

Oracle® Field Service/Laptop

Implementation Guide

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1 Implementing Field Service/Laptop

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

Topics covered are:

- [Implementation Overview of Field Service/Laptop](#)
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1.1 Implementation Overview of Field Service/Laptop

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

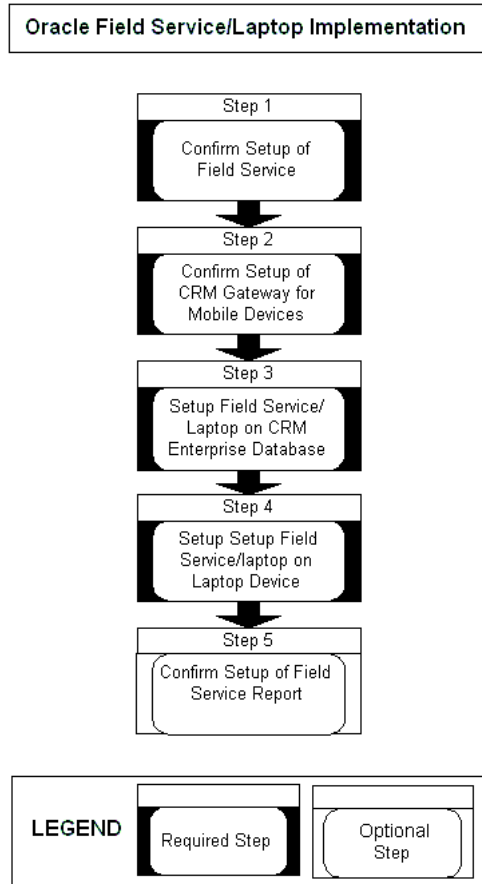
- Oracle Field Service
- Oracle CRM Gateway for Mobile Devices

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

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

1.1.1 Implementing Flowchart

The following flow chart shows the recommended order:



1.1.2 Implementing Checklist

Complete the following implementation steps in sequential order.

Step	Required	Step Title
1.	Yes	Confirm Setup of Field Service
2.	Yes	Confirm Setup of CRM Gateway for Mobile Devices
3.	Yes	Setup Field Service/Laptop on the CRM Enterprise Database
4.	Yes	Setup Field Service/Laptop on the laptop device
5.	Optional	Confirm Setup of Field Service Report

1.2 Implementing Steps

Perform the following implementation steps in sequential order:

1.2.1 Step 1: Confirm Setup of Field Service

Make sure Field Service is fully implemented and setup as described in the *Oracle Field Service Implementation Guide*.

1.2.2 Step 2: Confirm Setup of 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.

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 and:

- Create Mobile Users

1.2.3 Step 3: Setup Field Service/Laptop on the CRM Enterprise Database

Make sure you installed Field Service/Laptop as described in *Field Service/Laptop Installation Guide*.

Make sure you setup Field Service/Laptop on the CRM Enterprise database. This step involves the following tasks:

- [Agenda Layout](#)
- [Configuration Parameters](#)
- [User Defined Queries](#)
- [Resources Subinventories Assignment](#)
- [Field Service Report Types](#)
- [Field Service Report Manager](#)
- [Profile Options](#)

Please refer to *Setting Up Field Service/Laptop and Oracle Field Service/Palm™ Devices* for details.

1.2.4 Step 4: Setup Field Service/Laptop on the Laptop Device

Make sure you setup Field Service/Laptop on the laptop device. This step involves the following tasks:

- [Enabling Communication on the Laptop Device](#)

Please refer to Setting Up Field Service/Laptop and Oracle Field Service/Palm™ Devices for details.

1.2.5 Step 5: Confirm Setup of 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, like Field Service/Laptop, all transactions are shown and updated to Inventory, Installed Base, and Charges from the Field Service Report.

Make sure Field Service Report is fully implemented and setup as described in the *Oracle Field Service Implementation Guide*.

1.3 Setting Up Field Service/Laptop and Oracle Field Service/Palm™ Devices

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

Setup Screen	Laptop	Palm	Description
Agenda Layout	V		Change the agenda layout to your own preference by showing/hiding columns, rearranging the display of the columns, and change header names.
Configuration Parameters			Within Parameters you have five tabs:
<ul style="list-style-type: none"> ■ General tab 	V		To define display of progress clock.
<ul style="list-style-type: none"> ■ Agenda tab 	V		To define up to what point service representatives are allowed to make changes to their agenda, and to register car mileage.
<ul style="list-style-type: none"> ■ Parts tab 	V		To define part related options.
<ul style="list-style-type: none"> ■ SR Explorer tab 	V		To define service representatives right to edit or add tasks or service requests.
<ul style="list-style-type: none"> ■ Mail tab 	V	V	To define send mail options.
<ul style="list-style-type: none"> ■ Buttons tab 	V		To configure the Dashboard buttons
User Defined Queries	V		It is possible to create your own queries and add them to the standard Field Service/Mobile tables. These queries can be used in the Service Request Explorer, Views, and Field Service Report to present information the way you would like it to appear.
Resources Subinventories Assignment	V	V	Used to relate resources to su inventories.
Field Service Report Types	V		Define the name of the Field Service Report you want to create.
Field Service Report Manager	V		Used to customize the created Field Service Report types and decide which ones are presented on the service representatives laptop.

Additionally make sure the profile options are set:

- [Profile Options](#)

1.3.1 Agenda Layout setup screen

Use the Agenda Layout setup screen to customize the Agenda layout.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Field Service/Mobile > Agenda Layout**.
3. The Agenda Layout window is opened:

Options

Perform the steps that take you through the setup screen described in the following table in any order.

Step	Option	Description
1.	Visible	Select the check boxes to hide or show a column in the Agenda
2.	Datacolumn	Make a selection from the Datacolumn drop-down list to arrange the order of the columns displayed. The selection on top displays as the first column on the left side of the Agenda.
3.	Header	In the Header column the name displayed for the column in the Agenda can be changed

4. Save your work.

1.3.2 Setting up Configuration Parameters

Use this procedure to configure the Field Service/Laptop and Field Service/Palm™ Devices applications.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Field Service/Mobile > Configuration Parameters**.
3. Address the following tabs:
 - [General](#)
 - [Agenda](#)

- [Parts](#)
- [SR Explorer](#)
- [Mail](#)
- [Buttons](#)

General tab

The general tab is used to define the settings of the progress clock on the dashboard.

Options

Perform the steps for setup described in the following table in any order.

Step	Option	Description
1.	Progress clock: Show duration of day	The progress clock on the dashboard will show progress on your working day. Working hours are predefined and will start after turning the ignition key.
2.	Progress clock: Show duration of task	The progress clock on the dashboard will show progress on the estimated duration of the task when task status has been set to working.

Agenda tab

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

Options

Perform the steps for setup described in the following table in any order.

Step	Option	Description
1.	Show Field Service Report when service representative completes task	Select to open the Field Service Report window automatically when a service representative marks a task as completed.
2.	Allow changes to a completed task	Select to enable the service representative to edit a task when task status has been marked as completed. When deselected this option can prevent conflicts with third party products that do not allow updates to completed tasks.

Step	Option	Description
3.	Allow changes to Agenda's in past	Select to make service requests and tasks that were scheduled in the past reappear in the Agenda until the tasks are completed or canceled.
4.	Days to look back for not started tasks	Decide for how many days you want the not completed or canceled service request and tasks reappear in your agenda.
5.	Round-off time	Use this to round off the times that service representatives entered. The start time is rounded off to the nearest interval backward in time and the end time to the nearest interval forward in time.
6.	Agenda and mail refresh wait time	Specify the number of seconds the Agenda should wait before refreshing the screen. This can help with performance and speeding up the system
7.	Mileage unit of measure	Must be set to match mileage system
8.	register of car mileage: area	To prompt the service representative to register the car mileage on the specified actions: Start of day, Finish of day, Start of task, Finish of task.

Parts tab

The parts tab is used to define part related options.

Options

Perform the steps for setup described in the following table in any order.

Step	Option	Description
1.	Allow stock levels below 0	Is selected by default, this option is useful when the electronic information on delivery of a part to a service representative is behind of the physical delivery of a part to a service representative. A service representative can still report on the use of the part although it is not defined as delivered to him on his laptop yet.
2.	Show the time with the date information	Select to display detailed time and date information on part movements. This can only be displayed when it is supported by the logistic system.
3.	Allow edit serial numbers	Select if you want the service representative to update on the serial numbers of parts out in the field

SR Explorer tab

The SR Explorer tab is used to define service representatives right to edit or add tasks or service requests.

Options

Perform the steps for setup described in the following table in any order.

Step	Option	Description
1.	Add service request	Select to allow a service representative to add a service request.
2.	Edit service request	Select to allow a service representative to edit a service request.
3.	Add task	Select to allow a service representative to add a task.
4.	Edit task	Select to allow a service representative to edit a task
5.	Default task duration	Available when a service representative is allowed to add a task. Define the default task time when a task is created.

Mail tab

The mail tab is used to define send message options.

Options

Perform the steps for setup described in the following table in any order.

Table 1-1

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

Buttons tab

The buttons tab is used to define the buttons on the left side of the dashboard. There are 7 buttons to define.

Options

Perform the steps for setup described in the following table in any order.

Step	Option	Description
1.	User Defined Buttons: 1.	Select from the drop down list what is activated and displayed on the button.

4. Save your work.

1.3.3 Creating User Defined Queries (Views)

The user-defined queries are applied throughout the Field Service/Laptop application. They are used to customize selection criteria and information that is presented to the user, in:

- the Service Request Explorer window
- the Views window
- the Field Service Report window

The queries are SQL Select -statements that retrieve records from the Field Service/Mobile database. In order to create or modify user-defined queries you must have some knowledge of SQL Select-statements and the Field Service/Mobile database lay out.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Field Service/Mobile > User Defined Queries**.
3. The The User Defined Queries window is opened:

Options

Perform the steps that take you through the setup screen described in the following table in sequential order.

Step	Option	Description
1.	Query	Select a query if you want to edit it. Select an empty row to create a new query and type the title of the new query.
2.	Form name	Select from the drop-down list where to use the query in the application.

Step	Option	Description
3.	Remote query	Check this box if you are creating an SQL Select-statement that will be performed on the central database. Uncheck if you want the query to be performed on the local database. Note: To perform a query on the central database the service representative must be able to establish a connection to the central database.
4.	For table	Depending on the selection in the Form name option you can select from the drop-down list which table is concerned.
5.	Refresh rate	The rate to refresh the Mobile device.
6.	SQL-Query	Enter the SQL Select-statement. The WHERE-clause for user prompts and system variables cannot be used when you are adding or editing a query for the Field Service Report window.
7.	Check	You can use the check button to see if you are using the correct syntaxes in the SQL Select-statement you wrote. This can only be done when you have checked the Remote query option and therefore are performing an SQL Select-statement on the central database.

4. Save your work.

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.
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 Field Service Report Types

In the Field Service Report types setup screen you can define the names for the reports you want to create on the Field Service/Laptop application.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Field Service/Mobile > Field Service Report Types**.
3. The Field Service Report Types window is opened:

Options

Perform the steps that take you through the setup screen described in the following table in any order.

Step	Option	Description
1.	Field Service Report Type	Enter a name for a Field Service Report type of your choice. This will be used in the Field Service Report Manager setup screen for customizing.

4. Save your work.

1.3.6 Customizing Field Service Reports

To customize Field Service Reports you use the Field Service Report Manager setup screen. This will affect the layout of the Field Service Report on the service representatives laptop.

Prerequisites

A Field Service Report type must be available or created first.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Field Service/Mobile > Field Service Report Manager**.
3. The Field Service Report Types window is opened. Enter the name of the field service report you want to customize by entering the field service report type.
4. Click **OK**. The Field Service Report Manager window is opened:

Options

Perform the steps that take you through the setup screen described in the following table in sequential order.

Step	Option	Description
1.	Type	Select what type of field service report you want to create from the drop-down list.
2.	Name	If necessary change the name of the field service report that will appear on the service representatives laptop. This will not change the field service report type name.
3.	Item Pattern	Enter an Item Pattern.
4.	Task Type Name	Enter the Task Type Name.
5.	Header	Enter the text you want to appear in the header of the field service report. Note: Always end the text with .alx otherwise it won't show up in the header.
6.	Footer	Enter the text you want to appear in the footer of the field service report. Note: Always end the text with .alx otherwise it won't show up in the header.
7.	Default	Check the box to make the field service report appear on the service representatives laptop as an option to present information. Note: You cannot show field service reports with the same Type, you can select them only once.

5. Save your work.

1.3.7 Profile Options for Field Service/Laptop

Make sure to set the following profile options for Field Service/Laptop.

Prerequisites

None.

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 described in the following table in any sequence:

Profile Option	Description
CSF: ConflictRule_L	Profile option for the Field Service/Laptop application to handle updates to the CRM database from the mobile devices. Options are: <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.
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.
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.
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.
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.
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.

5. **Save** and close.
6. Open **System** again. The Find System Profile screen is opened.
7. At Profile enter ASG%.
8. Click **Find**.

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

ASG Field Service/Laptop Organization ID	All items from the inventory for the organization selected are replicated to Field Service/Laptop.
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9. Save your work.

1.3.8 Enabling Communication on the Laptop Device

To enable data transport between the Oracle CRM enterprise database and the Laptop device the CRM Gateway for Mobile Devices is installed. User accounts are created on the CRM Gateway for Mobile Devices and this information needs to be defined within the Field Service/Laptop application to enable the communication between the Oracle CRM enterprise database and the Laptop device. This process is also known as synchronization.

To enable wired or wireless communication the connection type needs to be defined as well.

Prerequisites

An user account on the CRM Gateway for Mobile Devices.

Steps

Performed on the laptop device.

1. Click the **Start** button from the task bar.
2. Select **Programs**.
3. Select **Oracle Field Service Laptop > Oracle Field Service Laptop**. The login dialog box appears.
4. Enter your UserId and Password. Click **OK** when you have finished.

5. Click the **Option Form** button from the toolbar. The Options screen is opened.
6. Select the Communications tab.
7. At **Server Address** enter the CRM Gateway for Mobile Devices server address.
8. At **Server Port** enter the CRM Gateway for Mobile Devices port number.
9. At **Num of retries** enter how often you want to retry synchronizing data when it fails because you are out of mobile network coverage. When the number of retries entered didn't succeed the data is send at another point in time.
10. At **Retry timeout** enter the number of seconds between each retry.
11. At **User ID** enter the user id for the CRM Gateway for Mobile Devices.
12. At **Password** enter the password for the CRM Gateway for Mobile Devices.
13. Choose a Connection Type:
 - Check Radio for wireless communication.
 - Check Phone for wired communication.

1.4 Documentation Accessibility

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