Oracle® Field Service/Laptop

Concepts and Procedures

Release 11*i*

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

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Preface

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

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

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

Intended Audience

This guide is aimed at the following users:

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

Structure

This manual contains the following chapters:

“Understanding Oracle Field Service/Laptop" 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 Oracle Field Service/Laptop” provides process-oriented, task-based procedures for using the application to perform essential business tasks.

“Administering Oracle Field Service/Laptop" 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:

- *Implementing Oracle Field Service/Laptop*
- *Oracle Field Service Concepts and Procedures*

Understanding Field Service/Laptop

This topic group provides overviews of the Field Service/Laptop application, as well as Field Service/Laptop relationship to other Oracle or third-party applications.

The topics covered in this topic group are:

- About Field Service/Mobile
- Overview of Field Service/Laptop
- Field Service/Laptop Features

About Oracle Field Service/Mobile

Field Service/Laptop and Field Service/PalmTM Devices are remote applications that work with the Oracle Field Service application. These remote applications let you access your field service information while on the road. You can work independently from the corporate network and then synchronize your changes back to the central database, either over a phone line, a LAN/WAN, or by wireless connection.

The Oracle Field Service/Laptop Device

Field Service/Laptop provides all the data you need to perform your service tasks while away from your office. To be effective, the data residing on the Laptop device needs to be regularly updated with Field Service and data that you have entered into your Laptop device needs to be transferred to Field Service. This process of transferring data to and from your Laptop device is known as synchronization.

The 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. The CRM Gateway for Mobile Devices sends correct data to each service representative. It only transports changed, new, or missing data because it knows what data resides on each device. The CRM Gateway for Mobile Devices also acts as the communication server. Based upon transaction priority it decides if information needs to be sent wireless or if it can wait until manual synchronization. This is an economic way to manage wireless communication.

Overview of Field Service/Laptop

Oracle Field Service/Laptop is a standalone, wireless connectivity solution that provides service representatives with real time access to service information. It provides consistent service by supporting on the road service representatives with precise, up-to-date information about the service schedule assigned to them by the dispatcher.

Service representatives receive the following dispatched information:

- Service request number, severity, type, and status
- Tasks assigned to the service request, task status, priority, and definition
- Resolution date and time expectation
- Parts information
- Problem and solution notes
- Details on customer and installed base
- Counter readings

The service representative reports on the following:

- Service request severity and type
- Task status, task type, and task definition
- Labor, parts, and expenses (by means of field service report)
- Counter readings
- Problem and solution (by means of notes)

Navigating Through Laptop

You can navigate through the application using the buttons on the dashboard. By clicking a button from the dashboard you select what screen you are opening and a corresponding toolbar appears. The toolbar is shown on the top of the screen. There are elements on the toolbar that apply to all the screens and there are elements that are screen specific.

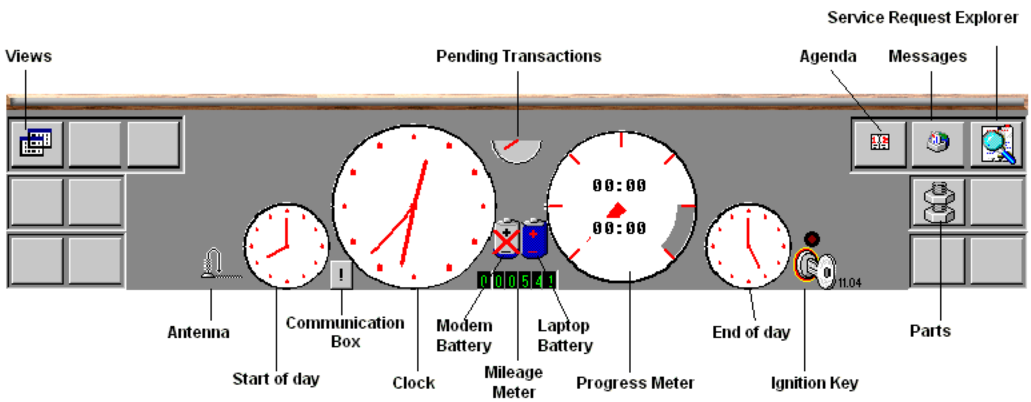
- The Dashboard

The Dashboard

Use the dashboard to navigate through the Field Service/Laptop windows and monitor the progress of your working day. The dashboard is displayed on the lower half of your screen.

There are buttons on the right and left side of the dashboard. The buttons on the left can be configured or activated as desired. Ask your administrator for more information. The buttons on the right side are fixed application buttons to navigate through the screens.

The Field Service/Laptop Dashboard



Refer to the preceding table for an explaination of dashboard icons:

Item	Description
Antenna	Up when wireless communication is possible. Down when it is not.
Start of day	Displays start of day when ignition key is clicked.
!	Displays a communication box on the left to show received tasks send by the dispatcher. Click to close the box.
Clock	Displays the time.
Modem Battery	Indicates power level of modem battery.
Laptop Battery	Indicates power level of laptop battery.

Item	Description
Mileage Meter	Shows the last registered car mileage of the service representatives vehicle.
Progress Meter	Indicates progress on current task or time elapsed in day.
End of day	Displays end of day time when ignition key is clicked to end the work day.
Ignition Key	Clicked to start the work day and clicked again to end it. Light will turn on when clicked to start the work day.
Parts	Opens the Parts screen.
Service Request Explorer	Opens the Service Request Explorer screen.
Messages	Opens the Messages screen.
Agenda	Opens the Agenda screen.
Pending Transactions	Displays number of unsent Tasks. **Note** : Do not stop the Laptop device while pending transactions exist.
Views	Optional button, opens the Views screen.

Field Service/Laptop Features

- Agenda
- Messages
- Service Requests
- Tasks
- Service Request Explorer
- Views
- Parts
- Field Service Report
- Counters
- Field Service/Laptop Screen Flow

Agenda

The Agenda displays the service requests and tasks assigned to you by the dispatcher. These service requests and tasks are sent to you electronically and are presented in the agenda in a daily view with a sequential time order. You can easily start recording labor time for a task, create multiple labor lines for a task, or change task status. All changes are applied to the agenda immediately.

The Agenda is divided into columns that you can customize to meet your own needs. Drag the right border of a column heading to the right or left. The display of the Agenda can be customized. Ask your administrator for more information.

Access information screens by double-clicking parts of the Agenda.

Watch for any color changes on the agenda. For example, if you pass the start time of task, the color of the start time text turns to red.

Messages

In the Oracle Field Service/Laptop there is a message system. Messages is used to send messages to the dispatcher or other service representatives and receive messages from them.

The system provides:

- Sending a new message from anywhere within the application
- Viewing incoming and sent messages.

Service Requests

A service request is created when a customer contacts your organization with a problem. Typically, the customer representative analyzes the service request and assigns a task to it. Then the service request is sent to you out in the field along with detailed information about the service request and all related tasks. You can view information such as detailed address information, additional notes, and an overview on the installed base and related tasks.

Update service requests on type, severity, problem, and solution, this information is stored in the knowledge base. The knowledge base is used to analyze the problem when a customer contacts your organization.

Create new service requests when necessary. This is normally only done with approval of the dispatcher/planner. This option might be blocked by your administrator.

Tasks

A task is considered a unit of work. There are two kinds of tasks in the Field Service/Laptop application. There are the service request tasks and the personal tasks. The service request tasks are created during field service request screening and qualification in the office, or when working out in the field. These tasks are related to a specific problem that needs to be resolved through a service request.The personal tasks are created by yourself to block time in your agenda.

Update task status in order to keep the schedule up to date and inform the dispatcher on the progress of your schedule. Update tasks also on type, and definition.

Create additional tasks when necessary. This option might be blocked by your administrator.

Service Request Explorer

Use the Service Request Explorer to search for customer, product, or service request information. The information is always presented with the customers and products on the left-hand side of the screen and the related service requests and tasks on the right-hand side of the screen.There are several default search options available. Contact your administrator for more options.

Views

Use the Views window to generate reports detailing the service information that is present on your Laptop device. Select the type of view you want to generate from the options presented to you in the Views screen.

The type of view you are able to generate depends on the set of views that is created for you by default. Contact your administrator for more information about creating additional types of views.

Parts

When performing a service out in the field, you must be able to locate, order, and report parts. There are two kinds of part types: task related parts and non-task related parts. The difference between the two is the way the parts are handled and the options presented to you to do so.

The task related Parts screen enables you to view and report on transactions of parts that are related to the task, such as:

- View car stock and inventory
- Ordering parts for the task selected
- Ship parts for the task selected
- Reporting on returned parts for the selected task
- Reporting on used parts for the selected task

The non-task related Parts screen enables you to view and report on parts that are not related to tasks, such as:

- View car stock and inventory
- Order parts that are not related to a customer or task
- Ship parts
- Report on returned parts
- Report on used parts

Field Service Report

When you have completed a task, you must document the time, material and effort involved in completing that task. Field Service Report is used to view, add, and update on labor time, parts used, and expenses accrued for the specific task or service request. The field service report is divided into sections to access and store this information.

You can print the field service report as a work form or job sheet, and the look can be customized to your needs. By default some options will be given, contact your administrator for more options.

Make sure everything is reported correctly, an invoice based on the information from the field service report is generated when the task information has been synchronized. Report on the following:

- Reporting on Labor, define the different types of labor performed to complete a task, this can also be done from the Agenda.
- Reporting on Parts, report on all the materials involved to complete a task, the task related Parts screen is opened to do so. For more information see Parts Features.
- Reporting on Expenses, define the different types and amount of expenses made to complete a task.

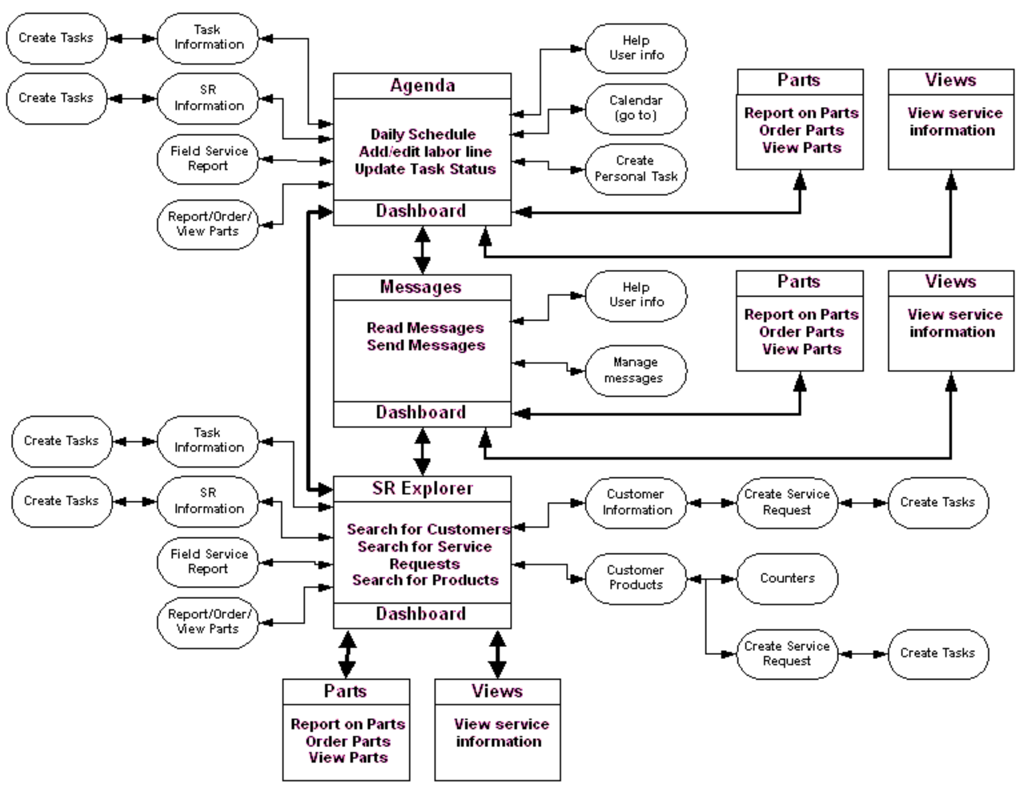
Counters

A counter is an entity that records usage of a product. A lot of machines you are servicing contain one or multiple counters for all kinds of purposes. This could be a gas meter, a water meter but also a copier, or a printer could contain a counter. A selection of counters with their last reading on the machine you are servicing have been sent along with this task.

Field Service/Laptop Screen Flow

The screen flow shows the relation between the different screens in the application and where and how to access the information you need.

Field Service/Laptop Screen Flow



Using Field Service/Laptop

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

Topics covered in this topic group are:

- Managing Your Agenda
- Managing Messages
- Managing Service Requests
- Managing Tasks
- Managing Parts
- Managing Field Service Reports
- Managing Service Request Explorer
- Generating Views
- Managing Counters

Managing Your Agenda

Use the Agenda screen to access tasks and service requests, and report on tasks completed at the customer site.

- Recording Your Working Hours
- Viewing Agendas
- Updating Task Status
- Adding Labor
- Editing Labor

Recording Your Working Hours

The Start of Day and End o f Day clocks display your working hours. Your working hours are also recorded in the Field Service application. Use this procedure to record your working hours.

Prerequisites

None

Steps

1. From the dashboard, double-click the **Ignition Key** to start recording your working hours. The ignition key turns to the right.

   A non-service request related entry appears in your agenda with the start time. This is your start time.

2. Double click the **Ignition Key** again to stop recording your working hours. The ignition key returns to a vertical position.

   You will see that the end time in the Agenda entry is filled out.

Guidelines

If necessary, record your working hours at intervals during the day.

Viewing Agendas

You can look at the future or past agendas. Use this procedure to view current, future, or past agaendas.

Prerequisites

None

Steps

1. Click the **Agenda** button on the dashboard. The Agenda window appears.
2. Click the **Calendar** button from the toolbar. The Select date screen appears.
3. Double click on the date of your choice. The Agenda screen for the selected date is shown.

Guidelines

Depending on the setup during implementation, you can make changes to the agenda, ask your administrator for more information.

Updating Task Status

When you have completed your task the task status needs to be updated. This information is used to update and monitor the service schedule.

Prerequisites

None

Steps

1. Click the **Agenda** button on the dashboard. The Agenda window appears.
2. To update the status of the task double-click the Task Status column for the specific task. The Choose Task Status screen opens.
3. Choose a task status from the drop-down list and click the check mark to save the settings.

Adding Labor

A task might have several labor items that need to be performed. Report on labor time when performing a task.

There are two ways to report on labor time: from the Field Service Report screen or from the Agenda screen. To report on labor time from the Field Service Report screen see Adding or Editing Labor.

Prerequisites

None

Steps

1. Click the **Agenda** button on the dashboard.
2. Create a labor line for a task by double-clicking the corresponding field from the Actual Start column. The New Labor Item screen opens.
3. From the drop-down lists, choose a Labor Item and a Transaction Type and select the checkbox to save the settings.

   In the Agenda the service request and the task line will change color and an entry is made in the Actual Start column and labor column.
4. Enter the end time for the labor by double-clicking the corresponding field from the Actual End column. The Rounded off time screen opens.

5. Select a date and time for the labor to end, and select the checkbox to save the settings.

Guidelines

Add a labor line each time you start working on it.

Editing Labor

Use this procedure to change the labor item or start and end time.

Prerequisites

None

Steps

1. Click the **Agenda** button on the dashboard.
2. Change the labor item for a task by double-clicking the corresponding field from the Labor column. The Update Labor Item Screen opens.
3. Make a selection from the **Labor Item** and **Transaction Type** drop down lists.
4. Change the labor time for a task by clicking the corresponding field from the Actual Start or Actual End column. The Rounded off time screen opens.
5. Change the start and/or end time for the labor.
6. Select the checkbox to save the settings.

Managing Messages

The following tasks can be performed regarding messages:

- Managing your Messages
- Sending Messages

Managing your Messages

You can quickly send a message from anywhere within the application or manage your messages more extensively.

Prerequisites

None

Steps

1. Click the **Messages** button on the dashboard. The Messages screen opens.
2. From the toolbar, click the **Show/Hide Folder List** to show or hide the folder list on the left side of the screen.
3. From the toolbar, click the **Inbox** to view an read received messages.
4. From the toolbar, click the **Outbox** to view and read sent messages.

Sending Messages

You can quickly send a message from anywhere within the application.

Prerequisites

None

Steps

1. From the toolbar select the **Send New Message** button. The new mail message window opens.
2. Enter the address of the receiver at **To**.
3. To use an existing address click the **Address** button.

Note: This functionality is optional and depends on the message options granted to you. Ask your system administrator for more information.

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4. Click **Send**.

Managing Service Requests

The following tasks can be performed for service requests:

- Managing Service Request Information
- Updating Service Request Information
- Viewing Service Request Address Information
- Viewing and Updating Problem and Resolution
- Viewing Installed Base
- Creating a Field Service Request

Managing Service Request Information

A lot of information about the service request has been send along with the schedule. You are able to view and update this information.

There are two ways to navigate to the Service Request Information screen: from the Agenda and from the Service Request Explorer.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Click the **Information** button from the toolbar.
3. Double-click on the specific service request.
   - In the Agenda from the SR Status column.
   - In the Service Request Explorer from the Service Requests column, the service request is indicated with an icon.

   The Service Request Information screen opens.
4. To view information on the service request click the **Service Request** tab. Service request type and Service Request Notes are shown. For more information see Updating Service Request Information.

5. To view address information click the **Address** tab. Detailed information about the customers address is shown.
6. To view suggested problem and resolution information click the Problem/Resolution tab. For more information see Viewing and Updating Problem and Resolution.
7. To view the installed base click the Installed base tab. A tree with the installed base at the customer is shown as well as Installed Base Notes.

Updating Service Request Information

When working on a task in the field, you may need to update the service request if the task or customer information changes. Use this procedure to update a service request. Use this procedure to update service request information.

Prerequisites

None

Steps

1. Click either the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.

   You can access the service request through the Agenda or Service Request screen.
2. Click the **Information** button from the toolbar.
3. Double-click on the specific service request.
   - In the Agenda from the SR Status column.
   - In the Service Request Explorer from the Service Requests column, the service request is indicated with an icon.

   The Service Request Information screen opens at the Service Request tab.
4. To update on the Service Request Type select another option from the **Service types** drop-down list.
5. Click **Service Request Notes**. The Notes screen opens.
6. Click **Add New Notes** to enter information about the changes made.

Viewing Service Request Address Information

Every service request contains detailed address information for your customer. Use this procedure to view detailed address information.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.

   You can access the service request through the Agenda or Service Request screen.

2. Select the **Information** button from the toolbar.
3. Double-click on the specific service request.
   - In the Agenda from the SR Status column.
   - In the Service Request Explorer from the Service Requests column, the service request is indicated with an icon.

   The Service Request Information screen appears.

4. Click the Address tab. You are now able to view specific address information.
5. Click the **Address Notes** button to view additional address information. The Notes screen is opened.
6. Click the **Add New Notes** button to add a note regarding the task address like a change of address.

Viewing and Updating Problem and Resolution

Every service request contains a problem and resolution description. If either the problem or resolution changes after completing the task, you can update this information. Use this procedure to view and update the problem or resolution information.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.

   You can access the service request through the Agenda or Service Request screen.

2. Click the **Information** button from the toolbar.
3. From the service request column, double-click on the specific service request. The Service Request Information screen opens.
4. Select the Problem/Solution tab.
5. To change the problem and/or solution note make a selection from the corresponding drop-down lists.
6. To add a note select the Service Request tab.
7. Click the Service Request Notes button. The Notes screen is opened.
8. Click the **Add New Notes** button to add a note regarding the problem or resolution for the service request.

Viewing Installed Base

You can view the installed base from the service request. Use this procedure to view the installed base.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.

   You can access the service request through the Agenda or Service Request screen.

2. Select the **Information** button from the toolbar.
3. Double-click on the specific service request.
   - In the Agenda from the SR Status column.
   - In the Service Request Explorer from the Service Requests column, the service request is indicated with an icon.

The Service Request Information screen opens at the Service Request tab.

4. Click on the Installed Base tab. A tree with the installed base is shown.
5. Click the **Installed Base Notes** button to view additional address information. The Notes screen is opened.
6. Click the **Add New Notes** button to add a note regarding the installed base.

Creating a Field Service Request

You may need to create a service request if you encounter unlogged service requests or problems at the customer site.

There are two ways to create a service request from the Service Request Explorer. Use the Customer Information screen or the Customer Product screen. From the Customer Information screen a service request is created without a relation to the installed base. To create a service request for a specific customer product, use the Customer Product screen.

Prerequisites

None

Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need.
3. Click the **Information** button on the toolbar.
4. To create a service request at the customer, level double-click the customers name from the left-hand side of the window. The Customer Information screen opens.
5. To create a service request at the product level double-click the part of the installed base from left-hand side of the window. The Customer Products screen opens.
6. From both the Customer Information or the Customer Products screen, click the **Create Service Request** button. The Service Request Information screen appears.

7. Select the Service Request tab. Choose a Severity, a Service type, and a Service Request Status from the drop-down lists.
8. Select the Problem/Solution tab. Choose Problem and Solution Notes from the drop-down lists.
9. Select the Installed Base tab. Enter the Customer Product number, this field is automatically populated when you are creating a service request from the Customer Product screen.
10. Save the Service Request.
11. If necessary, create a task for the created service request by clicking the pylon button.

Managing Tasks

The following tasks can be performed in the Task screen:

- Managing Task Information
- Updating Task Information
- Updating Task Time Options
- Viewing Task Address Information
- Creating Tasks from the Agenda
- Creating Tasks from the Service Request Explorer
- Creating Personal Tasks

Managing Task Information

Detailed information about the task has been sent along with the schedule. You are able to view, enter, and update this information.

There are two ways to navigate to the Task Information screen: from the Agenda and from the Service Request Explorer.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Click the **Information** button from the toolbar.
3. Double-click on the specific task.
   - In the Agenda from the Task column.
   - In the Service Request Explorer from the Service Request column, the task is indicated with a pylon icon.

   The Task Information screen opens.
4. To view Task information click the Activity tab.
5. To view or add task notes click the **Task Notes** button.

6. To set labor time click the Time Options tab.
7. To view address details and contact at customer click the Address tab.
8. To view or add address notes click the **Address Notes** button.
9. To create a new task click the **Pylon** button.

Updating Task Information

When you are working on a task you need to update the information sent along with the task. This information is used to update and monitor the service schedule.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button from the dashboard. The Agenda or Service Request Explorer window opens.
2. Click the **Information** button on the toolbar.
3. Double-click on the specific task.
   - In the Agenda from the Task column.
   - In the Service Request Explorer from the Service Request column, the task is indicated with a pylon icon.

   The Task Information screen opens.
4. To update Task information click the Activity tab.
5. To change the Task Status make a selection from the drop-down list.
6. To change Task Type make a selection from the drop-down list.
7. To change Priority make a selection from the drop-down list.
8. You can also enter a Description on the performed task.

Updating Task Time Options

The period of time scheduled to perform a task relates to the task type. Similarly a period of time is allotted for travel to a task site. You need to update the time variable with the actual time it took you to travel there and to perform the task. This information is then used to update and monitor the service schedule.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Click the **Information** button from the toolbar.
3. Double-click on the specific task.
   - In the Agenda from the Task column.
   - In the Service Request Explorer from the Service Request column, the task is indicated with a pylon icon.

   The Task Information screen opens.
4. Click the Time Options tab.
5. To change the scheduled time for the task change the Start and/or End time.

   The Set duration time will increase or decrease accordingly.
6. To change the travel time change the Scheduled travel duration Time.

Viewing Task Address Information

It is possible that different tasks for one customer have different locations, therefore detailed task address information is included that details the address and customer contact information.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Click the **Information** button from the toolbar.
3. Double-click on the specific task.
   - In the Agenda from the Task column.

- In the Service Request Explorer from the Service Request column, the task is indicated with a pylon icon.

The Task Information screen opens.

4. Click the Address tab. You are now able to view specific address information.
5. Click the **Address Notes** button to view additional address information. The Notes screen is opened.
6. Click the **Add New Notes** button to add a note regarding the task address like a change of address.

Creating Tasks from the Agenda

Sometimes the tasks assigned to the service request by the dispatcher are not sufficient to complete the service request. You can create a task or multiple tasks for a service request while at work in the field.

There are two ways to create tasks from your agenda: from the service request column and from the task column.

Prerequisites

A service request must exist or been created.

Steps

1. Click the **Agenda** button on the dashboard. The Agenda window appears.
2. Click the **Information** button on the toolbar.
3. To create a task from the task column double-click the specific task. The Task Information screen appears.
4. To create a task from the service request column double-click the specific service request. The Service Request Information screen appears.
5. For both the Service Request Information screen and the Task Information screen click the **Pylon** button. The Task Information screen opens.
6. Enter the task information at the **Activity** tab.

   A task number is automatically generated. Choose a Status, a Task type and a Priority from the corresponding drop down lists. Also enter a task description.
7. Click the **Time Options** tab. Set the start date and time, by default the current date and time are set. Set the end date and time, this will automatically be set in

accordance with the Task type selected. Enter travel time if appropriate. View other scheduled tasks on the time line by selecting a date.

8. View address information for the task you are creating on the **Address** tab.
9. Save the Task.
10. Add another task by clicking the **Pylon** button.
11. Enter the corresponding service request information by clicking the **Service Request** button.

Creating Tasks from the Service Request Explorer

Sometimes the tasks assigned to the service request by the dispatcher are not sufficient to complete the service request. You can create a task or multiple tasks for a service request while at work in the field.

There are two ways to create tasks from your the Service Request Explorer: from the Service Request Information screen and from the Task Information screen.

Prerequisites

A service request must exist.

Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need. A tree with the installed base is shown.
3. Navigate through this tree by clicking the parts you want to see.

   All service requests and related tasks are shown on the right of the window.
4. Click the **Information** button on the toolbar.
5. To create a task at service request level double-click on the service request. The Service Request Information screen opens.
6. To create a task at task level double-click on the task. The Task Information screen opens.
7. For both the Service Request Information screen or the Task Information screen click the **Pylon** button. The Task Information screen opens.

8. In the Activity tab, enter the task information.

   A task number is automatically generated. Choose a Status, a Task type and a Priority from the corresponding drop down lists. Also enter a task description.

9. Select the **Time Options** tab. Set the start date and time, by default the current date and time are set. Set the end date and time, this will automatically be set in accordance with the Task type selected. Enter travel time if appropriate. View other scheduled tasks on the time line by selecting a date.

10. View address information for the task you are creating on the **Address** tab.

11. Save the Task.

12. Add another task by clicking the **Pylon** button.

13. Enter the corresponding service request information by clicking the **Service Request** button.

Creating Personal Tasks

There are situations you need to make an appointment during your working day and you do not want the dispatcher to schedule a service request for you at that particular time. You can create personal non-service request tasks to block out non-available time during your working day. You can make a selection from pre-defined options for the personal task.

Prerequisites

None

Steps

1. Click the **Agenda** button on the dashboard. The Agenda window appears.

2. Click the **Add Personal Task** button from the toolbar. The Personal Task Information screen appears.

3. Select a Status, Def. Work, and Priority from the drop-down lists.

4. Enter the information in the Time Options tab.

5. Save the personal task.

   A non service request related entry appears in your Agenda with the starting time already entered.

Guidelines

Before entering another personal task you will need to close the previous one by entering the Actual End time.

Managing Parts

The following tasks can be performed regarding parts:

- Viewing Parts Information
- Reporting on Parts

Viewing Parts Information

When working on a task in the field, you can view parts information so you can effectively use, order, and replace parts. These can be parts specifically related to the task as well as parts you generally use. You can also view parts to see if you have the parts with you or if you will have to order them.

Prerequisites

None

Steps

1. To manage non task related parts from the dashboard click the **Parts** button. The Parts screen opens.
2. To manage task related parts from the dashboard click the **Agenda** or the **Service Request Explorer** button.
   a. From the toolbar activate the **Parts** button.
   b. Double click the specific task. The Parts window opens.
3. Choose a category from the drop down list.
4. At the bottom of the screen you can view a list of parts based on the option selected from the Transaction type drop-down list. This could be a list for the specific task or a complete list.

Reporting on Parts

Once you have completed a task, you can report on the parts used at the customer site. Use this procedure to report on parts.

Prerequisites

None

Steps

1. To select a non task related part, from the dashboard, click the **Parts** button. The Parts screen opens.
2. To select a task related part from the dashboard, click the **Agenda** or the **Service Request Explorer** button.
    a. From the toolbar activate the **Parts** button.
    b. Double click the specific task. The Parts window opens.
3. Choose a **Category** from the drop down list.
4. To select from all parts check the **Show all items** box. To select from secondary inventory make a selection from the **Sub inventory** and **Locator** drop down list.
5. Search on **Item** or on **Description** by clicking the column header Enter the first number(s) or character(s) of your item.
6. Double-click on the part of your choice.
7. Select an option from the **Parts transaction** and **Transaction type** drop-down list for the selected part.
8. Enter the detailed part information.
9. Click **Save**.

Managing Field Service Reports

The following tasks can be performed using the field service report screen:

- Managing Field Service Report
- Adding or Editing Expenses
- Adding or Editing Labor

Managing Field Service Report

After completing a task or service report, you need to record your labor time, expenses accured, and the parts used at the customer site. Field Service Report allows you to do this for a specific service request or task and print an overview of all labor, parts, and expenses for the service request or task for the customer.

There are two ways to navigate to the Field Service Report screen: from the Agenda and from the Service Request Explorer.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer screen opens.
2. Click the **Debrief** button from the toolbar.
3. Double-click on the specific service request or task to report on. The Field Service Report screen opens.
4. If your system is configured with more then one field service report, type or select your desired report in the list box located in the upper left part of the screen.
5. To edit or add a part click on the **Parts** button. For more information see Reporting on Parts.
6. To edit or add a labor line click on Labor. For more information, see Adding or editing Labor.
7. To edit or add an expense click on Expense. For more information, see Adding or Editing Expenses.
8. To print the Field Service Report click the **Print** button from the toolbar.

Adding or Editing Expenses

Use this procedure to report on expenses.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Select the **Field Service Report** button from the toolbar.
3. Double-click on the specific service request or task to report on. The Choose Field Service Report screen opens.
4. Make a selection from the drop down list. The Field Service Report screen of your choice is opened.
5. To edit an Expense select an expense.
6. To add a Labor click **Add**.
7. Choose an Expense type from the drop down list.
8. Choose an Expense item from the drop down list.
9. Enter the amount of money paid at Price.
10. Choose a currency from the drop down list for the amount entered.
11. Enter a Quantity for the selected expense.
12. Choose an UOM from the drop down list for the quantity entered.
13. Click **Save** to save the expense report.

Adding or Editing Labor

Use this procedure to report on Labor from the Field Service Report screen.

Reporting on labor can also be done from the Agenda. For more information, see Agenda.

Prerequisites

None

Steps

1. Click the **Agenda** or the **Service Request Explorer** button on the dashboard. The Agenda or Service Request Explorer window opens.
2. Select the **Field Service Report** button from the toolbar.
3. Double-click on the specific service request or task to report on. The Choose Field Service Report screen opens.
4. Make a selection from the drop down list. The Field Service Report screen of your choice is opened.
5. Select a labor.
6. Click **Add** to add a labor.
7. Enter the start and end time.
8. Select a labor type from the drop down list.
9. Select a labor item from the drop down list.
10. Enter start and end Mileage.
11. Click **Save**.

Managing Service Request Explorer

The following tasks can be performed with the service request explorer.

- Working with the Service Request Explorer
- Search for Customer Information
- Search for Customer Products
- Searching for Service Requests

Working with the Service Request Explorer

Within the service request explorer you are able to search and present information in different ways. You can view customer and product information. You can also create, view, and update service requests and tasks.

Prerequisites

None

Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop down list under Customers on the left or Service Requests on the right of the window to perform a search query. The query screen opens.

   It is possible to create customized search query's for you, ask your Administrator.
3. In the query screen enter specific data to search for or enter just the first characters and an asterisk(*) to broaden your search.
4. Click **OK** to start the search query. The customer and product information is presented in a tree on the left and the service request and task information on the right side of the window.
5. Navigate through this tree by clicking on the parts you want to see, the tree will unfold.

   At all levels you are able to view the service requests and related tasks on the right-hand side of the window.

6. By clicking the telephone icon in the Customers list you can quickly search again using the same properties.

Search for Customer Information

From within the Service Request Explorer you can search for and view detailed customer information.

Prerequisites

None

Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list under Customers on the left of the window to view information.

   A list of all customers or one specific customer and a tree with the installed base is shown.
3. Double-click on the customers name. The Customer Information screen is opened. All customer information is displayed.

Search for Customer Products

From within the Service Request Explorer, you can search for and view detailed product information.

Prerequisites

None

Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list under Customers on the left of the window to view information.

   A list of all customers or one specific customer and a tree with the installed base is shown.

3. Double-click on a part of the installed base. The Customer Products screen is opened.
4. Select the Object tab to view general information such as install date and item description on the specific product.
5. Select the Address tab to view the detailed location of the specific product.
6. Select the Notes tab to view detailed information such as history and technical information on the specific product.

Searching for Service Requests

You can search for service requests based on service request properties or based on customer or product configuration.

Prerequisites

None

Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list under Customers on the left or Service Requests on the right of the window.

   A tree with the service requests and related tasks is shown on the right of the window.
3. Double-click the service request of your choice.

Generating Views

By generating views, you can query your local data and present or print it in a spreadsheet format.

Prerequisites

The views button and option has to be activated. Ask your administrator for more information.

Steps

1. Click the **Views** button on the dashboard. The Views screen opens.
2. Select a report from the list box in the upper left corner.

   Depending on the selected view, you need to enter organization ID in order to generate the view you desire. The view appears on your screen.
3. View the query on your screen or click the **Print** button to print the view.

Managing Counters

Use these procedures to manage counters.

- Adding and Resetting a Counter Reading
- Adding a Miscellaneous Counter Reading
- Editing and Resetting Counter Readings

Adding and Resetting a Counter Reading

A set of counters with readings on the product you are servicing are sent along with the schedule. Use this procedure to add a new reading or reset a counter.

Prerequisites

Counter information has to be send along with the schedule.

Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need.
3. Double-click on the product you want to add a reading for. The Customer Products screen opens.
4. Click the **Counters** button. The Counter Form screen opens.
5. Select a Counter on the left of the window.
6. Click **New**.
7. Enter a value at Counter Reading.
8. Check the **Reset Flag** to reset the counter
9. Enter the last reading on the counter before resetting it at Pre Reset Last Reading.
10. Enter the first reading after resetting the counter at Post Reset First Reading.
11. Enter a description at Reset Reason.
12. Click **Save** to save the reading.

Adding a Miscellaneous Counter Reading

A set of counters with readings on the product you are servicing are sent along with the schedule. Use this procedure to add a miscellaneous reading for a counter.

Prerequisites

Counter information has to be send along with the schedule.

Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.
2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need.
3. Double-click on the product you want to add a reading for. The Customer Products screen opens.
4. Click the **Counters** button. The Counter Form screen opens.
5. Select a Counter on the left of the window.
6. Click **New**.
7. Enter a value at Counter Reading.
8. Choose a Miscellaneous Reading Type from the drop down list.
9. Enter a value at Misc. Reading.
10. Click **Save** to save the reading.

Editing and Resetting Counter Readings

A set of counters with readings on the product you are servicing are sent along with the schedule. Use this procedure to edit an existing reading or reset an existing reading for a counter.

Prerequisites

Counter information has to be send along with the schedule.

Steps

1. Click the **Service Request Explorer** button on the dashboard. The Service Request Explorer window opens.

2. Make a selection from the drop-down list on the left of the window under Customers to view the information you need.
3. Double-click on the product of your choice. The Customer Products screen opens.
4. Click the **Counters** button. The Counter Form opens.
5. Select a Counter on the left of the window.
6. Select the reading you want to update or reset from Reading.
7. Click the **Edit** button.
8. Edit the Counter Reading or Miscellaneous Reading.
9. Check the **Reset Flag** to reset the counter
10. Enter the last reading on the counter before resetting it at Pre Reset Last Reading.
11. Enter the first reading after resetting the counter at Post Reset First Reading.
12. Enter a description at Reset Reason.
13. Click **Save** to save changes.

Administering Oracle Field Service/Laptop

This topic group provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities.

Topics covered in this topic group are:

- Enabling Communication

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 defined as well.

Prerequisites

An user account on the CRM Gateway for Mobile Devices.

Steps

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.