Oracle® Field Service

Concepts and Procedures

Release 11*i*

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

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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

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Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Field Service Concepts and Procedures.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Field Service

  If you have never used Oracle Field Service, Oracle suggests you attend one or more of the Oracle Field Service training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Field Service.

- Chapter 1 provides an overview of the applications features, business processes, applications process, and use.
- Chapter 2 provides task based topics on how to use the Field Service Dispatch Center.

- Chapter 3 provides task based topics on how to use the Field Service Report.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Field Service.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Field Service shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Field Service.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Field Service (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Field Service Implementation Guide

This guide explains how to implement the Oracle Field Service application and set it up effectively across the E-Business suite. It includes information on setting user profiles, as well as profile options and concurrent processes.

Oracle CRM Foundation Concepts and Procedures

Oracle Field Service uses a lot of the modules from CRM Foundation. Refer to this guide for details on the usage of each module.

Oracle Scheduler Concepts and Procedures

When Oracle Scheduler is installed the usage is tightly integrated with the Field Service application. This guide explains the Scheduler processes and how it is integrated with Field Service.

Oracle Spares Management Concepts and Procedures

Use this guide to learn more about the Spares Management processes and usage. Especially when working with Scheduler as well, Field Service, Scheduler, and Spares Management are tightly integrated.

Oracle Field Service/Laptop Concepts and Procedures

This guide will help you to navigate the mobile client, the laptop device, and explains how to use the Field Service/Laptop application. Field Service information is send to the laptop device to be handled by the field service representative.

Oracle Field Service/Palm™ Devices Concepts and Procedures

This guide will help you to navigate the mobile client, the palm device, and explains how to use the Field Service/Palm™ Devices application. Field Service information is send to the palm device to be handled by the field service representative.

Oracle Field Service/Wireless Concepts and Procedures

This guide will help you to navigate the mobile client, the wireless device, and explains how to use the Field Service/Wireless application. Field Service information is send to the wireless device to be handled by the field service representative.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications

products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Field Service. This manual details additional steps and setup considerations for implementing Oracle Field Service with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Field Service with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Field Service.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Field Service implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Field Service and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization’s structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Field Service working for you. This team includes your Technical Representative, Account Manager, and Oracle’s large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Understanding Field Service

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

Topics covered are:

- Introduction to the Field Service Suite
- The Field Service Process
- Overview of Field Service
- How Field Service Relates to the E-Business Suite
- The Scheduling and Task Assignment Process
- What is the Field Service Dispatch Center?
- What is Field Service Report?

1.1 Introduction to the Field Service Suite

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

The Field Service suite offers a range of products to meet your organization's business needs. The following table lists all the products in the suite.

Suite Product	Description
Customer Care	Not really a product of the Field Service suite but the Service Request form is delivered along with the Field Service application to take the customers call for service and create a service request.
CRM Foundation	The products in CRM Foundation are essential to use Field Service. They are used to create tasks, territories, define resources, and help in the assignment of tasks to resources. CRM Foundation comes with Field Service.
Field Service	The Field Service application assists in assigning tasks to service representatives, creating and dispatching daily schedules, monitoring progress, and reporting on material, expense, and labor transactions.
Scheduler	Scheduler enables optimization of scheduling capabilities of tasks to qualified resources. It takes into account driving time, distance, part availability and creates part reservations.
Spares Management	Spares Management is used to provide additional logistics and planning features to manage a service parts inventory in a multi-location environment.
CRM Gateway for Mobile Devices	The CRM Gateway for Mobile Devices consists of a mobile client and a central application. It provides data transport between the Oracle CRM enterprise database and the Oracle mobile client database.
Field Service/Laptop	This is a remote application typically installed at a service representative's laptop to receive his daily schedule and report on progress, material, expense, and labor.
Field Service/Palm™ Devices	This is a remote application for a handheld device so a service representative can receive his daily schedule and report on progress, material, expense, and labor.

Suite Product	Description
Field Service/Wireless	This is a remote application for a WAP enabled device so a service representative can receive his daily schedule and report on progress, expense, and labor.

1.2 The Field Service Process

The entire field service process includes six major areas. The process is initiated by the creation of a field service request. To perform service out in the field, tasks are assigned to the service request. These tasks are assigned to service representatives to be carried out in the field. At the end the service representative reports on the performed tasks and an invoice is created. This process is driven by service request status and task status changes.

Reviewed in more detail is:

- The Field Service Business Process
- How this Process Relates to the E-Business Suite

The Field Service Business Process

The steps in the field service process are described in the table below.

Step	Description
1. Field Service Request Intake & Validation	There are several ways to report a request for service. The customer can create the request by using the Web, using Computer Telephone Integration (CTI), using e-mail, or dialing into a call center where an agent takes the call. A field service request can also be created by a service representative, through a project, or by a sales order (installation of a product). When the request is received, the customer, product, and contract are checked in the validation step.
2. Field Service Request Screening & Qualification	After creation the service request is screened to avoid a field visit. The service request is analyzed by a support agent who searches the knowledge base for a solution. As an outcome of this process, the request may be closed, a part is shipped to the customer, or the customer ships the part for in-house repair. When as an outcome a field visit is required a task is created based on the problem description and action needed to resolve the problem. Also a definition for the parts necessary to resolve the task is given. The creation of a task for installation or maintenance of customer product can be created automatically from a service contract or sales order.

Step		Description
3.	Field Service Request Planning & Dispatch	The tasks must be scheduled, assigned, and dispatched to the service representatives. The scheduling of the tasks is done based on various constraints such as skills, location, availability, and required parts. When the tasks assignment is done the task or schedule is dispatched to the service representatives. The service representative receives notification and progress on the task is monitored.
4.	Field Service Request Delivery & Reporting	Upon receipt of an assigned task or schedule, the service representatives delivers the service at the customers site. He reports on progress, materials used, materials recovered, expenses made, and time spent. Additionally he can record a counter reading or provide information about how the problem has been resolved. It might even be necessary to create new tasks or service requests when it appears he can't help the customer right then and there. He can recover the product or part of the product for repair and assign it an RMA (Return Material Authorization) to track the customer product. All the reported information is used for billing the customer but reporting on materials used also results in auto replenishment of the service representatives car stock.
5.	Field Service Request Monitoring	During the entire process things could happen that endanger the execution of a field visit or task assignment. Escalations are raised to act accordingly.
6.	Field Service Request Completion & Billing	When the service representative is completely done with the task he gives it a complete status and moves on to the next task. The information is checked by an agent in the office for any service contract coverage and an invoice is created. Inventories, subinventories, and installed base are updated.

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

How this Process Relates to the E-Business Applications Suite

Now how does this process relate to the E-Business Applications suite of products. The following table lists the possibilities for a field service solution based upon the process above.

Step		Application
1.	Field Service Request Intake & Validation	Oracle iSupport A service request can be initiated by the customer or an agent through the web. Oracle Sales A service request and task can be initiated from a sales order. Customer Care A service request can be initiated by an agent from the Contact Center. Oracle Service Contracts A service request and task for maintenance can be initiated by a contract when setup correctly. For each service request: ■ Take down customer information. ■ Use Product Coverage to validate any contract coverage for service.
2.	Field Service Request Screening & Qualification	Customer Care Service Request form ■ Analyze the problem. ■ When a field visit is required, take down the installed at address to locate the product at the customers site. ■ Create tasks to perform the visit. Define the field service task type, define when a service representative is supposed to arrive at the customers site at Planned Start and End date. Define how much effort the task takes for completion, for example, 1 hour, half a day, or 1 day.

Step		Application
3.	Field Service Request Planning & Dispatch	**Field Service** Use the Dispatch Center to schedule and dispatch tasks. Scheduler Call upon the Scheduling Advice window from the dispatch center to optimize your scheduling capabilities. Spares Management Access the Spares Management application to order spare parts. When Scheduler is installed this is done automatically at task assignment.
4.	Field Service Request Delivery & Reporting	Field Service/Laptop The schedule is received by the service representative on his mobile device. He records counter readings and reports on material used, time spent, and expenses made. Field Service/Palm™ Devices The schedule is received by the service representative on his mobile device. He records counter readings and reports on material used, time spent, and expenses made Field Service/Wireless The schedule is received by the service representative on his mobile device. He reports on time spent, and expenses made Depot Repair To create an RMA for a recovered product **Field Service** All information is received back from the mobile devices and consolidated on the Field Service Report. This information is then updated to Inventory, Installed Base, and Charges.
5.	Field Service Request Completion & Billing	Customer Care From Charges updates are made to create an invoice for billable expenses.

1.3 Overview of Field Service

Field Service is an essential part of the Field Service Application Suite. At the core of Field Service is the Dispatch Center which allows the field service dispatcher to plan, dispatch, and monitor all field service activities, ultimately ensuring that the right person is in the right place at the right time with the right parts. The Field Service Report enables you to report all activities performed out in the field.

Review the following to learn more about the Field Service application:

- Field Service Dispatch Center features
- Field Service Report features

Field Service Dispatch Center Features

- Shows information for a selected task such as related service request, escalations, parts transactions, installed base related information, resources assigned for a task, and customer address information.
- Scheduling or task assignment, either automatically or manually, to one or more service representatives. The automatic process of scheduling tasks can be run as a background process.

  Task assignment is assisted by the use of the Assignment Manager. For more information, see *CRM Foundation Concepts and Procedures*.

  When Oracle Scheduler is installed, you can optimize your scheduling capabilities. Driving time and distance for the service representative is provided, and parts reservations are made. For more information, see *Oracle Scheduler Concepts and Procedures*.
- Managing parts information. Locating, ordering, and monitoring parts for specific tasks.

  When Oracle Scheduler is installed locating parts and creating reservations is done automatically.
- Commitment of tasks and daily schedules to service representatives, either automatically or manually. When parts reservation are created an order for the parts is initiated by this process.

  The tasks or daily schedules are send to the service representative's mobile application with information about the task, related service request, problem and resolution, customer address information, installed base information when applicable, and counters.

- Monitoring schedules, activities, and progress, of service representatives.

  Use different grids to visualize the planning such as a daily view, view over a period of time (user definable), or a geographical representation.

  Escalation notifications give you the ability to react to non-conforming tasks (tasks that for some reason become non-conforming, for example parts aren't available anymore, contract response times can't be met).

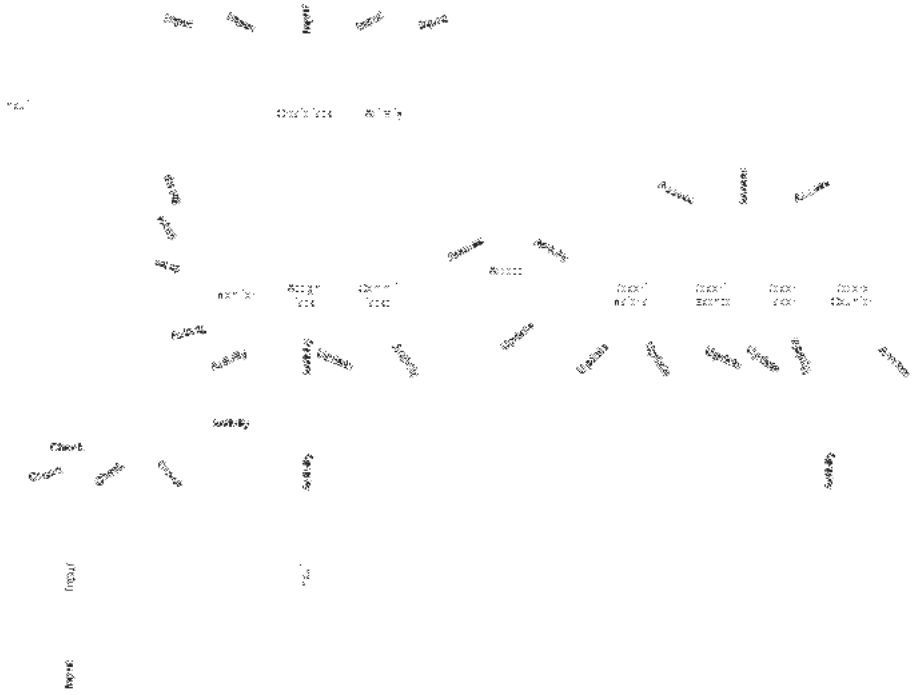
- Making a selection of tasks based on characteristics such as ready to be planned, planned for today, or escalated.
- View service history for a customer or a product.

Field Service Report Features

- Reporting on parts, expenses, and labor for a task. Ultimately resulting in updates to Inventory, Installed Base, and Charges.
- Reporting on Counters. From Field Service Report you can easily access the Capture Counter Reading functionality from Oracle Service to capture counter readings.
- Direct access to specific Spares Management functionality such as View Move Order, Create Move Order, and View Onhand Quantity.
- Access Notes, Calendar, or Interaction History directly.

1.4 How Field Service Relates to the E-Business Suite

Field Service is integrated with many other Oracle Applications. The following figure visualizes this integration. All applications involved and their relation are explained in more detail in the sections following the figure.



Service Request

A Service Request is created, the following applications have a relation with Service Request:

- Knowledge Base, provides input for resolution of the problem.
- Contracts, this could be either Contracts Core or Service Contracts. Input for the service request is the response time, considered for task assignment.

- TCA, provides information on parties and contacts and their information.
- Installed Base, provides input on the installed base information send to the Mobile applications. Used by the service representative when servicing the product.
- Inventory, provides input to determine what products are serviceable.
- Task Manager, functionality is used to create tasks to perform the field visit.

Resource Manager

All service representatives and field service dispatchers need to be defined as such in the resource manager individually. Field service dispatchers are also part of a dispatcher group created in Resource Manager to be able to access the Field Service Dispatch Center.

Territory Manager

Territory Manager is used for two purposes.

- It is used to create territories with service representatives assigned to it. These territories are then related to a dispatcher group.The service representatives assigned to the territory show up in the Field Service Dispatch Center for the dispatcher.
- It is also used to create territory qualifiers for task assignment. These territory qualifiers are used by the Assignment Manager and Scheduler to retrieve a qualified service representative for a task.

Calendar

For each service representative working hours, shifts, and non-available working hours like public holidays need to be defined. This information is used for scheduling. A service representative can also access his calendar and view his task assignments. For more information see *CRM Foundation Concepts and Procedures*.

Assignment Manager

The Assignment Manager assists in the task assignment from the Field Service Dispatch Center by finding a qualified service representative to resolve the task. Indirectly the following applications have a relationship with Field Service:

- Installed Base, a preferred service representative to perform the field visit can be recommended from the installed base.

- Contracts, a preferred service representative to perform the field visit can be recommended from Contracts, or Contracts Service.
- Territory Manager, territories with qualifiers are created to filter qualified service representatives.
- Calendar, the availability of the service representative is checked in his or her calendar.

Scheduler

Scheduler assists in task scheduling from the Field Service Dispatch Center by finding a qualified service representative to resolve the task with the right part. Scheduler uses the input from the Assignment Manager and applies it's own functionality. It takes into account driving time and distance, part availability and creates part reservations. Scheduler is tightly integrated with Spares Management.

Spares Management

Most of the times you need parts to resolve a problem at the customers site. You can access Spares Management manually to order parts for a task. When Scheduler is installed a reservation for the part is created automatically at task assignment. When the task is committed, an order for the part is created. You can update Spares Management indirectly from Field Service Report with parts usage for a task. The update is done to maintain stock levels at different locations, the subinventories.

Escalation Management

Escalations occur for a wide variety of reasons. An escalation management system allows an organization to identify, track, monitor, and manage situations that require increased awareness and swift action. Field Service summarizes and shows escalations for tasks that need to be or are scheduled.

Field Service Mobile

After task assignment the schedule is committed and send to one of the following mobile applications:

- Field Service/Laptop
- Field Service/Palm™ Devices
- Field Service/Wireless

It is received by the service representative and he can update the schedule and create a service report. The data is received back by Field Service to monitor progress and captured on the Field Service Report.

Inventory

Inventory provides input for Service Request to determine what product needs service. You can update Inventory (Spares Management) from Field Service Report with parts usage for a task. Updating Inventory is done to maintain stock levels at different locations, and subinventories. A subinventory could be a warehouse or a service representative's vehicle. Updating inventory results in activities to supply these warehouses or a service representative with new materials or to retrieve materials from them. For more information, see *Oracle Spares Management Concepts and Procedures*.

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

Installed Base

Installed Base provides input for the service request to indicate if it is an installed base item. It also provides input to the Assignment Manager regarding preferred service representatives to perform the field visit.

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

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

Interaction History

Oracle Interaction History tracks all customer-agent interactions and serves as a repository for the interaction data. You can view the interaction data as well as the Oracle CRM application data associated to the interaction. Access Interactions from the Field Service Report.

Notes

Notes provide a text area where you can enter information about a customer, product, service, or anything related to your service report that may be helpful for other service representatives or customers. Once you create a note, it can be attached to a task, sent to the customer, or submitted to the knowledge base for reuse. You can access Notes from the Field Service Report.

Charges

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

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

1.5 The Scheduling and Task Assignment Process

Task scheduling or task assignment is the core functionality of the Field Service application. Task assignment in Field Service is assisted by the Assignment Manager. Scheduler functionality is used for enhanced task scheduling. The task assignment process uses criteria based on preferred resources, resource availability, and territories to select a qualified resource for a task. When Scheduler is installed you can optimize your scheduling capabilities with a set of business driven weighting criteria defined at implementation, and calculate travel time and distance in between tasks. With Scheduler installed you can also create reservations for spare parts when scheduling tasks.

There are four options presented to you for scheduling and task assignment. When Scheduler is not installed only two options for task assignment are active.

Tasks change status during the field service process of scheduling or assigning tasks. Depending on the current status different following actions (or transitions) and statuses are possible. Task statuses and task assignment statuses are shown in the Dispatch Center enabling the dispatcher to keep track of progress. The task status flow is specific to the Field Service application and therefore explained in more detail.

Please review the following to understand more about the scheduling and task assignment process:

- Scheduling Versus Task Assignment
- Scheduling and Task Assignment Dependencies
- Scheduling and Task Assignment Criteria
- Scheduling and Task Assignment Options
- Task Status Flow

Scheduling Versus Task Assignment

There is a difference in scheduling and task assignment. The difference is that when scheduling your goal is to create a trip for each service representative within a working day consisting of the most logical sequence of tasks and load. In this perspective the need for calculating travel time and distance in between tasks, and recalculating a schedule to optimize the sequence of tasks in a trip is very logical. These are features specific to scheduling. For task assignment the sequence of tasks already scheduled or a definition of a service representative's working hours (shifts) is not considered. It is just about assigning a task to a resource based on a very small set of criteria. In addition, when scheduling, spare part availability is considered and reservations for parts are created. Scheduling is recommended over task assignment.

Scheduling and Task Assignment Dependencies

The task assignment and scheduling processes use criteria based on preferred resources, resource availability, territories, parts availability, and travel time and distance to select a qualified resource for a task. There are a few dependencies task assignment and task scheduling rely on. The following table lists the dependencies.

Dependency	Description
Preferred resource information	A preferred resource is a single person or a resource group that is defined in Oracle Contracts or recommended from the Installed Base in Oracle Service.
Territory definition	Territories are defined in Territory Manager. For more information please refer to Territory Manager.
Task duration information	Task duration is essential for checking the availability of the resource and for designating a resource as unavailable in the resources calendar after a task has been assigned. Task duration information is the amount of Effort defined at creation of the task.
Resource's availability information	Availability of the resource is provided by the Calendar component in which resources shifts and unavailability are defined. For more information please refer to Understanding Calendar.
Spare parts location and availability	Spare part location and availability information is a dependency for Scheduler to make a reservation at task assignment. Spare part information is provided by Spares Management.
Road network for calculation of travel time and distance	A road network is a dependency for Scheduler to be able to calculate travel time and distance in between tasks.

Scheduling and Task Assignment Criteria

There is a difference in how Assignment Manager and Scheduler consider selection criteria to retrieve a qualified resource for a task. Also when scheduling manually you can influence how the selection criteria are applied. When you are scheduling automatically (Scheduler functionality) an assumption is made on how selection criteria are applied. Automat scheduling can be started manually or can be run as a background process, autonomous scheduling.

Please review the following table to learn about the differences and how the criteria are used to select a qualified resource for a task:

Criteria	Assignment Manager	Scheduler	Automatic and Autonomous Scheduling
Territory Qualifiers	Used to retrieve all the qualified resources for the assignment from the selected territories.	Used to retrieve all the qualified resources for the assignment from the selected territories.	Used to retrieve all the qualified resources for the assignment from **all** territories defined.
Contracts	When selected the first resource criteria considered.	When selected the first resource criteria considered.	Selected as the first criteria considered.
Installed Base	When selected the first resource criteria considered.	When selected the first resource criteria considered.	Not used.
Resource Available	When a resource is found based on the criteria above, it's availability is considered.	The availability of the resource is always considered by Scheduler.	The availability of the resource is always considered.
My Suggestion	When entered the suggestion is always returned as a plan option.	When entered the suggestion is always returned as a plan option.	Not used.
Spares (Scheduler functionality)	Not used.	A list of qualified resources based on the criteria above is passed on to Spares Management to check parts availability based on the availability condition selected.	A list of the qualified resources based on the criteria above is passed on to Spares Management to check parts availability based on a **predefined** availability condition.

Criteria	Assignment Manager	Scheduler	Automatic and Autonomous Scheduling
Travel time and distance (Scheduler functionality applied automatically)	Not used.	Calculated are the travel time and distance for each plan option for the resources returned from the Assignment Manager (when no parts are used) or Spares Management.	Calculated are the travel time and distance for each plan option for the resources returned from the Assignment Manager (when no parts are used) or Spares Management.
Cost Related Constraints (Scheduler functionality applied automatically)	Not used.	Pre-defined business driven constraints are applied by Scheduler for each plan option to produce a list with qualified resources or available time slots.	Pre-defined business driven constraints are applied by Scheduler for each plan option to produce a list with qualified resources.

Scheduling and Task Assignment Options

There are four options presented to you for scheduling or task assignment, also referred to as assistance level, when scheduling manually. The options presented to you depend on the fact whether Scheduler is installed or not.

Please address the following table to learn more about the options for scheduling manually:

Assistance Level	Description
Unassisted	Use this option to assign a task to a service representative of your choice without taking into account any of the criteria.
Assisted	Use this option if you want Assignment Manager to find qualified resources. A list of resources found is displayed in the Advice tab.
Window to Promise	An option specific to Scheduler. Use this option if you want Scheduler to find available time slots.The Advice tab displays time slots at which a resource can visit the customer to perform the task with related cost. These time slots are offered to the customer and after selection the Planned Start and End date is set accordingly. The schedule can be optimized at a later stage.

Assistance Level	Description
Intelligent	An option specific to Scheduler. Use this option if you want Scheduler to find qualified resources. The Advice tab displays the resources found with a related cost. Typically the resource with the lowest cost addressed is the best option.

Task Status Flow

The scheduling and task assignment process is driven by task status changes specific to Field Service. Tasks enter the Dispatch Center with a task status given at creation of the task and suitable for scheduling. When the task is assigned to a resource a task assignment is created. A task assignment consists of a resource and a related task. One task can have multiple task assignments when multiple resources are assigned to the task. After task assignment you can still optimize your schedule up until the moment the schedule is committed. When the schedule is committed, tasks change status, and the task assignments are send to the resources, service representatives. Service representatives report on the task assignment status. The task assignment status is displayed in the Resources tab to monitor progress. The task status is displayed on the Plan Board, Gantt, and across all tabs in the upper region of the Dispatch Center.

The following table lists all seeded tasks statuses, their behavior, and possible statuses to change to. When each task assignment for a task is completed the task status will change to completed.

Table 1 Seeded Tasks Statuses

Task Status	Task Assignment Status	Behavior	Following Possible Statuses
In Planning	In Planning	The task is ready for planning or already assigned to a service representative. The planner is still optimizing the schedule and can assign the already assigned task to another service representative.	Assigned/ Auto Reject/ Cancelled
Auto Reject		When scheduling automatically, it can happen a task assignment fails. The task status is set to auto reject.	In Planning/ Cancelled

Task Status	Task Assignment Status	Behavior	Following Possible Statuses
Assigned	Assigned	Task is assigned to a service representative and the schedule is committed.	Accepted/ Rejected/ Working/ Completed Cancelled
	Accepted	The task is accepted by the service representative. Reporting on the task is possible.	Reject/ Working/ Interrupted/ Cancelled
	Rejected	The task is rejected by the service representative. The dispatcher can change it back to assigned to enforce the service representative to accept it or change it to in planning to assign it to another service representative. Reporting on the task is possible.	In Planning/ Assigned/ Accepted/ Working/ Cancelled
	Working	The service representative started working on the task. The actual start time is entered, enabling the dispatcher to view progress on the schedule and view predicted start times of tasks scheduled next. Reporting on the task is possible.	Interrupted/ Completed/ Cancelled
	Interrupted	The work on a task has stopped. The dispatcher can assign it to another service representative changing the status to in planning or assign it to the same service representative at a later point in time. The service representative can also continue working on the task. Reporting on the task is possible.	In Planning/ Assigned/ Working/ Completed/ Cancelled
Cancelled	Cancelled	The task is cancelled. The dispatcher can assign it to the same representative again by changing the task status to assigned or change the status to in planning to assign it to another service representative. Reporting on the task is possible.	In Planning/ Assigned/ Closed

Task Status	Task Assignment Status	Behavior	Following Possible Statuses
Completed	Completed	The task is done and frozen. No updates or reporting on the task is allowed anymore.	Closed
Closed		The field service report for the task is reviewed and pushed to charges. Updates to the installed base and knowledge base are made.	None

1.6 What is the Field Service Dispatch Center?

The Field Service Dispatch Center is a one stop planning area where you can schedule, dispatch, and monitor tasks for service representatives out in the field. A dispatcher can view all incoming tasks and then schedule these tasks to create a trip for each service representative. A trip includes all tasks for one service representative within a working day. A trip consists of a start time and location, which is defined as a departure task, and an end time and location, which is defined as an arrival task. All tasks are scheduled between the departure and arrival tasks. In addition to scheduling tasks, the Dispatch Center allows you to act on escalations, and monitor service representative's progress and schedules using the plan board and gantt. You can also make last minute changes to schedules and view your service group's status and location on the map.

Reviewed in more detail is:

- What Tasks and Resources do I see?
- Navigating in the Dispatch Center

What Tasks and Resources do I see?

When you enter the Dispatch Center what tasks are available to you, and what resources are shown to you?

During implementation of Field Service it is defined what resources are shown to you by default. Dispatcher groups have been created of which you are a member (mandatory) and territories with service representatives assigned to them have been created. A relation between the dispatcher group(s) and the territor(y)(ies) has been established. These are the service representatives shown to you in the Dispatch Center on the Plan Board, Gantt, and Map. This feature is mainly meant for monitoring purposes. When you are a large organization you mostly monitor a group of service representatives and not all of them. However, you can always

choose to view all territories or a selection of territories by selecting the option from the Navigate menu in the toolbar.

By default all schedulable tasks are available to you and could be offered to you for scheduling. You can narrow down to a selection of tasks for scheduling by choosing an appropriate query from the Tasks list or by defining your own query. It is also possible to only receive the tasks you are the owner of for scheduling when defined at setup. From the tasks that are offered to you for scheduling it might very well happen that the most eligible service representative to assign the task to is not one of the service representatives you monitor. The most eligible service representative is however always presented as the best option regardless the group of service representatives you are monitoring.

Navigating in the Dispatch Center

In the left region of the Dispatch Center window, the Tasks list, you can view tasks by a selection from the list of values. You can also define your own query to find tasks by using the flashlight icon. When you move your cursor over a task from the task list, details are displayed in the upper region of the Dispatch Center. Bolded tasks indicates that a task is ready for planning. To select a task for planning you need to check it.

In the upper region of the Dispatch Center you can view Task Details. All tabs display the task number, status, response time, and planned effort, defined at task creation.

Displayed in more detail in the various tabs are:

- Overview: Task description, customer information, task urgency, planned start and end dates (date when a service representative is supposed to arrive at a customers site), and scheduled start and end date (date when a service representative is actually visiting the customer). Indicated is if parts are necessary to resolve the task.
- Service Request: Displayed are service request number, date service was requested, a summary, and problem and resolution description. Select and right click the Request field to bring up a pop-up menu to access the source document.
- Escalations: When for some reason a task becomes non-conforming, the reason is shown through escalation notifications. A summary of escalations is shown.
- Spares: Shown are the reserved parts and their status for an already scheduled task. You can access the Spares Management application for the task selected to view more detail.

- Product: Customer product description, serial number and lot number. Contract type, contract description, and product revision. Indicated is if it is an installed base product or not.
- Resources: Shown are the service representatives assigned to the task, their status, and travel time from the previous location to the selected task.
- Address: Shown is the address to visit, also known as the installed at address.

In the lower region of the Dispatch Center you can monitor and schedule tasks for a group of service representatives on the Plan Board, Gantt, and Map. By default a group of service representatives is shown to you, defined at setup as described in the previous section, but you can choose to view other groups of service representatives from the Navigate Menu on the toolbar. Choose Select Territories to make a selection of territories with service representatives assigned to them to be shown on the Plan Board, Gantt, and Map.

How to use the Plan Board, Gantt, and Map:

- Plan Board: The plan board contains a grid populated with the service representative's name and his trip. A trip consists of departure and arrival tasks, and scheduled tasks for the day. Shown is today's date but you can select any date you like. Select and right click the service representative's name to bring up a popup menu to view resource details or optimize his trip (sequence of tasks). Select and right click on one of the tasks to bring up a popup menu to show the source document, start a field service report, or send a message. Select and right click on an empty cell in the service representative trip to bring up a popup menu to assign a task.
- Gantt: The Gantt chart view is a quick graphical overview of the scheduled tasks based on time. The date range shown by default is two days before the actual date and two weeks ahead of it. The date range is adjustable. The Gantt shows you a service representative's shift, and his assigned tasks and the travel time in between tasks (when Scheduler is installed). Put your cursor on a task and task details are shown. Select and right click a task to bring up a popup menu to access the source document.
- Map: The Map is a quick geographical overview of a service representative's real time location and status. The date shown for the map is the actual date.You can also get an overview of tasks with their location, by first selecting and checking them in the task list and then clicking the Tasks button on the Map. From the map you can easily assign tasks and access source document details. Select and right click a service representative or task to bring up a popup menu to access source document details. When a task is checked from the task list, double clicking a service representative will start task assignment.

The buttons at the bottom of the screen enable you to do the following:

- Auto Schedule: Before using this button, check a task or multiple tasks from the task list. It automatically schedules tasks to resources using the selection criteria from either the Assignment Manager or Scheduler (when installed). For more information on scheduling criteria please refer to The Scheduling and Task Assignment Process.
- Advise: Before using this button, check a task from the task list. Opened is the Scheduling Advice window to assist you in assigning a task to a resource using selection criteria from either the Assignment Manager or Scheduler. For more information on scheduling criteria please refer to The Scheduling and Task Assignment Process.
- Go to: Click in combination with the Plan Board, Gantt, or Map. You can search for a particular resource to be presented on the Plan Board, Gantt, or Map.
- Refresh: Click to refresh the Plan Board, Gantt, or Map.
- More: Click More to enlarge the Plan Board, Gantt, or Map.

Use the Navigate menu from the toolbar to access the Commit Schedule window to manually commit tasks or schedules to service representatives. This can also be done automatically when setup at implementation. Use the Navigate menu to navigate to the service request or spares management application populated with the details for the task selected from the task list. You can also use it to populate the Plan Board, Gantt, and Map with territories of service representative other then the ones shown to you.

1.7 What is the Field Service Report?

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

When all the information was captured on one of the Field Service/Mobile applications it is uploaded and displayed on the Field Service Report for review and to update the customer's installed base, spares inventory, and charges information.

The upper half of the Field Service Report is populated with task assignment details. You can change the task assignment status to reflect the current status.

The main features in Field Service Report are:

- Reporting on Materials
- Reporting on Expenses
- Reporting on Labor
- Reporting on Counters
- Integration with Spares Management
- Quick Menu

Reporting on Materials

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

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

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

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

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

Reporting on Expenses

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

Update Charges for the expense transaction lines created to make sure these costs are covered by contract or need to be invoiced to the customer.

Reporting on Labor

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

Update Charges for the labor transaction lines created to make sure these costs are covered by contract or need to be invoiced to the customer.

Reporting on Counters

A button Counters is present on the Field Service Report at the bottom of the main window. This button is enabled only when the product being serviced has an attached counter in the Installed Base, otherwise the button is disabled.

By selecting the Counter button, the Counters window is opened. This window displays in a spread table all counters setup for that customer product. Double clicking a line from that spread table, opens the Capture Counter Reading window.

Integration with Spares Management

From the Tools menu on the toolbar of the Field Service Report main window, the following Spares Management functions can be started populated with information regarding the service request or task:

- View Move Order: Used to view the status of a move order. It tracks quantities through the process, date and time, and key details such as picklist, packlist, carrier and waybill. You can easily access the Move Order UI.

- Create Move Order: Used to request transfer of parts between subinventories within the same organization. Move Order must be Approved to permit further processing. Additional processing not allowed if move order status is Incomplete.
- View Onhand Quantity: Used to review onhand balances for the Item at the subinventory level.

For details regarding Spares Management please refer to the *Spares Management Concepts and Procedures*, Understanding Spares Management.

Quick Menu

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

- Installed Base
- Service Request
- Spares Management

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

2

Using Field Service Dispatch Center

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

Please refer to Working with the Field Service Dispatch Center for more information.

2.1 Working with the Field Service Dispatch Center

The Field Service Dispatch Center assists you in task scheduling, and monitoring service representative's schedules.

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

- Finding Tasks

  You need to populate the Dispatch Center with tasks. Learn from this procedure different ways to populate the Dispatch Center with tasks.

- Viewing Task Details

  To get a good overview on all the information related to a task different tabs are available. Learn from this procedure what all the tabs are about.

- Selecting Territories

  The Dispatch Center is populated with a group of service representatives that show up on the Plan Board, Gantt, and Map. Learn from this procedure how to populate the Dispatch Center with a different group of service representatives.

- Working with the Plan Board

  The Plan Board provides information on service representative's schedules in a daily view. From the Plan Board you can start a field service report, assign a

task, send a message, access the source document, recalculate a trip, and get resource details. Learn from this procedure how to use the Plan Board.

- Working with the Gantt

  The Gantt provides information on service representative's schedules for a period of time. The Gantt allows for task reassignment. Learn from this procedure how to use the Gantt.

- Working with the Map

  The Map provides information on service representatives schedules for the current date geographically visualized. The Map gives you the opportunity to display tasks and their location and allows for task assignment. Learn from this procedure how to use the Map.

- Scheduling Tasks

  There are several ways and options to assign (schedule) tasks to service representatives. After task assignment you can also optimize a service representative's trip, reassign a task, or cancel a scheduled task. Learn from this procedure how to schedule tasks, cancel tasks, recalculate a trip, or reassign a task.

- Committing the Schedule

  After task assignment you need to commit the schedule so it is send to the service representatives. Learn from this procedure how to commit the schedule.

- Reporting on Tasks

  Learn from this procedure how to access the Field Service Report to open or create a Field Service Report.

- Viewing Service History

  You can view the service history for a customers site or a product. Learn from this procedure how to view service history.

2.2 Finding Tasks

Use this procedure to populate the Tasks list in the Dispatch Center with tasks. Once you have populated the Dispatch Center with tasks, you can assign them or review them. Tasks that are shown in bold are schedulable.

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Make a selection from the View By list of values in the Tasks list to use a predefined query to search for tasks. By default the following queries have already been created with the following values:

Query Name	Description	Query Definition
Inbox	All tasks that are schedulable, entered today and haven't been assigned yet.	creation_date > trunc(sysdate) and scheduled_start_date is null and nvl(status_schedulable_flag,'N') = 'Y' and nvl(type_schedulable_flag,'N') = 'Y'
All Open	All tasks that are available for planning and schedulable.	nvl(status_schedulable_flag,''N'') = ''Y'' and nvl(type_schedulable_flag,''N'') = ''Y'' and not exists (select '''' from csf_ct_task_assignments where task_id = csf_ct_tasks.task_id)
Auto Rejected	All tasks that are rejected by the Autonomous Scheduler.	task_status_id = 27
Assigned	All task that are already assigned.	task_status = assigned
Non-Schedulable	All non schedulable tasks.	tasks with schedulable_flags = ''N''
Auto Scheduling	All tasks that can be scheduled by the Autonomous Scheduler.	Task_status = Auto in planning

3. To find tasks that do not conform to one of the predefined queries click the flashlight icon on the toolbar. The Find Tasks window is opened.
4. Enter information to retrieve the kind of tasks you want to view. You can query on a specific task or service request number, service request or task

specifications, tasks you are the owner of, tasks that are assigned to you, tasks for a specific customer, tasks that need to be scheduled, have been scheduled, or have been started for a selected date or date range. You can create a query based on a combination of search criteria.

5. Click **Find**. The Tasks list of the Dispatch Center is populated with tasks matching the query definition.
6. To add your query to the list of values from the Tasks list, choose **Save Query As** from the Tools menu on the toolbar. The Save Query As window is opened.
7. Enter a Name for the query, this name is returned in the list of values in the Dispatch Center. Enter a Description for the query and an Active Start and End Date.
8. Click **OK**. The query is added to the list of values when selecting View By from the Tasks region.
9. To edit the query choose **Edit Query** from the Tools menu on the toolbar. The Edit Query window is opened. You can modify the information but you can not delete a query. When the Active End date is reached the query will disappear from the list of values when selecting View By from the Tasks region.

2.3 Viewing Task Details

The upper region from the Dispatch Center provides you with detailed information for a selected task from the Tasks list.

Use this procedure to learn about the details displayed in the following tabs:

- Overview
- Service Request
- Escalations
- Spares
- Product
- Resources
- Address

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Populate the Tasks list with tasks.
3. Select a task from the Tasks list.
4. Choose one of the following tabs:
   - Overview
   - Service Request
   - Escalations
   - Spares
   - Product
   - Resources
   - Address

Overview tab

Displayed in the Overview tab are the task details as described in the following table.

Field	Description
Number	Task number, generated at creation of the task.
Status	Task Status.
Effort	At creation of the task, estimated is the amount of time is takes to perform the task.
Name	A description of the task is given.
Respond By	Response time agreed upon with customer either by contract or other means of communication. When response time is not met, the task becomes non-conforming and an escalation notification is created.
Priority	The urgency given to the task.
Type	Task type definition. (For schedulable tasks the task type rule must be Dispatch, this is defined at implementation)
Parts	Indicates if spare parts need to be ordered, when Scheduler is installed this is done at task assignment.

Field	Description
Customer	Customer's name.
Telephone	Customer's telephone number.
Fax	Customer's fax number.
Planned Start and Planned End	In between planned start and end date a service representative is supposed to arrive at the customers site.
Scheduled Start	The actual scheduled time a service representative is arriving at the customers site.
Scheduled End	The scheduled end date is either the start date plus the effort or the end date of the time window offered to a customer when it was scheduled with the Window to Promise.

Service Request tab

When the task originates from a service request, details for the service request are displayed in this tab as described in the following table.

Field	Description
Request	Service request number. Right click this field to bring up a pop up menu to access the service request form.
Order Date	Date the service request was created.
Summary	A summary of the service request.
Organization Unit	The organization unit the service request belongs to.
Problem	A problem description for the service request.
Resolution	A resolution description for the service request.
Service History	You can view the service history for a customers site or a product by clicking this button. For more details please refer to Viewing Service History.
Task	Task information for your reference is displayed.

Escalations tab

The escalations tab gives you a summary and status of all the present escalation notifications. An escalation occurs when a task becomes non-conforming. This means when some of the criteria for a task to be assigned and resolved can't be met or are close to not being met. For instance when contract agreements guarantee a

four hour response time and it takes only another half an hour until that response is passed and the task hasn't been assigned yet.

Spares tab

The spares tab gives a summary of the spare parts necessary to resolve the task and their status. To access the Spares Management application choose Spares Management from the Navigate menu on the toolbar.

Product tab

The product tab shows details about the product from the service request. Additional information is displayed when the product is defined as an installed base item. The Installed Base flag is checked if Installed Base validation was selected on the service request.

Field	Description
Request	The related service request number.
Description	A description of the product.
Serial number.	Serial number when applicable.
Lot	Lot number when applicable.
Installed base	Indicates if the product is defined as an installed base item.
Contract Type	The contract type for the product when applicable.
Description	A description of the contract type.
Revision	Revision number when applicable.
Task	Task information for your reference is displayed.

Resources

When the task is scheduled, the resources tab shows you which service representative or service representatives are assigned (Assignee) to the task and their status. When Scheduler is installed a route description is given.

Field	Description
Assignee	The name of the service representative the task is assigned to.
Type	The resource type.

Field	Description
Status	The status of the service representative assigned to the task. This status field is updated when it is updated by a service representative at work out in the field.
Travel Time	The amount of travel time from the previous task to the current task.
More	Click **More** to display the route information.
Task	Task information for your reference is displayed.

Address

Shown are the addresses of the customer and the product that needs service.

2.4 Selecting Territories

Use this procedure to select a group or groups of service representatives. The Dispatch Center shows the group or groups selected on the Plan Board, Gantt, and Map.

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center > (M) Navigate > Select Territories**.
2. Make a selection from the territories assigned to you.
3. To view all territories including the ones not assigned to you check the **Show all territories** box.
4. Click **OK**.

   The groups of service representatives selected are displayed on the Plan Board, Gantt, and Map.

2.5 Working with the Plan Board

Use the plan board to view scheduled tasks for a service representative or a group of service representatives. You can also assign tasks, optimize the schedule, start a field service report, and access source document details.

On the Plan Board displayed are the service representatives with their departure, arrival, and assigned tasks. The departure and arrival tasks represent the start and end location of the service representative, very often the home address, and are created to calculate the route from the start location to the first task assignment, and from the last task assignment to the end location. In between the departure and arrival tasks, field service tasks are scheduled. For each task the number, customer name and city, and task status are shown.

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Plan Board tab. The tasks and trips for the current day for the group of service representatives you are monitoring are shown.
3. Click **More** to enlarge the plan board.
4. Select **Date** to change the date to view.
5. Click **Goto** to focus on a specific service representative. The service representative's name is highlighted and visible on the plan board.
6. Right clicking the service representative's name on the plan board brings up a popup menu.
   a. Click **Resource Information** to view service representative's details such as Name, Phone number, and Email address.
   b. Click **Recalculate Trip** to optimize a service representative's trip. The Scheduler needs to be installed to perform this task.
7. Right clicking a task brings up a popup menu.
   a. Click **Show Source Document** to open the window the task is created from.
   b. Click **Debrief** to report on a performed task. The Field Service Report window is opened.

c. Click **Send Message** to send a message to another user.

d. Click **Assign Task**, available when right clicked on an empty cell in the trip and when a task was selected from the Tasks list, to assign a task to the service representative. The Assignment Manager or Scheduler is opened with the service representative's name populated in the My Suggestion field.

8. To view other service representatives, choose Select Territories from the Navigate menu on the toolbar.

2.6 Working with the Gantt

Use the Gantt to view progress on the service representatives schedules or use it for task assignment. A time line is shown to indicate the current date and time. Use this procedure to learn the possibilities of using the Gantt.

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

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Gantt tab. Shown are service representatives with their shifts and assigned tasks.
3. Click **More** to enlarge the Gantt.
4. Select a date at **From** and **To** to define a date range you want to view.
5. Click **Goto** to focus on a specific service representative's schedule. The service representative's name is highlighted and visible.
6. Right click the date or time on the gantt chart header to change the view of the gantt chart.
7. View a task description by moving the mouse over a task. Wait a moment and a task description is shown.

8. To view task details double click a task. The source document is opened showing the task details. For example for a service request task the Service Request window is opened.
9. Move a task from one service representative to the other by dragging and dropping it.

> **Note:** When using drag and drop, no check is performed if it is the best or even a possible option.

2.7 Working with the Map

On the map the service representatives are shown in a geographical representation with an easy to view status for the current date. Use this procedure to learn the possibilities of using the Map. You can use the map for monitoring as well as scheduling purposes.

Prerequisites

A spatial data product should be installed for Map display.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Map tab. Shown are the service representatives you are managing.
3. Optionally click **Reset** to show the map in it's entirety when only a fragment is shown.
4. To change map choose it from the list of values in the Service Area.
5. Click **More** to enlarge the Map to full window size.
6. Click **Goto** to focus on a specific service representative.
7. Use the Zoom and Navigate buttons to navigate through the map. You can also draw a box on the map with your pointer device to zoom in to that particular area.
8. To view a task or tasks on the map select them from the task list by checking them. Click **Show** from the Tasks area. The selected tasks with their location are shown on the map.
9. Double click on a task for details. The Service Request window is opened showing the Task tab.

10. To assign a task to a service representative check a task from the task list and double click on a service representative of your choice, the Assignment Manager or Scheduler (when installed) is opened. The service representative is defaulted as the option for My Suggestion.
11. Click **Clear** to remove the tasks from the map.

> **Note:** The tasks remain checked in the task list.

12. Click **Save** to save your current map settings, this is used to display the map the next time you use the map.

2.8 Scheduling Tasks

There are different ways to schedule tasks from the Dispatch Center. Choose one of the following options to learn more about scheduling tasks.

Options for scheduling are:

- Scheduling a Task Manually
- Selecting a Schedule Option
  - Scheduling Using the Unassisted Option
  - Scheduling Using the Assisted Option
  - Scheduling Using the Window to Promise Option
  - Scheduling Using the Intelligent Option
- Scheduling a Task for Multiple Resources
- Scheduling a Single Task or Multiple Tasks Automatically
- Viewing Failed Autonomous Schedule Assignments
- Recalculating a Service Representative's Trip
- Recalculating All Trips
- Cancelling a Scheduled Task
- Reassigning a Scheduled Task

2.9 Scheduling a Task Manually

You can assign a task to one or more field service representatives manually in three ways:

- From the Plan Board
- From the Map
- From the Dispatch Center (Advise button)

The Scheduling Advice window is always opened to assist you in the assignment. When the Scheduler is installed all options for scheduling are available to you. When the Scheduler is not installed only the Assisted and Unassisted options are available and you make use of Assignment Manager functionality.

When scheduling from the Plan Board or Map, you make a suggestion for a field service representative to be taken into account when the scheduling criteria are applied. When based on the scheduling criteria no suitable service representative was found, your suggestion is still presented as an option. When scheduling from the Dispatch Center (Advise button) only those service representatives that are suitable based on the scheduling criteria applied are presented to you. It could happen no service representatives are found.

Use this procedure to schedule a single task manually.

Prerequisites

Make sure you read the The Scheduling and Task Assignment Process topic from the Understanding section.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Populate the Tasks list with tasks.
3. Check the box next to the task you want to schedule.
4. There are several options to plan manually, choose one of the following:
   - Click **Advise**. The Scheduling Advice window is opened.
   - On the Plan Board, select an empty cell in the service representative's trip and click the right mouse button. Click **Assign Task** from the popup menu. The Scheduling Advice window is opened. The service representative's name is populated in the My Suggestion field.
   - On the Map, double click on a service representative of your choice.The Scheduling Advice window is opened. The service representative's name is populated in the My Suggestion field.
5. Choose an Assistance Level to help you with the assignment. For more information please refer to Selecting a Schedule Option or choose one of the following options directly:
   - Scheduling Using the Unassisted Option
   - Scheduling Using the Assisted Option
   - Scheduling Using the Window to Promise Option
   - Scheduling Using the Intelligent Option

2.10 Selecting a Schedule Option

There are four options presented to you for scheduling from the Scheduling Advice window. The options are presented as Assistance Level.

Choose one of the following options to learn more about the options presented for scheduling:

- Scheduling Using the Unassisted Option
- Scheduling Using the Assisted Option
- Scheduling Using the Window to Promise Option
- Scheduling Using the Intelligent Option

2.11 Scheduling Using the Unassisted Option

Use the Unassisted option to assign a task to a resource of your choice. None of the criteria or Scheduler features are applied. This means that if parts are required for the task, you need to order them separately.

Prerequisites

Make sure you read the The Scheduling and Task Assignment Process topic from the Understanding section.

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click **Unassisted**.
4. In the My Suggestion region make an entry for the resource Type or Name.
5. Click **Search**. The resource or resources are displayed in the Advice tab.
6. Double click on a resource of your choice. The Start and End fields are populated with the scheduled date.
7. Click **Schedule**. A task assignment is created.
8. The Plan Board and Gantt are refreshed.

2.12 Scheduling Using the Assisted Option

Use the Assisted option to assign a task to a resource based on a selection of criteria using Assignment Manager functionality. Spare parts availability is not taken into account. This means that if parts are required for the task, you need to order them separately.

Prerequisites

Make sure you read the The Scheduling and Task Assignment Process topic from the Understanding section.

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click **Assisted**.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, or a resource recommended from Installed Base. Also select if you want to check a resources availability.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. Click **Search**. The qualified resources found are displayed in the Advice tab.

   Already assigned tasks show up in blue, schedule options show up in green.
7. Double click on a resource of your choice. The Start and End fields are populated with the scheduled date.
8. Click **Schedule**. A task assignment is created.
9. The Plan Board and Gantt are refreshed.

2.13 Scheduling Using the Window to Promise Option

The Window to Promise option is only available when Scheduler is installed. Use the Window to Promise option to assign a time slot to a resource based on a selection of criteria using Scheduler functionality. Displayed are possible time slots to offer a customer with related cost.

After task assignment with the Window to Promise a time slot is reserved for a customer and the Planned Start and End dates are set accordingly. A time slot is also assigned to a resource but later in the process you can choose to optimize the assignment by assigning it to another resource or optimize the resources trip.

Prerequisites

Oracle Scheduler is installed. Make sure you read the The Scheduling and Task Assignment Process topic from the Understanding section.

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click **Window to Promise**.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, or a resource recommended from Installed Base.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. In the Spares region choose an Availability Condition from the list of values. For more information on availability conditions please refer to Understanding Scheduler.
7. Click **Search**. The possible time slots with related cost are displayed in the Advice tab.
8. Select an option from the list of values at View Window to view only the options for a certain time slot.
9. Select a time slot of your choice and click **Schedule**. The Planned Start and End date for the task is set accordingly. A task assignment is created.
10. The Plan Board and Gantt are refreshed.

Guidelines

The time slot with the lowest cost addressed is in most cases the best option to offer your customer.

2.14 Scheduling Using the Intelligent Option

The Intelligent option is only available when Scheduler is installed. Use the Intelligent option to assign a task to a resource based on a selection of criteria using Scheduler functionality.

Prerequisites

Oracle Scheduler is installed. Make sure you read the The Scheduling and Task Assignment Process topic from the Understanding section.

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click **Intelligent**.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, or a resource recommended from Installed Base.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. In the Spares region choose an Availability Condition from the list of values. For more information on availability conditions please refer to Understanding Scheduler.
7. Click **Search**. The qualified resources with related cost found are displayed in the Advice tab.

   Already assigned tasks show up in blue, schedule options show up in green. Travel time in between tasks are transparent.
8. Double click on a resource of your choice. The Start and End fields are populated with the scheduled date.
9. Click **Schedule**. A task assignment is created.

2.15 Scheduling a Task for Multiple Resources

You can assign a task to multiple resources, this can only be done assisted by the Assignment Manager and has to be done manually.

Use this procedure to assign a task to multiple resources.

Prerequisites

Make sure you read the The Scheduling and Task Assignment Process topic from the Understanding section.

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click **Assisted**.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, or a resource recommended from Installed Base. Also select if you want to check a resources availability.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. Click **Search**. The qualified resources found are displayed in the Advice tab.

   Already assigned tasks show up in blue, schedule options show up in green.
7. Select a resource of your choice and to add it to an already assigned task, check the **Add Resource** checkbox.
8. Click **Schedule**. A task assignment is created.

2.16 Scheduling a Task or Tasks Automatically

You can schedule a single task or multiple tasks automatically directly from the dispatch center. The scheduling criteria applied come from Scheduler and use default settings. It is also possible to run a concurrent program, Autonomous Scheduler, that schedules tasks automatically in the background without interference of a dispatcher. This is setup at implementation.

Use this procedure to schedule a single task or multiple tasks automatically from the Dispatch Center.

Prerequisites

Oracle Scheduler is installed. Make sure you read the The Scheduling and Task Assignment Process topic from the Understanding section.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Populate the Tasks list with tasks.
3. Check the box next to the task you want to schedule. To check all tasks at once choose **Select All Tasks** from the Tools menu on the toolbar.
4. Click **Auto Schedule**. The Plan Board and Gantt are refreshed.

   When during the scheduling process an assignment for a task fails, you are prompted with an error message telling you why scheduling failed. Resolve the issue for the task. The Auto Schedule process needs to be re initiated to schedule the remainder of the tasks.

2.17 Viewing Failed Autonomous Schedule Assignments

Use this procedure when a concurrent program, Autonomous Scheduler, is active that schedules tasks automatically in the background without involvement of a dispatcher. The program picks up tasks to schedule at set time intervals. This is Scheduler specific functionality.

When Scheduler is not able to schedule a task for some reason, the task status is set to Auto Rejected. This enables you to find failed tasks more easily from the Dispatch Center. An output file is generated with a problem description for the failed task. When the problem for the task has been resolved, change the status back to a schedulable status.

Use this procedure to view the output file with the problem description for the task.

Prerequisites

Oracle Scheduler is installed.

Steps

1. Navigate to **Field Service Dispatcher > Other > View Requests**. The Find Requests window is opened.
2. Click **Submit a New Request**. The Submit a New Request window is opened.

3. Choose the Single Request option.
4. Click **OK**. The Submit Request window is opened.
5. At Name choose **Autonomous Auto Schedule** from the list of values and click **OK**.
6. Click **Submit**. The Decision window is opened.
7. Click **No**. You will return to the Find Requests window.
8. Click **Find**. The Request window is opened.
9. Look for the requests with the Name Autonomous Auto Schedule. Check the Phase and Status. If Phase is Completed and the Status is something other then Normal, something went wrong during the process of assigning a task to a resource when executing the Autonomous Auto Schedule program.
10. Click View Output to view the output file with the problem description for the task.

2.18 Recalculating a Service Representative's Trip

Use this procedure to update and optimize a service representative's trip after task assignment and before task commitment. This will eliminate time conflicts within the trip and reset the scheduled start times of all tasks in the trip, accordingly.

Prerequisites

Scheduler must be installed.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Plan Board.
3. Select the service representative's name and right click it. The popup menu appears.
4. Click **Recalculate Trip**.

2.19 Recalculating All Trips

Use this procedure to update and optimize all service representatives trips shown on the Plan Board after task assignment, and before task commitment. This will eliminate time conflicts within the trip and reset the scheduled start times of all tasks in the trip, accordingly.

Prerequisites

Scheduler must be installed.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Plan Board. Make sure all the service representatives you want to recalculate the trips for are shown on the Plan Board. Refer to the Selecting Territories procedure to do so.
3. From the Tools menu select **Recalculate All Trips**.

2.20 Canceling a Scheduled Task

To cancel a scheduled task you need to cancel all task assignments for the task. Once a task is canceled you can choose to schedule it again or close it.

Use this procedure to cancel a scheduled task or task assignment.

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Populate the Tasks list with the task.
3. Select the task (no need to check it).
4. Select the Resources tab.
5. Change the task assignment Status for each resource to **Cancelled**.
6. Click **Save**.
7. Click **Refresh**, the task status is changed accordingly.

2.21 Re-assigning a Scheduled Task

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

Prerequisites

None.

Steps

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Gantt tab.
3. Select a task in the service representative's trip, drag and drop it onto the service representative you want to assign the task to.

   Note: When using drag and drop, no check is performed if it is the best or even a possible option.

4. Click **Undo** to cancel the drag and drop action.

2.22 Committing the Schedule

You have to commit the schedule so it get's communicated to the service representatives. Also at commitment, any parts reservations created by Scheduler at task assignment are ordered when the schedule is committed. Committing the schedule can be done manually as well as automatically. For automatic commitment a concurrent program runs in the background. This is setup at implementation.

Use this procedure to change task status for all tasks for a selected date manually.

Prerequisites

None.

Steps

1. Navigate to Commit Schedule:
   - **(R) Field Service Dispatcher > Commit Schedule**.

- **(R) Field Service Dispatcher > Dispatch Center > (M) Navigate > Commit Schedule**.

The Commit Schedule window is opened.

2. Select the Schedule tab.
3. Indicate the date to the commit schedule for at Time Frame. This could be for schedules created in the past hour but also for one or more days.

   When this area is left blank, all schedules found for the selected task status are committed.
4. At Resource define a specific resource or a resource group to commit the schedule for. When this area is left blank, all schedules for the selected task status are committed.
5. Select the Options tab.
6. Make a selection from the list of values at From and To to define the tasks status transition at commitment.
7. Click **OK**. The schedule is committed. The Task Status is changed to the status defined at To in the previous step.

2.23 Reporting on Tasks

In Field Service Report you can report on labor time, parts used, expenses made, and record counter readings.

Use this procedure to start or open a field service report for a task from the Dispatch Center.

Prerequisites

None.

Steps.

1. Navigate to **Field Service Dispatcher > Dispatch Center**.
2. Select the Plan Board.
3. Select the task you want to report on and right click it. The popup menu appears.
4. Click **Debrief**. The Field Service report window is opened with the task information populated.

5. Please refer to Working with Field Service Report for details.

2.24 Viewing Service History

Use this procedure to view the service history for a customer site or a product.

Prerequisites

None.

Steps.

1. Navigate to:
   - **Field Service Dispatcher > Service History**.
   - **Field Service Dispatcher > Dispatch Center > (M) Navigate > Service History**.
2. The Service History window is opened.
3. To view service history by customer address make a selection from the Site list of values.
4. To view service history for a specific product make a selection from the Unit list of values.
5. You can also create a combined query.
6. Refine your query by entering values at Ordering Date Period and choose a Problem description from the list of values.
7. Click **Search**..

3

Using Field Service Report

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

Topics covered are:

- Opening a Field Service Report
- Viewing Notes
- Accessing your Calendar
- Viewing Interactions
- Entering Materials
- Entering Expenses
- Entering Labor Time
- Recording Car Mileage
- Recording Counter Readings
- Viewing Move Orders
- Creating Move Orders
- Viewing Onhand Quantity
- Updating a Field Service Report
- Updating the Task Assignment Status

3.1 Working with Field Service Report

The Field Service Report is used to report on task assignment status, material used, time spent, expenses made, and record counter readings.

Choose one of the following to guide you through Field Service Report:

- Viewing Notes
- Accessing your Calendar
- Viewing Interactions
- Entering Materials
- Entering Expenses
- Entering Labor Time
- Recording Car Mileage
- Recording Counter Readings
- Viewing Move Orders
- Creating Move Orders
- Viewing Onhand Quantity
- Updating a Field Service Report
- Updating the Task Assignment Status

3.2 Opening a Field Service Report

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

Prerequisites

None

Steps

1. Navigate to:
   - **Field Service Representative > My Tasks**.
   - **Field Service Manager/Dispatcher > Field Service Report**.

   The Find Tasks window is opened.

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

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

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

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

3.3 Viewing Notes

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

Prerequisites

None

Steps

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

3.4 Accessing your Calendar

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

Prerequisites

None.

Steps

1. Navigate to the Field Service Report window.

2. Click **Calendar**. The Calendar window is opened.
3. For detailed instructions please click the **Help** icon.

3.5 Viewing Interactions

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

Prerequisites

None.

Steps

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

3.6 Entering Material

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

Prerequisites

A task with a status to report on.

Steps

1. Navigate to the Field Service Report window.
2. Select the Materials tab.
3. Choose a Transaction Type from the list of values. This is the activity you are going to perform for the material you are reporting on. Based on this selection fields need to be populated further down the material line. Fields that are

greyed out don't need to be populated. Fields that are white are optional and fields that are yellow are mandatory.

4. Choose one of the following options from the Parts Used/Recovered list of values:

   - **Recovered Parts** to report on a material recovered from the item at the customers site. This can be taken out of the customers Installed Base.
   - **Used Parts** to report on a material used from your subinventory at the customers site. This can be put into the customers Installed Base.

   When only one option is possible for the Transaction Type chosen previously, the value is defaulted.

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

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

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

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

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

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

11. Choose a Service Date from the date list of values. The system date is defaulted.
12. Optionally choose a Reason for the material transaction from the list of values.
13. The Disposition field is defaulted once the Item is selected.
14. Choose the Parent Product for the item from the list of values in case of an Installed Base item.

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

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

Guidelines

You can create multiple material transaction lines before saving and updating. For replacements you always need at least two material transaction lines, one for the part taken out/removed and one for the part put back in/installed. When you have performed an update you can't modify the transaction lines that have been successfully updated. You can however still add new material transaction lines and update them.

3.7 Entering Expenses

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

Prerequisites

A task with a status to report on.

Steps

1. Navigate to the Field Service Report window.
2. Select the Expenses tab.

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

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

Guidelines

You can create multiple expense lines before saving and updating. When you have performed an update you can't modify the expense lines that have been successfully updated. You can however still add new expense transaction lines and update them.

3.8 Entering Labor Time

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

Prerequisites

A task with a status to report on.

Steps

1. Navigate to the Field Service Report window.
2. Select the Labor tab.

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

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

Guidelines

You can create multiple labor lines before saving and updating. When you have performed an update you can't modify the labor lines that have been successfully updated. You can however still add new labor transaction lines and update them.

3.9 Recording Car Mileage

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

Prerequisites

You need to create a labor line.

Steps

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

3.10 Recording Counter Readings

Optionally you can record counter readings. Counter readings can only be recorded for customer products defined in the installed base which have an counter assigned to them. When the button is greyed out, no counter readings are associated with the product. Use this procedure to capture counter readings.

Prerequisites

A Counter Group must be setup and instantiated.

Steps

1. Navigate to the Field Service Report window.
2. Click **Counters**. The Counters window is opened.
3. Select the counter of your choice and double click it. The Capture Counter Reading window is opened.
4. Enter a value for the counter reading.
5. Click **OK**. The value is saved.

3.11 Viewing Move Orders

Simple move orders for parts within a single inventory organization can be processed using the Move Order process. The View Move Order Status window allows the viewing of move order details at every step in the logistics process.

Use this procedure to open the View Move Order Status window.

Prerequisites

Spares Management is implemented.

Steps

1. Navigate to the Field Service Report window.
2. From the Tools menu click **View Move Order**. The Find Move Orders window is opened.
3. Enter the criteria that you want to use to limit the results of your search and click **Find**. The Move Orders window is opened and a list of move orders that match your search criteria is displayed.

Please refer to the Viewing the Status of Move Orders topic from the *Spares Management Concepts and Procedures* for details.

3.12 Creating Move Orders

Move Orders are used to request transfers of parts between subinventories within the same inventory organization.

Use this procedure to open the Move Orders window.

Prerequisites

Spares Management is implemented. You may order only from a source subinventory which has an available quantity that is greater than or equal to the quantity you are trying to order. A move order can move parts only between subinventories within one inventory organization.

Steps

1. Navigate to the Field Service Report window.
2. From the Tools menu click **Create Move Order**.
3. If the Select Organizations window appears, select an inventory organization.
4. The Move Order window is opened.

   Please refer to the Creating a Move Order topic from the *Spares Management Concepts and Procedures* for details.

3.13 Viewing Onhand Quantity

You can view the on-hand quantity for items within a selected inventory organization.

Prerequisites

Spares Management is implemented.

Steps

1. Navigate to the Field Service Report window.
2. From the Tools menu click **View Onhand Quantity**. The Find On-hand Quantities window is opened.

3. Enter the criteria that you want to use to limit the results of your search and click **Find**. The Item On-hand Quantities window is opened and a list of items that match your search criteria with on-hand quantity is displayed.

3.14 Updating a Field Service Report

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

Prerequisites

You must first create a task.

Steps

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

Note: Once you have successfully updated Inventory, Charges, and Installed Base, you cannot modify these updated transaction lines. You can add new material, expense, or labor transaction lines to an existing Field Service Reports and update these new lines. Once the associated task is closed you cannot update the Field Service Report anymore.

3.15 Updating the Task Assignment Status

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

Prerequisites

None

Steps

1. Navigate to the Field Service Report window.

2. In the Assignment Status field, select the new task status from the list of values.
3. Click **Save**.

Guidelines

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