Oracle® Field Service/Wireless

Concepts and Procedures

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1 Understanding Field Service/Wireless

Field Service/Wireless is a connected mobile field service solution. This means that the application has a continuous connection to the CRM enterprise applications. The field service representative connects to this application by choosing a URL on their mobile device's web browser. Once connected to the database, users interact with the browser based application on the mobile device.

Field Service/Wireless delivers timely information in a connected environment only. The field service engineers can accept the transactions and inquiries at the customer site using the WAP-enabled devices.

Field Service/Wireless integrates with Oracle's 9i Application Server Wireless Edition formerly known as Portal-to-Go. Using this platform, it enables wireless users to access existing database and internet applications for WAP handsets, PDAs, and standard phones.

1.1 Features

The Oracle Field Service/Wireless application includes the following features:

- Ability to search on the following:
  - Service request
  - Task number
  - Parts, based on part number and part description, subinventory, and quantity
  - Date
- Ability to view and update tasks, including:

- Check the expected start time
- Update the status
- Debrief to record information about the task
- Capture Counter reading
- Report on labor and expenses
- Ability to manage customer information, including:
  - View the address
  - View the contact information
  - Send e-mail to the contact person
  - Call the contact person
- Ability to view service request information including:
  - Customer name
  - Serial number
  - Product number
  - Contract details
- Ability to view route directions
- Ability to view contract details including:
  - Contract number
  - Date fixed
  - Other contractual elements such as cost of labor and parts covered
- Ability to transfer parts and manage spare parts

1.2 Components

Field Service/Wireless enables read and write functions to the enterprise database through wireless connection between mobile device, WAP Gateway and the 9iAS wireless edition.

The following components are involved:

- Enterprise Database: This is the enterprise data that field service engineer will access through mobile device.
- Applications Web Server: This is the http server used for enterprise applications.

- Oracle 9iAS Wireless Edition: This server is used to transform XML to any markup language (WML, HDML, VoxML).
- WAP Gateway: This translates the data from the internet protocol (HTTP) to the wireless protocol (WAP) and vice versa. Note that this is not the same as Oracle CRM Gateway for Mobile Devices.
- WAP enabled mobile device: This device is capable of displaying Web pages in WML browser.

1.3 About the business process

The Oracle Field Service engineer is equipped with a Field Service/Wireless device, in most cases a WAP-enabled mobile phone. The WAP device does not replace the use of the laptop or palm devices. It enables the Oracle Field Service engineer to quickly retrieve task and task-related information.

Field Service/Wireless is used together with the other wireless products and is not intended to replace these products. It will make the retrieval of task related information easier, because most field engineer representatives carry phones with them. A connection with the wireless network is necessary for the application to operate.

Field Service/Wireless supports the following business process flow.

1. The call center agent creates a request and an Oracle Field Service task.
2. The planner schedules a task and dispatches it to the most suitable Oracle Field Service engineer.

   From this moment the Oracle Field Service engineer can use the Field Service/Wireless to retrieve task and task related information.
3. The Oracle Field Service engineer logs on to Oracle Field Service/Wireless.
4. The Oracle Field Service engineer retrieves the Agenda of the current working day.

   If the current day is not applicable, the Oracle Field Service engineer can choose another date of his interest. The choice consists of the following items: tomorrow, yesterday, this week or enter date. After the Oracle Field Service engineer selects one of these items, this date becomes the current day.
5. The Oracle Field Service engineer can now do the following:
   - View customer information

     Oracle Field Service engineers can inquire on the customer information concerning the selected task. They can also select telephone numbers and use them to call the customer.

- View and update task information

  Oracle Field Service engineers can inquire on the task information concerning the selected task. They can change the resolution and the status of the selected task. They can also report expenses and labor, as well as capture counter readings.

- View request information

  Oracle Field Service engineers can inquire on the request information concerning the selected task.

- Submit the resolution of the task

  Oracle Field Service engineers can change the resolution of the selected task. The resolution list is extracted from the back office application. The user will be asked to close the task. If so, the status of the task will be set to Closed.

- Submit the change of task status

  Oracle Field Service engineers can change the status of the selected task. The task list is extracted from the back office application. When the status of the task is set to Closed, the screen returns to the agenda.

2 Using Field Service/Wireless

This topic group provides process-oriented, task-based procedures for using Field Service/Wireless. The topics that are covered in this section are:

Getting started

- Starting and logging in

Working with Tasks

- Viewing Today's Tasks
- Retrieving Task Information
- Searching for a Task
- Changing the Status of a Task
- Choosing a date other than today

Searching for Parts

- Starting a New Search for a Part
- Repeating a Search for a Part

Viewing Service Requests and Customer Information

- Searching for Service Requests
- Viewing Customer Information
- Viewing Service Request Details
- Viewing Contract Details

Capturing Counter Readings

- Viewing and Entering Counters

Debriefing Information When a Task is Finished

- Viewing or Entering the Resolution for a Task
- Viewing Expenses
- Adding New Expense Information
- Viewing Labor Information
- Adding New Labor Information

2.1 Starting and logging in

You start by selecting the Field Service/Wireless by Uniform Resource Locator (URL) on the mobile telephone. A URL is an address on the Internet. The URL can be different for the individual devices.

To log in to the Field Service/Wireless, enter your login ID and password for this application.

After you log in, the first screen you see is the **Menu** screen. From this screen you can:

- Go to the tasks for today
- Go to a date other than today
- Search for parts
- Search for tasks
- Search for service requests

2.2 Viewing Today's Tasks

Use this procedure when you are looking at the tasks for another date, and want to return to today's tasks.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.

The **Tasks Summary** screen you your schedule for today. You can scroll up and down to see all your tasks and their starting times. You can also change the date to see the tasks for another day.

2.3 Retrieving Task Information

Use this procedure to view your task information for today, and to see a description of the task problem.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.

2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Highlight a task and choose **OK**. The **Task Details** screen appears. Completed tasks are shown at the bottom of the list with an asterisk symbol in parentheses: (*).

   A list of types of information about the task is shown, including:

   - Customer name
   - Status of the task
   - Service request number
   - Debrief number
   - Expected start time
   - Counter reading, if the product is associated with the installed base

   You can choose any of the items on the list to see more information. These items and how to use them are described in the sections that follow.
4. To read a description of the problem, select **Debrief** and choose **View**.
5. Select **Problem Code** and choose **OK**.
6. Choose **Done** to return to the screen shown in step 3.
7. Choose **Done** again to return to the **Task Details** screen.
8. Choose **Tasks** to return to the **Tasks Summary** screen.
9. Choose **Menu** to return to the **Menu** screen.

2.4 Searching for a Task

Use this procedure to search for a task when you know its number.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Task Search** and choose **OK**.
3. Enter the task number and choose **OK**. The **Task Details** screen appears showing the task you were looking for.
4. Choose **Tasks** to return to the **Tasks Summary** screen.

5. Choose **Menu** to return to the **Menu** screen.

2.5 Changing the Status of a Task

Use this procedure to change the status for a task.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task for which you want to change the status, and choose **OK**. The **Task Details** screen appears.
4. Select **Status** and choose **View**.
5. Choose the status, for example, Completed or Cancelled.
6. Choose **OK** to choose the status you have selected.
7. Choose **Close** to return to the **Task Details** screen.
8. Choose **Tasks** to return to the **Tasks Summary** screen.
9. Choose **Menu** to return to the **Menu** screen.

2.6 Choosing a date other than today

Use this procedure to choose a date different than today.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. To see the tasks for tomorrow, select **Next Day.**
4. To see your tasks from yesterday, select **Previous Day**.

5. To see the tasks for another date, select **Menu**. The **Menu** screen appears.
6. Select **Date Search**.
7. Enter the date you want to see, and choose **OK** to go to that date.
8. Choose **Menu** to return to the **Menu** screen.

2.7 Starting a New Search for a Part

Use this procedure to start a new search for a part.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Parts Search** and choose **OK**. The **Part Search** screen appears.
3. Select **New Search** and choose **OK**. You can base your search on one of the following criteria:
   - Select **Part #** and choose **Edit** to search on the part based on its part number or a description of the part.
   - Select **Subinventory** and choose **Edit** to search on the part based on its subinventory. You can specify the subinventory to search on as follows:

     Choose from a list of all subinventories

     Enter a specific subinventory

     Choose the default subinventory that is shown

     Choose from a list of recent subinventories
   - Select **Quantity** and choose **Edit** to search on the part based on the number of parts.
4. When you have completed the search criteria, choose **OK** to return to the **Part Search** screen.
5. Select **Find** to initiate the search.
6. If too many search results are found, you are prompted to refine the search by entering more specific search criteria. You can refine your search based on one of the following:
   - Part number

- Subinventory
- Quantity

7. Choose **OK** to return to the **Part Search** screen.
8. Select **Save Search** and choose **OK** to save this search so that you can repeat it later. You can save up to 7 searches.
9. Choose **Tasks** to return to the **Tasks Summary** screen.
10. Choose **Menu** to return to the **Menu** screen.

2.8 Repeating a Search for a Part

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Parts Search** and choose **OK**. The **Part Search** screen appears.
3. Select **Saved Searches** and choose **OK**. A list appears of the earlier searches you have made and saved.
4. Select **Last Search** and choose **OK** to redo the last search you made.
5. Choose **Cancl** to return to the **Tasks Summary** screen.
6. Choose **Menu** to return to the **Menu** screen.

2.9 Searching for Service Requests

Use this procedure to search for a service request when you know its number.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **SR Search** and choose **OK**.

3. Enter the number of the service request you want to view and choose **OK**. Information about the service request appears. See Viewing Service Request Details for more information.
4. Choose **Menu** to return to the **Menu** screen.

2.10 Viewing Customer Information

Use this procedure to view information about the customer for a task, and to send an e-mail or a fax to the customer.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task whose customer you want to know, and choose **OK**. The **Task Details** screen appears.
4. Select **Customer** and choose **View**. The address and contact information for the customer are shown.
5. Choose **Call** if you want to initiate a telephone call.
6. Choose **Send** to initiate an e-mail. An empty screen appears where you can write the text of the e-mail.
7. When you have finished writing, choose **OK** to send the e-mail. A confirmation appears to show that the e-mail was sent.
8. Choose **Close** to return to the **Task Details** screen.
9. Choose **Tasks** to return to the **Tasks Summary** screen.
10. Choose **Menu** to return to the **Menu** screen.

2.11 Viewing Service Request Details

Use this procedure to view more information about service requests.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task for which you want to see the service request, and choose **OK**. The **Task Details** screen appears.
4. Select **SR#** and choose **View**. The Service Request details appear with the following information:
   - Customer name
   - Serial number
   - Product number
   - Contract Details
5. To see more information about any of the items shown, select the item and choose **OK**.
6. Choose **Done** to return to the screen shown in step 3.
7. Choose **Tasks** to return to the **Tasks Summary** screen.
8. Choose **Menu** to return to the **Menu** screen.

2.12 Viewing Contract Details

Use this procedure to view the details for a contract. Note that contract details are shown only for service requests that have contracts associated with them.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task for which you want to view the contract details, and choose **OK**. The **Task Details** screen appears.
4. Select **SR#** and choose **View**.

5. Select **Contract Details** and choose **OK**. If there is a valid contract for this service request, the following information is shown:
   - Contract number
   - Date the work was done, and by whom
   - Cost of Labor
   - Cost of Labor
   - Cost of Parts
6. To see more information about any of the lines on this screen, select it and choose **View**.
7. Choose **Done** to return to the screen shown in step 3.
8. Choose **Close** to return to the **Task Details** screen.
9. Choose **Tasks** to return to the **Tasks Summary** screen.
10. Choose **Menu** to return to the **Menu** screen.

2.13 Viewing and Entering Counters

Use this procedure to view counter readings, and to change or enter new counter readings. Note that counter readings are shown only if you pick a product from the installed base, and that product has counter readings associated with it.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task for which you want to see counter information, and choose **OK**. The **Task Details** screen appears.
4. Select **Counter Reading** and choose **View**. If there is only one counter, you see information about that counter.
5. If there are multiple counters, you see a list of counters for this product. Select the counter name that you want to view, and choose **View**.
6. Select **New Reading** and choose **Edit** to enter a new counter reading.
7. The **Current Reading** field shows the current reading for the counter.

8. Select **Reset Counter** and choose **Edit** to reset the counter to another number. You will be prompted to enter a reason for resetting the counter.
9. To edit one of the other counter properties, select it and choose **Edit**. These counter properties are set up by your system administrator.
10. Choose **Done** to return to the **Task Details** screen.
11. Choose **Tasks** to return to the **Tasks Summary** screen.
12. Choose **Menu** to return to the **Menu** screen.

2.14 Viewing or Entering the Resolution for a Task

Use this procedure to see the resolution of a task. You can change an existing description or you can enter the a new resolution description after you've finished the task.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task for which you want to view the resolution, and choose **OK**. The **Task Details** screen appears.
4. Select **Debrief** and choose **View**.
5. Select **Resolution Code** and choose **Edit**. If a resolution already exists, you will see it right away. If there is no resolution yet, you will see an empty resolution code.
6. To make changes to an existing resolution, choose **Edit**. When you have finished your changes, choose **OK**.
7. If the resolution code is empty, enter a description of the resolution and choose **OK**.
8. Choose **Done** to return to the screen shown in step 4.
9. Choose **Done** again to return to the **Task Details** screen.
10. Choose **Tasks** to return to the **Tasks Summary** screen.
11. Choose **Menu** to return to the **Menu** screen.

2.15 Viewing Expenses

Use this procedure to view your expenses and make changes to existing expenses. You can make changes to expenses only before they have been charged.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task for which you want to view expenses, and choose **OK**. The **Task Details** screen appears.
4. Select **Debrief** and choose **View**.
5. Select **Expense Line** and choose **View**. You can see how many expense lines there are.
6. If there is only one expense, you see it right away. If there are multiple expenses, choose the one you want to see and choose **OK**. The expense details appear.
7. If you want to change any of the lines, select it and choose **Edit**.
8. When you have finished making your changes, choose **Done** to return to the screen shown in step 3.
9. Choose **Done** again to return to the **Task Details** screen.
10. Choose **Tasks** to return to the **Tasks Summary** screen.
11. Choose **Menu** to return to the **Menu** screen.

2.16 Adding New Expense Information

Use this procedure to add a new expense.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.

2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task for which you want to see information, and choose **OK**. The **Task Details** screen appears.
4. Select **Debrief** and choose **View**.
5. Select **New Expense Line** and choose **Edit**.
6. Enter the type of new expense and choose **OK**.
7. Enter the item for the new expense and choose **OK**.
8. If you want to enter a currency other than the one shown by default, enter the currency for the new expense and choose **OK**.
9. Enter the amount of the new expense and choose **OK**. You will see a summary of the Expense details as you have entered them.
10. If you don't want to change the expense line, set the change flag to **N**.
11. Choose **Done** to return to the screen shown in step 4.
12. Choose **Done** again to return to the **Task Details** screen.
13. Choose **Tasks** to return to the **Tasks Summary** screen.
14. Choose **Menu** to return to the **Menu** screen.

2.17 Viewing Labor Information

Use this procedure to view and change existing information about labor. You can make changes to labor information only before it has been charged.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task for which you want to see information, and choose **OK**. The **Task Details** screen appears.
4. Select **Debrief** and choose **View**.
5. Select **Labor Line** and choose **View**. You can see how many labor lines there are.

6. If there is only one entry for labor, you see it right away. If there are multiple labor lines, choose the one you want to see and choose **OK**. The labor details appear.
7. If you want to change any of the lines, select it and choose **OK**.
8. When you have finished making your changes, choose **Done** to return to the screen shown in step 4.
9. Choose **Done** again to return to the **Task Details** screen.
10. Choose **Tasks** to return to the **Tasks Summary** screen.
11. Choose **Menu** to return to the **Menu** screen.

2.18 Adding New Labor Information

Use this procedure to add a new labor line.

Prerequisites

None

Steps

1. Navigate to the **Menu** screen.
2. Select **Today's Tasks** and choose **OK**. The **Tasks Summary** screen for today appears.
3. Select the task for which you want to see information, and choose **OK**. The **Task Details** screen appears.
4. Select **Debrief** and choose **View**.
5. Select **New Labor Line** and choose **Edit**.
6. Enter the type of labor and choose **OK**.
7. Enter the item for this labor line and choose **OK**. You will see a summary of the labor details as you have entered them.
8. Choose **Done** to return to the screen shown in step 4.
9. Choose **Done** again to return to the **Task Details** screen.
10. Choose **Tasks** to return to the **Tasks Summary** screen.

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