(field service dispatchers, optionally field service representatives\)](#)
- [Assign the Field Service Representative Role to Employees](#)
- [Create Resources with the Field Service Representative Role](#)
- [Assign a Human Resource to an Applications user \(field service dispatcher\)](#)
- [Assign an Applications User to a Resource \(field service dispatcher\)](#)
- [Create Dispatcher Groups](#)
- [Create Territories \(of field service representatives\)](#)
- [Create Territories \(of qualifiers\)](#)
- [Generate Territory Packages](#)
- [Assign Territories \(of field service representatives\) to a Dispatcher Group](#)

1.3.1.1 Create Application Users with the Field Service Dispatcher Role

In order for a field service dispatcher to access the Field Service Control Tower create it in Applications with the following values:

Steps

1. Switch to the System Administrator responsibility.
2. Navigate to Security > User > Define.
3. Enter the Applications User Name and Password.
4. Make sure that on the responsibilities tab **Field Service Dispatcher** is selected from the list of values at Responsibility.
5. For more information on setup please refer to *Oracle Applications System Administrator's Guide*.

1.3.1.2 Create Employees

You need to define your field service dispatchers as employees (human resources). It is optional to define service representatives as employees. However you must define service representatives as resources in order to assign tasks to them but they do not necessarily have to be employees. This described in Create Resources with the Field Service Representative Role. There are two options for creating employees.

- From Human Resources
- From Resource Manager

When Human Resources is installed you cannot create employees from the Resource Manager. However you will be able to maintain your employees from Resource Manager once they have been created in Human Resources.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Resource Manager > Maintain Employee > Employee**. When Human Resource is installed, this will fail.
3. Switch to the HR Super User responsibility.
4. Navigate to **People > Enter and Maintain**.
5. For both applications you need to at least supply the following information:
 - Last Name: Last name of resource
 - Gender: Select from list of values
 - Type: select employee form list of values
 - Social Security: Social security number
 - Employee number
 - Birth Date

For set up details please refer to *Oracle CRM Foundation Implementation Guide* or *Oracle Human Resource Management Systems* to enter and maintain employees.

6. To synchronize modifications made to the employee data in Human Resources, you need to run a concurrent program: Synchronize Employees. The changes made in either Human Resources or Resource Manager are synchronized when they originate from the Human Resources application.

1.3.1.3 Assign the Field Service Representative Role to Employees

When you have defined your field service representatives as employees, they need to be assigned the field service representative role to show up in the Field Service Control Tower. Use the following procedure to assign the field service representative role.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Resource Manager > Maintain Resources > Import Resources**.
3. At Resource Category select **Employee**.
4. Enter search criteria in the Resource Category region.
5. Click **Search**. The results are shown in the Search Results region.
6. Check the resource and click **Create**. The Default Values window is opened.
7. At Role select **Field Service Representative** from the list of values.
8. Click **OK**.
9. Click **Save Resource**. A transaction number is displayed upon saving.

For additional set up details please refer to *Oracle CRM Foundation Implementation Guide*.

1.3.1.4 Create Resources with the Field Service Representative Role

When you are working with field service representatives that aren't employees of your company use this procedure. The field service representatives need to be defined as resources with the field service representative role assigned to show up in the Field Service Control Tower.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Resource Manager > Maintain Resources > Resources**.
3. Click **New**.
4. Enter all the appropriate information. For set up details please refer to *Oracle CRM Foundation Implementation Guide*.

5. On the Roles tab make sure the **Field Service Representative** Role Type and Role are selected.

1.3.1.5 Assign a Human Resource to an Applications User (Field Service Dispatcher)

The field service dispatcher needs to be assigned his Application user account. Use either this procedure or the next to establish this. We have already created a field service dispatcher Application user at the beginning and defined the field service dispatcher as an employee in human resources.

Steps

1. Switch to the System Administrator responsibility.
2. Navigate to **Security > User > Define**.
3. Search for the relevant Applications User Name.
4. At Person choose the human resource name from the list of values.
5. Save your work.

1.3.1.6 Assign an Applications User to a Resource (Field Service Dispatcher)

When you haven't used the previous procedure to assign the field service dispatcher his applications user name use this procedure in Resource Management. We have already created a field service dispatcher Application user at the beginning and because we defined him as an employee he automatically is also defined as a resource.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Resource Manager > Maintain Resources > Resources**.
3. In the Resource region select **Employee** from the Category list of values. Optionally choose the field service dispatchers Name.
4. Click **Find**. The Resource Search results window is opened.
5. Select the field service dispatcher and click **Resource Details**. The Resource window is opened.

6. At User Name select the appropriate Applications user name from the list of values.
7. Optionally you can assign the Field Service Dispatcher Role Type and Role on the Roles tab. This is not mandatory for field service dispatchers.
8. Save your work.

1.3.1.7 Create Field Service Dispatcher Groups

Create field service dispatchers groups. These groups are used to assign territories of service representatives to. Once a territory of service representatives is assigned to a dispatcher group it is shown to the field service dispatcher in the Field Service Control Tower. A dispatcher group can have one or more field service dispatchers.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Resource Manager > Maintain Resources > Groups**.
3. At Name enter a name for the dispatcher group you are creating.
4. Enter a Description.
5. On the Members tab, select Employee from the Category list of values.
6. Enter the employee number for the field service dispatcher you want to add to this dispatcher group.

For set up details please refer to *Oracle CRM Foundation Implementation Guide*

7. Save your work.

1.3.1.8 Create Territories (of Field Service Representatives)

You need to create territories with field service representatives assigned to them to be able to connect to the dispatcher groups. Use this procedure to create territories of field service representatives.

Steps

1. Change to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Territory Manager > Territory Administration**.
3. From the menu bar choose **Administration > Define Territory**.

4. On the Overview tab select **Oracle Service** from the list of values at Usage.
5. Enter a territory Name and Description.
6. At Transaction Type choose **Service Request and Task** from the list of values.
7. Select the Resources tab.
8. Enter all the field service representatives you want to add to this territory.
For more information on setup please refer to *Oracle CRM Foundation Implementation Guide*.
9. Save your work.

1.3.1.9 Create Territories (of Qualifiers)

Here you create territories to be used by the Assignment Manager and Oracle Scheduler to assign a task to a field service representative in the most effective way.

To create territories that can be used by Field Service for scheduling purposes you need to do the following:

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **CRM Foundation > Territory Manager > Territory Administration**.
3. From the menu bar choose **Administration > Define Territory**.
4. On the Overview tab select **Oracle Service** from the list of values at Usage.
5. Enter a territory Name and Description.
6. At Transaction Type choose **Service Request and Task** from the list of values.
7. Navigate to the Transaction Qualifiers tab or Resource Qualifiers tab
For more information on setup please refer to *Oracle CRM Foundation Implementation Guide*.

1.3.1.10 Generate Territory Packages

When you have created territories you need to generate territory packages.

Steps

1. Switch to the Field Service Administrator responsibility.

2. Navigate to **Other > View Requests**.
3. Check the **All My Requests** radio button.
4. Click **Submit a New Request**. The Submit a New Request window is opened.
5. Click **Single Request**. The Submit Request window is opened.
6. At Name select the **Generate Territory Packages** from the list of values.
7. At Parameters enter the following:
 - Usage: Oracle Service
 - Qualifier Type: Service Request and Task
 - Debug flag: Y
 - SQL Trace: Y
8. Click **OK**.
9. Click **Submit**.
10. To verify whether the Territory packages have been generated navigate to Other > View Requests.
11. Select **All My Requests** and click **Find**.

An overview is shown with the progress of the generating process. When the generation was successful it reads Completed.

1.3.1.11 Assign Territories to the Dispatcher Group

Navigate to the following page for details:

- [Assign Territories to Planner Groups](#)

1.3.2 Assigning Territories to Planner Groups

This setup screen is used to assign territories to planner groups. Planner groups are a group of resources (field service dispatchers) 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.

Prerequisites

Create a resource group with field service dispatcher(s) assigned to it in Resource Management. Create a territory with service representatives assigned to it in Territory Management.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Setup > Assign Territories to Planner Groups**. The Select Planner Group window is prompted.
3. Select the resource group that represents the planner group you want to assign territories to from the list of values.
4. Click **OK**. The Assign Territories to Planner Groups window is opened.
5. 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.
6. Save your work.

1.3.3 Generating 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: Planscope 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.

Perform the following tasks:

- [Define an executable](#)
- [Setup Concurrent Program](#)
- [Generate Shift Tasks](#)

1.3.3.1 Define an executable

Steps

1. Logon with the Field Service Administrator responsibility.
2. Navigate to **Concurrent > Program > Executable**.
3. Enter the following values into the fields:

Field	Value
Executable	Generate Shift Tasks
Short Name	CSFVGST
Description	Free, e.g. Generates departure and arrival tasks for field service representatives within a specific time frame.
Execution Method	PL/SQL Stored Procedure
Execution File Name	CSF_SHIFT_TASKS_PVT.Generate_Shift_Tasks

4. Click **Save**.

1.3.3.2 Set Up Concurrent program

Steps

1. Logon with the Field Service Administrator responsibility.
2. Navigate to **Concurrent > Program > Define**.
3. Enter the following values into the fields:

Field	Value
Program	Generate Shift Tasks
Short Name	CSFVGST

Field	Value
Application	Field Service
Description	Free, e.g. Generates departure and arrival tasks for field service representatives within a specific time frame.
Executable Name	CSFVGST
Executable Output format	Text

4. Click **Save**.

1.3.3.3 Generate Shift Tasks

Prerequisites

Setup of shifts in CRM Foundation 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.

1.3.4 Resources Subinventories Assignment

The resources to subinventories assignment screen is used to relate field service representatives to subinventories. For now resources will be service representatives, in future other type of resources might be available. When entering a material transaction in the Field Service Report the subinventories for the service representative are shown.

Steps

1. Logon with the Field Service Administrator responsibility.
2. Navigate to **Spares Management > Resources Subinventories Assignment**.
3. Enter the following values into the fields, perform these steps in sequential order.

Note: When the 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.

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	Field	Value
1.	Organization: Code	This field is populated with the code that was selected at the prompt 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	Select a resource type from the list of values.
4.	Resource	Select a service representative from the list of values.
5.	Subinventory	Select the subinventory you want to assign to the service representative.

Step	Field	Value
6.	Default	Select IN for good subinventory, OUT for bad subinventory and nothing for all other subinventories.
7.	Startdate	Select the start date for the assignment to be effective.
8.	Enddate	Select the end date for the assignment to be effective.

4. Click **Save**.

1.3.5 Defining Material Justification Codes

Material Justification codes are setup for Field Service Report. These justification codes are offered to the user from the Reason list of values when creating a material transaction line on the Field Service Report Materials tab.

Note: Please don't confuse with the Return Reason field on the Material tab from Field Service Report.

Prerequisites

None.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Field Service Report > Define Material Justification Codes**.
The Application Object Library: CSF _MATERIAL_REASON Lookups screen is opened.
3. The Type field is defaulted.
4. The User Name is displayed. It is used by loader programs.
5. The Application is defaulted.
6. In the Description field a description is given. You can modify this description.
7. In the Access Level region it is defined what changes are possible to a lookup type.
 - User: You can change any lookup code.

- Extensible: New lookup codes can be added. However, you cannot modify seeded lookup codes.
 - System: No changes to the lookup codes are allowed.
8. Create material justification lookup lines by entering the following information in the lower region on the window:

Field	Value
Code	<p>Enter the code value for your Lookup. You can define a maximum of 250 Lookups for a single Lookup type. When you enter a valid Lookup meaning into a displayed window field, Lookups stores this code into a corresponding hidden field. For example, the Lookup "Y" displays the meaning "Yes" but stores the code value "Y" in a hidden field.</p> <p>You cannot change the values in this field after committing them. To remove an obsolete Lookup you can either disable the code, enter an end date, or change the meaning and description to match a replacement code.</p>
Meaning	<p>When you enter a valid Lookup meaning into a displayed window field, Lookups stores the corresponding code into a hidden field. Lookups automatically displays the meaning in your Lookups field whenever you query your window. For example, the Lookup "Y" displays the meaning "Yes" but stores the code value "Y" in a hidden field.</p>
Description	<p>You can display the description along with the meaning to give more information about your Lookup.</p>
Tag	<p>Optionally enter in a tag to describe your lookup. The tag can be used to categorize lookup values.</p>
From and To	<p>Enter the dates between which this Lookup becomes active. If you do not enter a start date, your Lookup is valid immediately.</p> <p>Once a Lookup expires, users cannot insert additional records using the Lookup, but can query records that already use the Lookup. If you do not enter an end date, your Lookup is valid indefinitely.</p>

9. Check **Enabled** for each line you want to activate.
10. The double brackets ([]) identify a descriptive flexfield that you can use to add data fields to this window without programming.
11. Click **Save**.

1.3.6 Defining Labor Justification Codes

Labor Justification codes are setup for Field Service Report. These justification codes are offered to the user from the Reason list of values when creating a labor transaction line on the Field Service Report Labor tab.

Prerequisites

None.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Field Service Report > Define Labor Justification Codes**.
The Application Object Library: CSF _LABOR_REASON Lookups screen is opened.
3. The Type field is defaulted.
4. The User Name is displayed. It is used by loader programs.
5. The Application is defaulted.
6. In the Description field a description is given. You can modify this description.
7. In the Access Level region it is defined what changes are possible to a lookup type.
 - User: You can change any lookup code.
 - Extensible: New lookup codes can be added. However, you cannot modify seeded lookup codes.
 - System: No changes to the lookup codes are allowed.
8. Create labor justification lookup lines by entering the following information in the lower region on the window:

Field	Value
Code	<p>Enter the code value for your Lookup. You can define a maximum of 250 Lookups for a single Lookup type. When you enter a valid Lookup meaning into a displayed window field, Lookups stores this code into a corresponding hidden field. For example, the Lookup "Y" displays the meaning "Yes" but stores the code value "Y" in a hidden field.</p> <p>You cannot change the values in this field after committing them. To remove an obsolete Lookup you can either disable the code, enter an end date, or change the meaning and description to match a replacement code.</p>
Meaning	<p>When you enter a valid Lookup meaning into a displayed window field, Lookups stores the corresponding code into a hidden field. Lookups automatically displays the meaning in your Lookups field whenever you query your window. For example, the Lookup "Y" displays the meaning "Yes" but stores the code value "Y" in a hidden field.</p>
Description	<p>You can display the description along with the meaning to give more information about your Lookup.</p>
Tag	<p>Optionally enter in a tag to describe your lookup. The tag can be used to categorize lookup values.</p>
From and To	<p>Enter the dates between which this Lookup becomes active. If you do not enter a start date, your Lookup is valid immediately.</p> <p>Once a Lookup expires, users cannot insert additional records using the Lookup, but can query records that already use the Lookup. If you do not enter an end date, your Lookup is valid indefinitely.</p>

9. Check **Enabled** for each line you want to activate.
10. The double brackets ([]) identify a descriptive flexfield that you can use to add data fields to this window without programming.
11. Click **Save**.

1.3.7 Defining Expense Justification Codes

Expense Justification codes are setup for Field Service Report. These justification codes are offered to the user from the Justification list of values when creating an expense transaction line on the Field Service Report Expense tab.

Prerequisites

None.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Field Service Report > Define Expense Justification Codes**.
The Application Object Library: CSF_EXPENSE_REASON Lookups screen is opened.
3. The Type field is defaulted.
4. The User Name is displayed. It is used by loader programs.
5. The Application is defaulted.
6. In the Description field a description is given. You can modify this description.
7. In the Access Level region it is defined what changes are possible to a lookup type.
 - User: You can change any lookup code.
 - Extensible: New lookup codes can be added. However, you cannot modify seeded lookup codes.
 - System: No changes to the lookup codes are allowed.
8. Create expense justification lookup lines by entering the following information in the lower region on the window:

Field	Value
Code	<p>Enter the code value for your Lookup. You can define a maximum of 250 Lookups for a single Lookup type. When you enter a valid Lookup meaning into a displayed window field, Lookups stores this code into a corresponding hidden field. For example, the Lookup "Y" displays the meaning "Yes" but stores the code value "Y" in a hidden field.</p> <p>You cannot change the values in this field after committing them. To remove an obsolete Lookup you can either disable the code, enter an end date, or change the meaning and description to match a replacement code.</p>

Field	Value
Meaning	When you enter a valid Lookup meaning into a displayed window field, Lookups stores the corresponding code into a hidden field. Lookups automatically displays the meaning in your Lookups field whenever you query your window. For example, the Lookup "Y" displays the meaning "Yes" but stores the code value "Y" in a hidden field.
Description	You can display the description along with the meaning to give more information about your Lookup.
Tag	Optionally enter in a tag to describe your lookup. The tag can be used to categorize lookup values.
From and To	Enter the dates between which this Lookup becomes active. If you do not enter a start date, your Lookup is valid immediately. Once a Lookup expires, users cannot insert additional records using the Lookup, but can query records that already use the Lookup. If you do not enter an end date, your Lookup is valid indefinitely.

9. Check **Enabled** for each line you want to activate.
10. The double brackets ([]) identify a descriptive flexfield that you can use to add data fields to this window without programming.
11. Click **Save**.

1.3.8 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.

Steps

1. Switch to the System Administrator responsibility.
2. Navigate to **Profile > System**. The Find System Profile screen is opened.
3. Check **Site**.

4. At Profile enter **CSF%**.
5. Click **Find**.

You can set the profile options described in the following table in any sequence.

	Profile 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.
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: ConflictRule_L	<p>Profile option for the Field Service/Laptop application to handle updates to the CRM database from the mobile devices. Options are:</p> <ul style="list-style-type: none"> ■ Client wins. No timestamp checking is done, mobile record always overwrite record in CRM database. ■ Timestamp. When the last update date of the CRM record is greater then the last sync date (date when the mobile device originally got the record), the mobile record won't be applied to CRM. When the last update date of the CRM record is smaller or equal to the last sync date the mobile record will be applied to CRM.

	Profile Option	Description
8.	CSF: ConflictRule_M	<p>Profile option for the Field Service/Palm™ Devices application to handle updates to the CRM database from the mobile devices. Options are:</p> <ul style="list-style-type: none"> ▪ Client wins. No timestamp checking is done, mobile record always overwrite record in CRM database. ▪ Timestamp. When the last update date of the CRM record is greater then the last sync date (date when the mobile device originally got the record), the mobile record won't be applied to CRM. When the last update date of the CRM record is smaller or equal to the last sync date the mobile record will be applied to CRM.
9.	CSF: Return Reason	<p>Used to default a Return Reason on the Field Service Report window for a material line created. Select which one should be defaulted from the list of values. It's a mandatory field for Order Management. Especially use this profile option when working with one of the mobile applications.</p>
10.	CSF: Default Status Responsibility	<p>Choose a default responsibility to define which state transition rule is used. This profile option is set for the users from the mobile applications.</p>
11.	CSF: Database port to receive data	<p>Enter the port number of the hosting database.</p>
12.	CSF: Default travel distance for Time Distance Server	<p>If no geocode exist for a task the value is used as the default travel distance between two tasks.</p> <p>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.</p>
13.	CSF: Default travel duration for Time Distance Server	<p>If no geocode exist for a task the value is used as the default travel duration between two tasks.</p> <p>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.</p>

	Profile Option	Description
14.	CSF: History_L	Define the number of days for data to remain on Field Service/Laptop without editing it. When the number of days has expired it is removed from the Field Service/Laptop by the CRM Gateway for Mobile Devices.
15.	CSF: History_M	Define the number of days for data to remain on Field Service/Palm™ Devices without editing it. When the number of days has expired it is removed from the Field Service/Palm™ Devices by the CRM Gateway for Mobile Devices.
16.	CSF: InstalledBaseProduct_L	Define what information from the Installed Base you want to send to Field Service/Laptop: <ul style="list-style-type: none"> ■ 1 for just the product related to the Service Request. ■ 2 for the product related to the Service Request and the parent products. ■ 3 for the product related to the Service Request, the children, and parent products.
17.	CSF: InstalledBaseProduct_M	Define what information from the Installed Base you want to send to Field Service/Palm™ Devices: <ul style="list-style-type: none"> ■ 1 for just the product related to the Service Request. ■ 2 for the product related to the Service Request and the parent products.
18.	CSF: Last used service area on the map	This value is set automatically to store the last used service area on the map.
19.	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 .
20.	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.
21.	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.
22.	CSF: Map Move Factor (between 0.1 and 1)	Define how much you want the Field Service Map to move when using the navigation left/right and up/down arrows. Choose a value between 0.1 and 1.0 (centimeters).

	Profile Option	Description
23.	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.
24.	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.
25.	CSF: Replicate_Categories_L	Define if you want to replicate item categories to Field Service/Laptop: <ul style="list-style-type: none"> ■ 1 is Yes. ■ 2 is No.
26.	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.
27.	CSF: SID of the database	Enter the database name.
28.	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.
29.	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.
30.	CSF: Time distance cache radius	Leave empty.
31.	CSF: Time distance server calculation factor	If the factor is set the Time Distance Server calculates travel distance and duration faster but less accurate.
32.	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).
33.	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).