Oracle ® Field Service

Concepts and Procedures

Release 11*i*

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Oracle Field Service Concepts and Procedures, Release 11*i*

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Preface

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

This Concepts and Procedures guide provides information and instructions to help you work effectively with Oracle Field Service.

This preface explains how the Concepts and Procedures guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Field Service Dispatchers and Field Service Planners
- Field Service Representatives
- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility

Structure

This manual contains the following chapters:

“Understanding Field Service” provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application’s relationships to other Oracle or third-party applications.

“Using Field Service Control Tower” provides process-oriented, task-based procedures for using the application to perform essential business tasks.

“Using Field Service Report” provides process-oriented, task-based procedures for using the application to perform essential business tasks.

“Administering Oracle Field Service" provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities.

Related Documents

For more information, see the following manuals:

- *Oracle Field Service Implementation Guide*
- *Oracle CRM Foundation Concepts and Procedures*
- *Oracle Scheduler Concepts and Procedures*
- *Oracle Field Service/Laptop Concepts and Procedures*
- *Oracle Field Service/Palm™ Devices Concepts and Procedures*
- *Oracle Field Service/Wireless Concepts and Procedures*

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Understanding Field Service

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Topics covered are:

Introduction to the Field Service Suite

The Oracle Field Service suite supports an automated process used by service organizations to manage their field service operations. It assists in the entire service process from taking the customer call to fixing and reporting on the problem at a customer site.

The Field Service suite offers a range of products to meet your organization's business needs. Visualized in the following graphic is the relation between the products in the suite. From Service Request we go to Field Service. In Field Service we call upon the Assignment Manager or Scheduler, they both make use of CRM Foundation Calendar. When working with a mobile device we move on to the CRM Gateway for Mobile Devices. Either Field Service/Laptop or Field Service/Palm™ Devices is addressed now. You can use reporting functionality through Field Service Report on the Enterprise server (referred to as connected Field Service Report), or on the mobile device (referred to as disconnected Field Service Report). The table following the graphic contains a description for each product of the Field Service suite as displayed in the graphic.

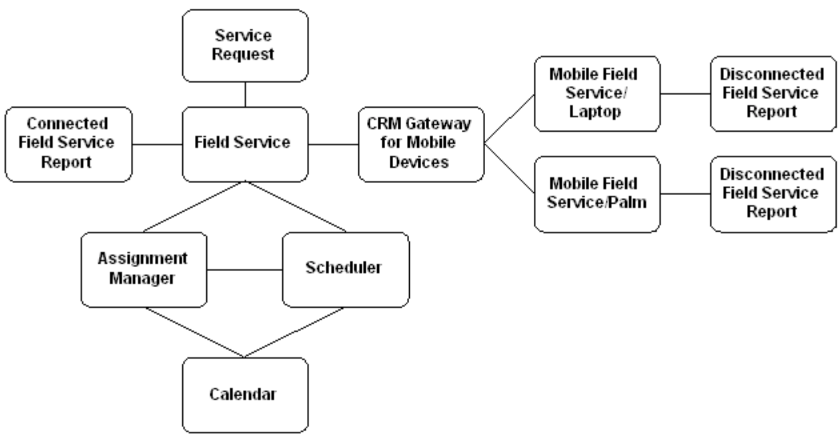


Table 1 Field Service Suite Products

Suite Product	Description
Field Service	The Field Service application assists in assigning tasks to service representatives, creating and dispatching daily schedules, and monitoring progress.

Table 1 Field Service Suite Products

Suite Product	Description
CRM Gateway for Mobile 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.
Field Service/Laptop	This is a remote application typically installed at a service representatives laptop to receive his daily schedule and report on progress.
Field Service/Palm™ Devices	This is a remote application for a handheld device so a service representative can receive his daily schedule and report on progress.
Assignment Manager	Assignment Manager is a foundation component. It assists in the assigning of ownership of documents and tasks and the availability needed to perform a task to qualified resources.
Scheduler	Scheduler enables optimization of scheduling capabilities of tasks to qualified resources.
Calendar	Calendar is a foundation component. It is used to define availability and non-availability of a resource.
Connected Field Service Report	Connected Field Service Report is used to report on labor, materials used, and expenses accrued on the CRM application side. Connected it is also used to report counter readings.
Disconnected Field Service Report	Disconnected Field Service Report is used to report on labor, materials used, and expenses for the mobile client side. It is a part of the Field Service/Laptop and Field Service/Palm™ Devices application.

Field Service Overview

Field Service is an essential part of the Field Service Application Suite. At the core of Field Service is the Control Tower which allows the field service dispatcher to plan, dispatch, and monitor all field service activities, ultimately ensuring that the right person is in the right place at the right time.

The features of Field Service include:

- Task assignment
- Scheduling and dispatching capabilities
- Monitoring service representatives activities
- Managing parts information
- Field service reporting

Task assignment is assisted by the use of the Assignment Manager.

When Oracle Scheduler is installed, you can optimize your scheduling capabilities.

The Field Service Process

The entire field service process includes four major areas. The process is initiated by the creation of a field service request. To perform service out in the field, tasks are assigned to the service request. The Field Service application then assigns these tasks to service representatives. At the end the service representative reports on the performed tasks. This process is driven by service request status and task status changes. The task status flow is specific to the Field Service application and therefore explained in more detail below.

Reviewed in more detail is:

- The Field Service Process
- Task Status Flow

The Field Service Process

The four major steps in the field service process are visualized in the graphic below. The Field Service application supports step 3 and 4 in the field service process. All steps are described in sequence in the table following the graphic.

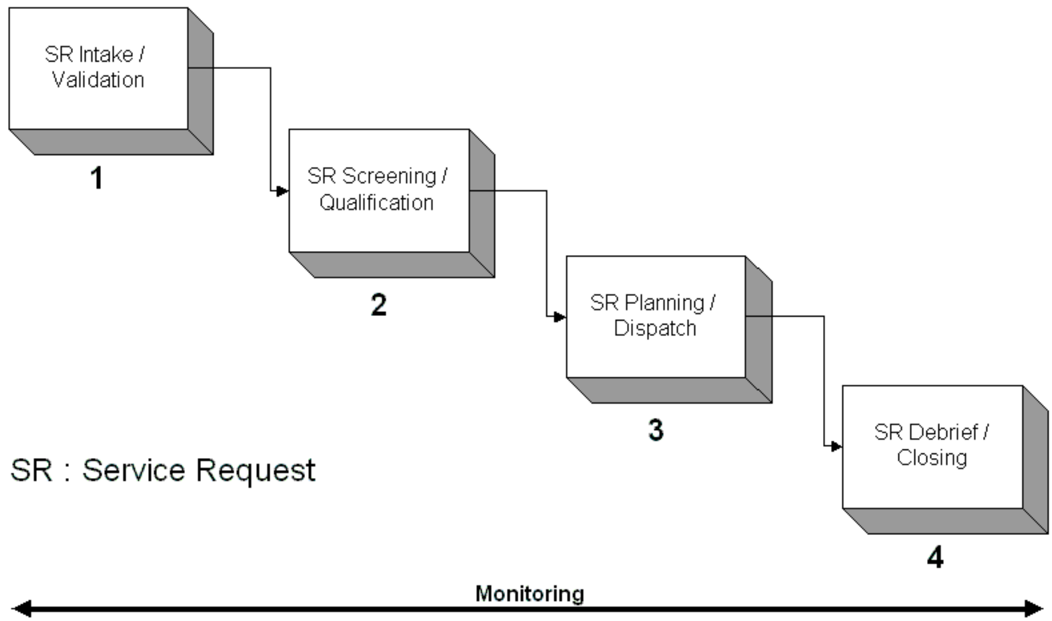


Table 2 Steps in the Field Service Process

Step		Description
1.	Field Service Request Intake & Validation	When a customer contacts the field service department, an agent creates a new service request. The call center agent enters customer information into the service request form and validates this information if necessary.
2.	Field Service Request Screening & Qualification	The service request is analyzed by a support agent who searches the knowledge base for a solution and creates a task based on the problem description and action needed to solve the problem.
3.	Field Service Request Planning & Dispatch	Once a task is created, it can be assigned to a single or multiple resource for completion. The resource receives notification and progress on the task is monitored.
4.	Field Service Request Closing and Reporting.	When a resource has completed a task, he reports on labor time, materials used, and expenses accrued. The task is closed by the dispatcher or service representative.

Note: Depending on your organization these steps may be separated or combined.

Task Status Flow

Tasks change status during the field service process of assigning tasks. Depending on the status different actions are possible. Tasks statuses show up in the control tower enabling the dispatcher to keep track of tasks and their status. The following table lists all tasks statuses, their behavior, and possible statuses to change to.

Table 3 Seeded Tasks Statuses

Task Status	Behavior	Following Statuses
In Planning	The task is ready for planning or already assigned to a service representative. The planner is still optimizing the schedule and can assign the already assigned task to another service representative.	Assigned/ Canceled
Assigned	Task is assigned to a service representative and the schedule is ready to be committed.	Accept/ Reject/ Working/ Completed/ Canceled
Accepted	The task is accepted by the service representative. Reporting on the task is possible.	Reject/ Working/ Canceled
Rejected	The task is rejected by the service representative. The dispatcher can change it back to assigned to enforce the service representative to accept it or change it to in planning to assign it to another service representative. Reporting on the task is possible.	In Planning/ Assigned/ Accept/ Working/ Canceled
Working	The service representative started working on the task. The actual start time is entered, enabling the dispatcher to view progress on the schedule and view predicted start times of tasks scheduled next. Reporting on the task is possible.	Interrupted/ Completed/ Canceled

Task Status	Behavior	Following Statuses
Interrupted	The work on a task has stopped. The dispatcher can assign it to another service representative changing the status to in planning or assign it to the same service representative at a later point in time. The service representative can also continue working on the task. Reporting on the task is possible.	In Planning/ Assigned/ Working/ Completed/ Canceled
Canceled	The task is canceled. The dispatcher can assign it to the same representative again or change or to another service representative. Reporting on the task is possible.	In Planning/ Assigned/ Closed
Completed	The task is done and frozen. No updates or reporting on the task is allowed.	Closed
Closed	The field service report for the task is reviewed and pushed to charges. Updates to the installed base and knowledge base are made.	

What is the Field Service Control Tower?

The Field Service Control Tower is a one stop planning area where you can plan, dispatch, and monitor tasks for service representatives out in the field. A planner can view all incoming tasks within his or her responsibility and then assign these tasks to create a trip for each service representative. A trip includes all the tasks assigned to one service representative within a working day. A trip consists of a start time and location, which is defined as a departure task, and an end time and location, which is defined as an arrival task. All tasks are scheduled between the departure and arrival tasks. In addition to dispatching tasks, the control tower allows you to monitor service representative's progress, and report on tasks and schedules using the plan board and gantt. You can also make last minute changes to schedules and view your service group's status and location on the map.

In the top region of the control tower screen, you can view all incoming tasks, customer information, planned start and end dates, and actual scheduled times for a selected customer.

Included features are:

- Bolded Tasks. This indicates that a task is ready for planning.

- Advise Button. Opens the Assignment Manager screen so you can assign a single task using selection criteria from either the Assignment Manager or Scheduler.
- Auto-Assign Button. Automatically assigns a task or multiple tasks using the selection criteria from Assignment Manager or Scheduler.

The tab pages below allow you to view trips, schedules, report on tasks, and monitor progress. The following tab pages exist:

- Plan Board
- Gantt
- Map
- Spares
- Statistics

Plan Board Features

The plan board contains a grid populated with the service representatives name, departure and arrival times, scheduled tasks for the day, as well as the customer's address. From the plan board you can:

- View service representatives trips for the day.
- Access service representatives calendars.
- Access service request or task, source details.
- Assign tasks.
- Report on performed tasks.
- Optimize trips.
- Send Messages.

Gantt Features

The Gantt chart view is a quick graphical overview of the scheduled tasks based on time. The date range shown by default is two days before the actual date and two weeks ahead of it. The date range is adjustable. From the gantt you can:

- View daily schedules with tasks shown in green or red (escalated) bars, travel time transparent, and shifts in yellow.
- View progress on tasks for service representatives.

- View predicted schedules.
- View task description.
- Move tasks from one service representative to another.
- Access service request details.

Map Features

The Map is a quick graphical overview of a service representative's real time location and status. You can also assign tasks to service representatives or view tasks with their location. The date shown for the map is the actual date. From the map you can easily:

- View the location of service representatives.
- View the status of service representatives.
- View the location of tasks.
- Assign tasks.
- Access service request details

Spares Features

The Spares tab enables you to view spares transactions for tasks, as well as move and order spares for tasks. From spares you can easily:

- View spares transactions for a selected task.
- Move and order spares.
- Access the Spares Management application.

Statistics Features

The Statistics tab shows a statistical analyses of field service activities for your organization in a diagram over a period of time. The date range shown and used for representation by default, is two days before the actual date and two weeks ahead of it. The date range is adjustable. From statistics you can:

- Review escalations over a period of time.
- Review owned tasks over a period of time.

Overview of Field Service Report

A field service report documents information related to a specific task performed at a customer site. Use Field Service Report to record all the day to day activities out in the field. This would include parts used/recovered, expenses made, and labor time used. Once the information is collected and captured on the screen, you can update the customer's installed base, maintain your spares inventory, and update charge information.

The main features in Field Service Report are:

- Reporting on Materials
- Reporting on Expenses
- Reporting on Labor

Reporting on Materials

The Materials tab records and updates all material transactions performed while at work at the customer site. These transactions include parts usage/recovery and Installed Base updates.

Initially one item is associated with a service request. This could be an item from a customers installed base, or an item from the Inventory list. One or more tasks are created for this service request and you create a field service report for a specific task. It is even possible to create multiple field service reports for a task when multiple resources are assigned to a task. You can report several material transactions for one or more items on the field service report. For each material transaction a separate line is created on the field service report. This line includes information about:

- The part recovered from the customer site or taken out of an Installed Base: in which subinventory it is stored, the reason for taking it out or recovering it, and what needs to be done with it.
- The part(s) used or put in an Installed Base at the customers site: what part has been put in/used, from which subinventory, the quantity (for Installed Base items this would be one), and why. An Installed Base related material transaction automatically results in a parts used transaction to update Inventory.

Based on the material transaction type chosen a set of mandatory fields need to be filled out on the Field Service Report. Additionally you can take down specific material information such as serial numbers, or lot numbers when applicable. When dealing with a material transaction like a replacement for a customers Installed Base you need to define what part you have taken out of the customers Installed Base and what part you are putting back in very carefully. This is done on two material lines.

When done you update Inventory, Installed Base, and Charges. The Inventory update results in activities to maintain the level of materials in the subinventories, e.g a warehouse or a service representatives car, by supplying them with new materials or to retrieve materials from them. The Installed Base update results in an update of the items in the customers Installed Base. The Charges updates results in checking what material is covered by contract and what needs to be invoiced to the customer.

Reporting on Expenses

On the Expenses tab you can document expenses accrued during your visit. For each expense transaction a separate line is created on the field service report. It is possible to select a predefined expense item with a related cost or to enter the actual costs made. This can include expenses like driving costs, parking tickets, and meals. Based on the expense transaction type chosen different fields need to be filled out on the Field Service Report.

You only need to update Charges to make sure these costs are covered by contract or need to be invoiced to the customer.

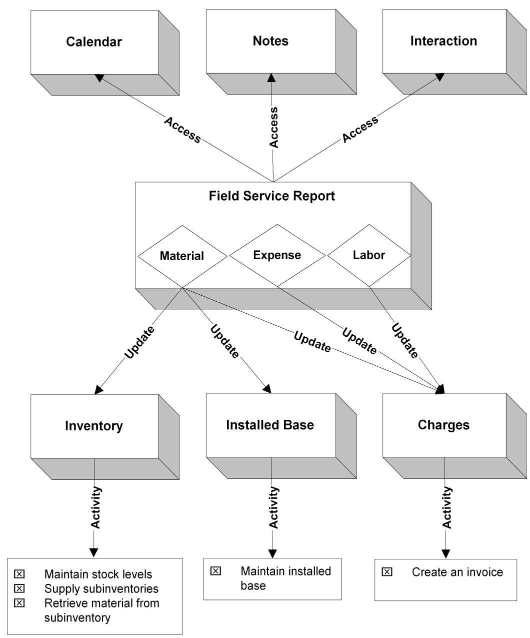
Reporting on Labor

On the Report tab you can report labor time as well as record your car mileage. For each labor transaction a separate line is created on the field service report. Select a predefined labor item to report on.

You only need to update Charges to make sure these costs are covered by contract or need to be invoiced to the customer.

How Field Service Report Relates to ERP and CRM

Field Service Report is integrated with many other Oracle CRM and ERP Applications. The following figure visualizes this integration. It shows you how you can access Calendar, Interaction, and Notes, and how information from Field Service Report updates Inventory, Installed Base and Charges.



Calendar

You can manage your schedule from the Calendar datebook. The datebook contains working hours and task assignment as well as non-available working hours like holidays or sick days. Access Calendar from the Field Service Report screen.

Interactions

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. Access Interactions from Field Service Report.

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.

Charges

You can update Charges with parts usage, counter information, labor time, and expenses for a task. When the Charges check box is selected, all information recorded is transmitted to the Charges database on Update. Make sure you update each tab on the Field Service Report separately in order to update Charges. In Charges this information is checked against any contracts and a final invoice is generated.

You cannot edit reported information in Field Service Report once it has been transmitted to Charges successfully.

Inventory

You can update Inventory from Field Service Report with parts usage for a task. Updating Inventory is done to maintain stock levels at different locations, subinventories. A subinventory could be a warehouse or a service representatives vehicle. Updating Inventory results in activities to supply these warehouses or service representatives with new materials or to retrieve materials from them.

You cannot edit reported information in Field Service Report once it has been transmitted to Inventory successfully.

Installed Base

You can update a customer's Installed Base from Field Service Report. Updating Installed Base results in an update of the items of the customers Installed Base.

You cannot edit reported information in Field Service Report once it has been transmitted to Installed Base successfully.

Quick Menu

Use Quick Menu, which is available on your tool bar, to navigate to the following applications and screens:

- Installed Base
- Service Request

- Spares Management

The applications are populated with the corresponding task or service request information you had opened a Field Service Report for.

Using Field Service Control Tower

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Provided are two scenarios to take you through the application, for more information, see Choosing a Field Service Scenario.

Choosing a Field Service Scenario

Choose one of the following scenarios to guide you through the application:

- Creating a Schedule

  Use this scenario if you are planning a schedule for a field service representative.

- Monitoring Progress and Managing the Schedule

  Use this scenario if you are managing the daily activities of field service representatives.

Creating a Schedule

Perform the following tasks in the recommended order to create a schedule for your field service representatives:

1. View the plan board.
2. Find Tasks.
3. View Spares.
4. Schedule a Task or Tasks:
   a. Manually.
   b. With help from the Assignment Manager.
   c. Automatically.
5. View the Schedule:
   a. On the plan board.

   b. On the gantt.

6. Recalculate a Service representative's Trip (Scheduler only).
7. Commit the Schedule.

Monitoring Progress and Managing the Schedule

Perform the following tasks to monitor progress on the schedules and act in order to keep the schedule up to date and accurate.

1. View Status:
   a. On the plan board.
   b. On the gantt.
   c. On the map.
2. View spares.
3. Re-assign a task.
4. Cancel a task.
5. Recalculate a service representatives trip.
6. Create additional tasks.
7. Create a new service request.
8. Report on tasks.
9. Complete a task.
10. View statistics.

Viewing the Plan Board

Use the plan board to view scheduled tasks for a service representative or a group of service representatives. You can also assign tasks, optimize the schedule, and access calendars and service request details.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. Select the Plan Board tab. The tasks and trips for the current day are shown.
3. Click **More** to enlarge the plan board.
4. Select **Date** to change the date to view.
5. Click **Refresh** to repopulate the plan board.
6. Click **Territories** to choose the group or groups of service representatives you want to view on the plan board.
7. Click **Goto Resource** to focus on a specific service representative. The service representatives name is highlighted and visible on the plan board.
8. Right clicking the service representatives name on the plan board brings up a popup menu.
9. Click **Show Calendar** to view the service representatives personal calendar.
10. Click **Recalculate Trip** to optimize a service representatives trip. The Scheduler needs to be installed to perform this task.
11. Right clicking a task brings up a popup menu.
12. Click **Show Source Document** to open the screen the task is created from.
13. Click **Debrief** to report on a performed task. The Field Service Report screen is opened.
14. Click **Send Message** to send a message to another user.
15. Click **Assign Task** to assign a task to the service representative.
16. Click **Return** to decrease the plan board.

Finding Tasks

Use this procedure to populate the control tower with tasks. Once you have populated the control tower with tasks, you can assign them or review them.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Put your cursor in one of the task detail fields in the upper half of the Control Tower.
3. Click **Find**. The Find Tasks screen appears.
4. Enter information to retrieve the kind of tasks you want to view. Check the **Schedulable** box to select only tasks ready for scheduling.
5. Click **Find**. The upper half of the control tower is populated with tasks. Tasks that are shown in bold are schedulable.
6. Select and right click on a service request number to show the service request with details for that particular task.

Viewing Spares

Use spares to view part transaction information for a selected task, access the spares management application, or view detailed information on ordered parts.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Select the Spares tab. The first time the spares tab is selected during a session choose an organization from the list of values that pops up.
3. Click **More** to enlarge Spares.
4. Click **Territories** to choose the group or groups of service representatives you want to view spares for.

5. Click **Goto Resource** to focus on a specific service representative.
6. Select a task from the upper part of the control tower, you don't need to check it. The parts and transactions for the selected task are shown.
7. To view details for a part, click the numbered link in the **Order** column.The Parts Order Entry screen appears.
8. Click **Spares Mgmt** to enter the Spares Management application. The Spares Planner's Desktop screen is opened.
9. Click **Return** to decrease spares.

Scheduling a Task Manually

You can assign a task to a field service representative directly from the plan board or map. Use this procedure to schedule a single task for one or more service representatives.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Populate the control tower with tasks.
3. Check the box next to the task you want to schedule.
4. When you are scheduling a single task for multiple resources, check the **Add** box.
5. There are several options to plan manually:
   - On the Plan Board, select an empty cell in the service representatives trip and click the right mouse button. Click **Assign Task** from the popup menu.
   - On the Map, double click on a service representative of your choice.
6. Click Refresh to repopulate the plan board or map.
7. Repeat this procedure if you are scheduling a single task for multiple resources.

Scheduling with Help from the Assignment Manager

Use this procedure to access the Assignment Manager to assist in assigning a task to a qualified resource.

Use this procedure to schedule a single task for one or more service representatives.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Select a task for scheduling by checking it.
3. When you are scheduling a single task for multiple resources check the **Add** box.
4. Click the **Advise** button. The Assignment Manager screen is opened. Click **Help** for details.
5. Confirm the assignment by clicking **Ok**. The Plan Board and Gantt are refreshed.
6. Repeat this procedure if you are scheduling a single task for multiple resources.

Scheduling a Task or Tasks Automatically

You can schedule a task automatically directly from the plan board. Use this procedure to schedule a task or multiple tasks automatically.

Prerequisites

None

Steps

1. Navigate to the Control Tower.
2. Select a task for scheduling by checking it. Check the **Select All** box to select all tasks at once.
3. Click the **Auto-Assign** button.
4. The Plan Board and Gantt are refreshed.

Viewing the Gantt

Use the Gantt to view progress on the dispatched schedules. A time line is shown to indicate the current date and time.

Scheduled tasks show up in blue bars, escalated tasks show up in red bars, and travel time is shown as a transparent beginning of a scheduled task (Scheduler functionality). Shifts are indicated in yellow. Use the scroll bars in Resource and ganttchart to view more details or dates.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. Select the Gantt tab.
3. Click **More** to enlarge the Gantt.
4. Select a date at **From** and **To** to define a date range you want to view.
5. Click **Refresh** to repopulate the gantt.
6. Click **Territories** to choose the group or groups of service representatives you want to view on the Gantt.
7. Click **Goto Resource** to focus on a specific service representatives schedule. The service representatives name is highlighted and visible.
8. Right click the date or time on the ganttchart header to change the view of the ganttchart.
9. View task description by moving the mouse over a task. A task description is shown.
10. To view task details double click a task. The source document is opened showing the task details. For a service request task the Service Request screen is opened.
11. Click **Scheduled times** to view the schedules send out to the service representatives.
12. Click **Predicted times** to view progress on the schedules. Based on the actual times reported by the service representatives on tasks performed a prediction of the start times of following tasks is shown.

13. Click **Return** to decrease the Gantt.

Viewing the Map

On the map the service representatives are shown in a geographical representation with an easy to view status. Use this procedure to learn the possibilities of using the map.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. Select the Map tab.
3. Enter the user-id/password of the geographical database at the left of the **Init** button.
4. Click **Init**. The last saved geographical area is shown.
5. To change map or reset the view, choose it from the list of values in the Service Area.
6. Click **Reset**. The map is shown in it's entirety.
7. Click **More** to enlarge the Map.
8. Click **Territories** to choose the group or groups of service representatives you want to view on the map. Instant status is shown with a graphical representation for each service representative.
9. Use the Zoom and Navigate buttons to navigate through the map. You can also draw a box on the map with your pointer device to zoom in to that particular area.
10. Click on a service representative. **Resource name** and **Task details** are shown for the selected service representative.
11. To view a task or tasks on the map select them from the upper half of the control tower by checking them and click **Show**. The selected tasks with their location are shown on the map.
12. Double click on a task for details. The Service Request screen is opened showing the Task tab.

13. Click **Clear** to remove the tasks from the map.

> **Note:** The tasks remain checked in the upper half of the control tower.

14. Click **Save** to save your current map settings, this is used to display the map the next time you use the map.
15. Click **Refresh** to update the status of the service representatives.
16. Click **Return** to decrease the map.

Recalculating a Service Representatives Trip

Use this procedure to update and optimize a service representatives trip after assigning tasks. This will eliminate time conflicts within the trip and reset the scheduled start times of all tasks in the trip, accordingly.

Prerequisites

Scheduler must be installed.

Steps

1. Navigate to the Control Tower.
2. Select the Plan Board.
3. Select the service representatives name and right click it. The popup menu appears.
4. Click **Recalculate Trip**.
5. Perform this procedure again to recalculate a trip for another service representative.

Canceling a Scheduled Task

Use this procedure to cancel a scheduled task. Once a task is canceled you can choose to schedule it again or close it.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. To cancel a task:
   - Click the **Find** button to search for the task. Select a task by checking it and change **Status.**
   - Select the Plan Board or Gantt to debrief on the task.
3. On the Plan Board or Gantt right click on the task you want to cancel. The popup menu appears.
4. Click **Debrief**. The Field Service Report screen is opened.
5. Click **Update Task**.
6. Change **Task Status**.
7. Click **Save**.
8. Return to the Control Tower.
9. Click **Refresh**. Task status is changed on the Plan Board and Gantt.

Re-assigning a Task

Use this procedure to move an already assigned task from one service representative to another.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. Select the Gantt tab.
3. Select a task in the service representatives trip, drag and drop it onto the service representative you want to assign the task to.
4. Click **Undo** to cancel the drag and drop action.

Creating Additional Tasks

Use this procedure to create additional tasks for an existing service request from the Control Tower.

Prerequisites

None.

Steps.

1. Navigate to the Control Tower.
2. To create additional tasks:
   - Select the service request you want to create an additional task for from the upper half of the control tower and right click it. The Service Request screen is opened.
   - Select the Plan Board and right click on a task with corresponding service request number from a service representatives trip. Select S**how Source Document**. The source screen is opened.
3. Click **Help** for more information.

Creating a New Service Request

Use this procedure to create a new service request. This can not be done when working in the Control Tower.

Prerequisites

None.

Steps

1. Navigate to Service Request > Service Requests > Create Service Request. The Service Request screen is opened.
2. Click **Help**.

Reporting on Tasks

Use this procedure to report on performed tasks on labor, parts, expenses, and counter readings. For more information, see also Field Service Report.

Prerequisites

None.

Steps.

1. Navigate to the Control Tower.
2. Select the Plan Board.
3. Select the task you want to report on and right click it. The popup menu appears.
4. Click **Debrief**. The Field Service Report screen is opened.
5. Click **Help** or follow this link.

Completing a Task

Use this procedure to change the task status to complete from the control tower. This is normally done when reporting on time, material, and expenses in the Field Service Report.

Prerequisites

None.

Steps

1. Navigate to the Control Tower.
2. To complete a task:
   - Click the **Find** button to search for the task. Select a task by checking it and change **Status.**
   - Select the Plan Board or Gantt to debrief on the task.
3. On the Plan Board or Gantt right click on the task you want to complete. The popup menu appears.
4. Click **Debrief**. The Field Service Report screen is opened.

5. Click **Update Task**.
6. Change **Task Status**.
7. Click **Save**.
8. Return to the Control Tower.
9. Click **Refresh**. Task status is changed on the Plan Board and Gantt.

Viewing Statistics

Use this procedure to view an analysis on the performance of your service organization.

Prerequisites

None.

Steps.

1. Navigate to the Control Tower.
2. Select the Statistics tab.
3. Click **More** to enlarge the window.
4. Click **Territories** to choose the group or groups of service representatives you want to view in your statistics.
5. Select a date at **From** and **To** to define a date range for your statistic data to be presented.
6. Choose an option from the drop-down list.
7. Click **Refresh**. The statistic data is presented for the date range defined.

Selecting Territories

Use this procedure to select a group or groups of service representatives. The control tower shows information for the group or groups selected.

Prerequisites

None.

Steps

1. Make a selection from the territories assigned to you.
2. To view territories not assigned to you check the **Show all territories** box.

Committing the Schedule

Use this procedure to change task status for all tasks for a selected date. This is done to commit to the schedule so it get's communicated to the service representatives.

Prerequisites

None.

Steps

1. Navigate to Commit Schedule.
2. Make a selection from the list of values at **From Status**.
3. Make a selection from the list of values at **To Status**.
4. At **Scheduled Date** enter the date you want to commit the schedule for.
5. Click **OK** to change the task status.

Using Field Service Report

This topic group provides process-oriented, task based procedures for using Field Service Report.

Topics covered are:

- Opening a Field Service Report
- Viewing Notes
- Accessing your Calendar
- Viewing Interactions
- Entering Materials
- Entering Expenses
- Entering Labor Time
- Recording Car Mileage
- Updating a Field Service Report
- Updating a the Task Assignment Status

Opening a Field Service Report

Use this procedure to create or open a field service report for a task.

Prerequisites

None

Steps

1. (N) Field Service Representative > My Tasks.

   (N) Field Service Manager/Dispatcher > Field Service Report.

   The Find Tasks window appears.

2. Place your cursor in any of the fields. Select the desired name or number from the list of values, or enter it.

   To search for a Resource Name, first choose Employee Resource Type from the Resource Type list of values.

3. Click **Find**. A list with resources and tasks appears in the Results region. The Service Report column shows if a report has already been created or not.

4. Double-click on one of the lines in Results, or select it and click **OK**, to open a field service report or to create one. The Field Service Report screen is opened with the task information populated.

Viewing Notes

For each task a note might have been added. Use this procedure to view notes and create notes.

Prerequisites

None

Steps

1. Navigate to the Field Service Report screen.
2. Click **Notes**. The Notes screen is opened. When a note was created for this task, you can view it here.
3. Click **New** to create a note for the task.
4. For detailed instructions please click the **Help** icon.

Accessing your Calendar

At any time you can access your Calendar from field service report. Use this procedure to open your calendar.

Prerequisites

None.

Steps

1. Navigate to the Field Service Report screen.
2. Click **Calendar**. The Calendar screen is opened.
3. For detailed instructions please click the **Help** icon.

Viewing Interactions

An interaction is contact between a customer, customer system, or a potential customer and a human or automated agent. From this contact an activity, business act, has taken place by an agent or an automated agent. Use this procedure to view the interactions and activities for a customer.

Prerequisites

None.

Steps

1. Navigate to the Field Service Report screen.
2. Click **Interactions**. The Customer Interaction History screen is opened.
3. For detailed instructions please click the **Help** icon.

Entering Material

When at work out in the field you need to report on the materials used. This information is necessary to maintain your supply of materials, maintain the customers installed base, and to be able to invoice the customer for the materials used. You enter materials information at line level and update inventory, installed base, and charges for a specific line. Use this procedure to report on material transactions for a task.

Prerequisites

A task with a status to report on.

Steps

1. Navigate to the Field Service Report screen.
2. Select the Materials tab.
3. Choose a Transaction Type from the list of values. This is the activity you are going to perform for the material you are reporting on. Based on this selection fields need to populated further down the material line. Fields that are greyed out don't need to be populated. Fields that are white are optional and fields that are yellow are mandatory.
4. Choose one of the following options from the Parts Used/Recovered list of values:
   - **Recovered Parts** to report on a material recovered from the item at the customers site. This can be taken out of the customers Installed Base.
   - **Used Parts** to report on a material used from your subinventory at the customers site. This can be put into the customers Installed Base.

   When only one option is possible for the Transaction Type chosen previously, the value is defaulted.
5. From the Item list of values select the material you are going to create a material transaction for. The item number is shown in the Item field. The Item Description field is populated with a description for the item.
6. The UOM is defaulted but you can choose to select a different UOM from the list of values.
7. Enter the amount of the material used at **Qty**.
8. Choose the Subinventory from the list of values you are taking the material out of.

In case of Recovered Parts choose a subinventory specifically designated for recovered parts.

9. Enter the serial number for the material when applicable.

   In case of Recovered Parts for an item with a serial number, the serial number is defaulted once the Item is selected.

10. Enter a Locator, Rev (revision), or Lot (lt number) when applicable.

    When the item is location, revision, or lot controlled the values in Locator, Rev, and Lot are defaulted once the Item is selected.

11. Choose a Service Date from the date picker. The system date is defaulted.
12. Optionally choose a Reason for the material transaction from the list of values.
13. The Disposition field is defaulted once the Item is selected.
14. Choose the Parent Product for the item from the list of values in case of an Installed Base item.
15. Choose the material taken out of the Installed Base from the Recovered Product list of values.
16. Choose an appropriate value from the Parts Status list of values for the material put in.
17. Choose a Return Reason from the list of values for the Recovered Product. Depending on the setup of the application this value could be defaulted.
18. The Channel Code field is populated automatically. It shows whether the resource that created the field service report is a connected user or a disconnected user. A disconnected user created the field service report from a mobile device.
19. Click **Save**. The material line is saved.
20. Make sure the Installed Base, Inventory, and Charge check boxes are checked and click **Update**.

    Check the Charges, Inventory, and Installed Base fields at the end of the material line to view the upload status. It reads succeeded or failed.

Guidelines

You can create multiple material transaction lines before saving and updating. For replacements you always need at least two material transaction lines, one for the part taken out and one for the part put back in.

Entering Expenses

You can use the Expenses tab to report any expenses accrued during a customer visit. Expenses may include a meal or driving costs. Use this procedure to enter expenses.

Prerequisites

A task with a status to report on.

Steps

1. Navigate to the Field Service Report screen.
2. Select the Expenses tab.
3. Choose a Transaction Type from the list of values. This is the activity you are going to perform for the expense you are reporting on.
4. Select the Item you are going to create an expense line for. The Item Description field is populated with an extended description for the item.
5. Depending on the Transaction Type chosen you either enter the UOM and Quantity or the Amount and Currency.
6. Choose a Service Date from the date picker. The system date is defaulted.
7. Optionally choose a Justification for the expense from the list of values.
8. The Channel Code field is populated automatically. It shows whether the resource that created the field service report is a connected user or a disconnected user. A disconnected user created the field service report from a mobile device.
9. Click **Save**. The expense line is saved.
10. Make sure the Charge check box is checked and click **Update**.

    Check the Charge Status field at the end of the expense line to view the upload status. It reads succeeded or failed.

Guidelines

You can create multiple expense lines before saving and updating.

Entering Labor Time

When at work out in the field you need to record the hours spend on a task.Use this procedure to enter detailed labor information.

Prerequisites

A task with a status to report on.

Steps

1. Navigate to the Field Service Report screen.
2. Select the Labor tab.
3. Choose a Transaction Type from the list of values. This is the activity you are going to perform for the labor you are reporting on.
4. Select the Item you are going to create a labor line for. The Item Description field is populated with an extended description for the item.
5. The UOM is defaulted but you can choose to select a different UOM from the list of values.
6. Enter the Start and End time for the labor.
7. Optionally you can record your car mileage by entering the values at Starting and Ending.
8. Choose a Service Date from the date picker. The system date is defaulted.
9. Optionally enter a Reason for recording the labor line, or choose an option from the list of values.
10. The Channel Code field is populated automatically. It shows whether the resource that created the field service report is a connected user or a disconnected user. A disconnected user created the field service report from a mobile device.
11. Click **Save**. The labor line is saved.
12. Make sure the Charge check box is checked and click **Update**.

    Check the Charge Status field at the end of the labor line to view the upload status. It reads succeeded or failed.

Guidelines

You can create multiple labor lines before saving and updating.

Recording Car Mileage

Optionally you can record the amount of driving distance. It can be used for administrative purposes. Use this procedure to record your car mileage.

Prerequisites

You need to create a labor line.

Steps

- Please follow the steps from Entering Labor Time. You have to create a labor line in order to record your car mileage.

Updating a Field Service Report

Once you have created your service report, you can update Installed Base, Charges and Inventory. Use this procedure to update information in the database.

Prerequisites

You must first create a task.

Steps

1. Navigate to the Field Service Report screen.
2. Select the Material, Expense, or Labor tab.
3. Select the appropriate boxes (Inventory, Charge, Installed Base) depending on where you want the updated information to go.
4. Click **Update**.
5. Perform this procedure for each tab.

Note: Once you have updated Inventory, Charges, and Installed Base, you cannot make changes in Field Service Report.

Updating the Task Assignment Status

If you are debriefing on a task, you may want to update the assignment status. Use this procedure to update the assignment status.

Prerequisites

None

Steps

1. Navigate to the Field Service Report screen.
2. In the Assignment Status field, select the new task status from the list of values.
3. Click **Save**.

Guidelines

If there is more than one task assignment related to a task, then all task assignments must be closed in order for the task to be closed. This occurs when multiple field service representative are assigned to the same task.

Administering Field Service

This topic group provides process-oriented, task-based procedures needed for ongoing system maintenance.

Topics covered are:

- Setting up Resource Relations
- Assigning Territories to Planner Groups
- Resources Subinventories Assignment
- Generating Shift Tasks
- Profile Options

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

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*.

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.

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*.

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.

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.

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.

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.

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.

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*.

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.

Assign Territories to the Dispatcher Group

Navigate to the following page for details:

- Assigning Territories to Planner Groups

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.

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

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**.

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
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**.

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.

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.
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**.

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.

	Profile Option	Description
7.	CSF: ConflictRule_L	Profile option for the Field Service/Laptop application to handle updates to the CRM database from the mobile devices. Options are: ▪ **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.
8.	CSF: ConflictRule_M	Profile option for the Field Service/Palm™ Devices application to handle updates to the CRM database from the mobile devices. Options are: ▪ **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	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.
10.	CSF: Default Status Responsibility	Choose a default responsibility to define which state transition rule is used. This profile option is set for the users from the mobile applications.
11.	CSF: Database port to receive data	Enter the port number of the hosting database.

	Profile Option	Description
12.	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.
13.	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.
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: ■ **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: ■ **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.

	Profile Option	Description
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).
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: ▪ **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).

	Profile Option	Description
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).