

Oracle® Field Service/Palm™ Devices

Implementation Guide

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1 Implementing Field Service/Palm™ Devices

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

Topics covered are:

- [Implementation Overview of Field Service/Palm™ Devices](#)
 - [Implementing Flowchart](#)
 - [Implementing Checklist](#)
- [Implementing Steps](#)
- [Setting up Field Service/Laptop and Field Service/Palm™ Devices](#)
 - [Configuration Parameters](#)
 - [Resources Subinventories Assignment](#)
 - [Profile Options](#)

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1.1 Implementation Overview of Field Service/Palm™ Devices

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

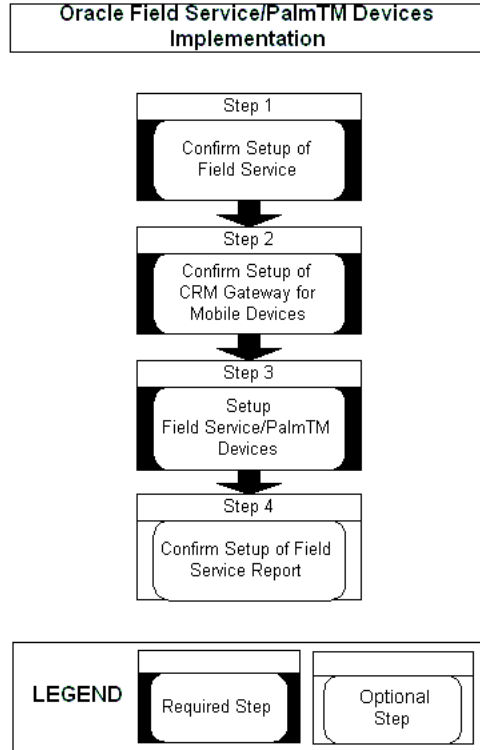
- Field Service
- CRM Gateway for Mobile Devices

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/Palm™ Devices.

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 Field Service
2.	Yes	Confirm Setup CRM Gateway for Mobile Devices
3.	Yes	Setup Field Service/Palm™ Devices on the CRM Enterprise Database
4.	Yes	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 *Implementing Field Service*.

1.2.2 Step 2: Confirm Setup 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/Palm™ Devices on the CRM Enterprise Database

Make sure you installed Field Service/Palm™ Devices as described in *Field Service/Palm™ Devices Installation Guide*.

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

- [Configuration Parameters](#)
- [Resources Subinventories Assignment](#)
- [Profile Options](#)

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

1.2.4 Step 4: 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/Palm™ Devices, 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	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	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 subinventories.
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 setup the profile options:

- [Profile Options](#)

1.3.1 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:
 - [Agenda](#)
 - [Parts](#)
 - [Mail](#)

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.
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.

Step	Option	Description
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

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.

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.

1.3.2 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.

Step	Field	Value
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**.

1.3.3 Profile Options for Field Service/Palm™ Devices

Make sure to set the following profile options for Field Service/Palm™ Devices.

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_M	<p>Profile option for the Field Service/Palm™ Devices application to handle updates to the CRM database from the mobile devices. Options are:</p> <ul style="list-style-type: none"> ■ Client wins. No timestamp checking is done, mobile record always overwrite record in CRM database. ■ Timestamp. When the last update date of the CRM record is greater then the last sync date (date when the mobile device originally got the record), the mobile record won't be applied to CRM. When the last update date of the CRM record is smaller or equal to the last sync date the mobile record will be applied to CRM.
CSF: History_M	<p>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.</p>
CSF: InstalledBaseProduct_M	<p>Define what information from the Installed Base you want to send to Field Service/Palm™ Devices:</p> <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.
CSF: Return Reason	<p>Used to default a Return Reason on the Field Service Report window for a material line created. Select which one should be defaulted from the list of values. It's a mandatory field for Order Management. Especially use this profile option when working with one of the mobile applications.</p>
CSF: Default Status Responsibility	<p>Choose a default responsibility to define which state transition rule is used. This profile option is set for the users from the mobile applications.</p>

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:

Profile Option	Description
ASG Field Service/Laptop Organization ID	All items from the inventory for the organization selected are replicated to Field Service/Laptop.

1.4 Documentation Accessibility

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