Oracle® Field Service/Laptop

Concepts and Procedures

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1 Understanding Field Service/Laptop

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

This topic includes the following:

- Introduction
- Overview
- Navigation path

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2 Introduction

The Field Service/Laptop is part of the integrated CRM Field Service suite. The Oracle Field Service suite allows customers to access actual and historic customer-related information at any point in the process. The Field Service/Laptop is a tool that helps field service representatives to do their jobs. All the tasks that they need to perform are shown and accessed through a calendar.

Together with the installed base, the Field Service/Laptop gives field service representatives a clear view of what is installed at the customer site. In this way they can see the impact and know what kind of materials are needed to solve the problem. This helps them to be able to fix the problem on the first visit.

The Field Service/Laptop also makes it easier to maintain the installed base. When a field service representative installs or removes a new product, the installed base is updated. This information can be very valuable when running reports to measure the reliability and maintainability of a hardware product or component.

Spares management is a critical process in field service. Spares are not only stored in the warehouse, but they also reside in the field service representative's truck. It is therefore crucial to know where spares are located and how soon they can be in the hands of the field service representative who needs them. The Field Service/Laptop allows the field service representative to:

- Oversee the inventory stocked in the car
- Manage spare parts
- Oversee defective parts that need to be sent back
- Solve errors caused by re-keying of information
- Speed up the billing cycle
- Maintain spares management and installed base
- Keep up with current information
- Print out service report for customers

Using the Field Service/Laptop, the field service representative can synchronize with the home office. This enables dispatchers, administrators, and the field service representatives to keep up with information such as:

- When is the field service representative scheduled to perform the task?
- Is the representative on time or do we need to reschedule?
- When will someone be available to perform a new task?

- Who is the cheapest person to send on site?
- Have the materials for a task been used or not?
- When can we bill the customer?
- When is the last time that we performed a task for this customer?

3 Overview

3.1 Setting Up Schedules and Responsibilities

The administrator can organize the Field Service/Laptop application in several ways, depending on how much control the field service representatives are to have over their own schedules. This section gives several examples showing different levels of control for the field service representatives.

3.1.1 Conform to the schedule

The field service representatives can only work on one job at a time, and in the order that the dispatcher plans. They cannot reschedule their tasks, but they can initiate a follow-up task or reject a task.

This setup gives the dispatcher control over the daily schedule of the field service representatives. The dispatcher sets up the tasks, including what time and where the field service representative is to be at all times.

3.1.2 Work on the schedule in any order

The field service representatives can only work on one job at a time, and they can work on the tasks scheduled for one day in any order. They cannot reschedule the tasks for another day.

This setup gives the field service representatives control over their own day. The dispatcher sends the tasks and locations to the field service representative, and the representatives decide when they want to perform each task. If a field service representative has a dental appointment, for example, he could arrange what time he wants to be at the customer site near his dentist. The field service representative is expected to complete all the tasks on the day they have been assigned. Tasks cannot be moved to another day.

3.1.3 Work in any order and update planned and scheduled tasks

The field service representative can only work on one job at a time, but they can work on tasks in any order. They can also reschedule the tasks for another day if necessary.

This setup lets the field service representatives themselves schedule when they do their tasks. This works well in an environment where each task requires only one field service representative.

If you often send more than one field service representative to perform a task, make sure you schedule only one task assignment at a time, because multiple task assignments can lead to conflicts.

Suppose you have a task that requires three field service representatives. You set up the task, and you send it to the calendars for all three representatives. It now appears on their calendars: BankAmerica, Monday morning, 9 to 11 a.m. However, suppose one of your field service representatives changes the time for his task to 1 to 3 p.m. That would affect the calendar of the other two representatives. To avoid this, you must set up the task itself, and then set up three different task assignments, one for each representative.

3.2 Connected and Disconnected Solutions

A field service can be automated with either a connected or a disconnected solution.

3.2.1 Connected Mobile Solution

A connected mobile solution must always be connected to the CRM database to exchange information. For this you need a supportive telecommunication network such as the Oracle Field Service / Wireless. Using the Field Service / Wireless application in addition to the Field Service / Laptop, you can, for example, send short messages to keep your dispatcher up to date as to your whereabouts or the status of the task. You can also quickly receive the information you need about the customer, installed base, and materials.

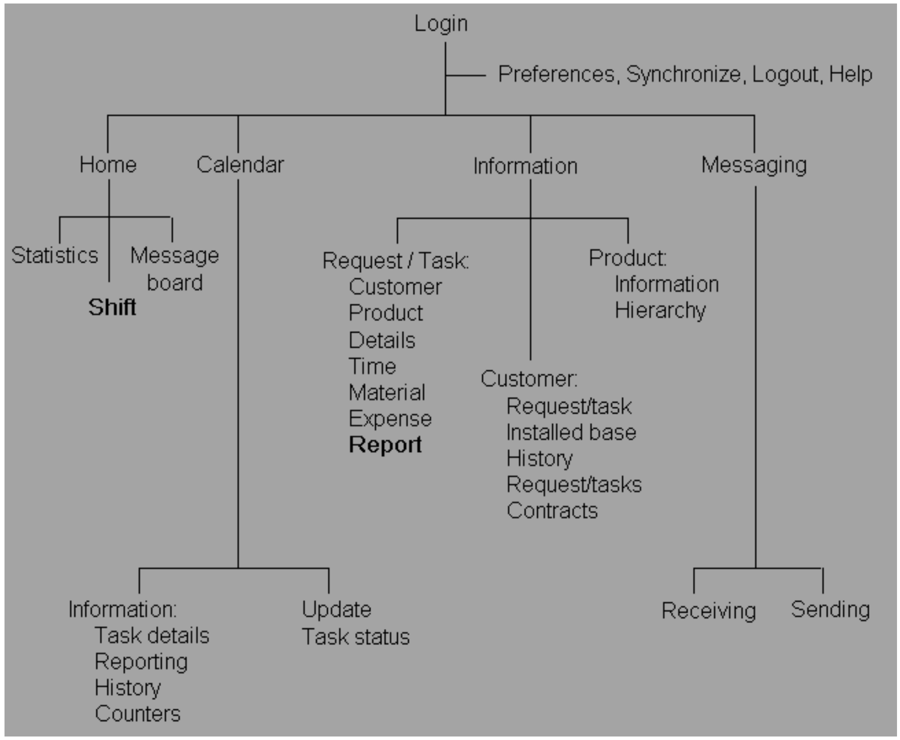
3.2.2 Disconnected Mobile Solution

A disconnected mobile solution needs a temporary connection to exchange (synchronize) information between the database and the mobile application. After this synchronization, the information is available without being connected to the database.

You can use the Field Service / Laptop and Oracle Field Service / Palm TM Devices for this.

4 Navigation Path

This diagram shows a high level structure of the Field Service / Laptop.



5 Using Field Service/Laptop

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

The following topics are included:

- Using the Home Page
- Viewing and Changing Your Calendar
- Using the Information Tab
- Messaging tab
- Preferences button

6 Using the Home Page

The **Home Page** is the welcome page that you see when you first start the application. It shows your tasks for the week, your daily shift, and an overview of new information on the Message board. Your Home Page is updated every time you synchronize with the main database. This section describes how to use the different components of the Home page, and it describes each of the following different areas:

- Statistics on tasks that reside on the laptop
- Working shift

6.1 Viewing Your Tasks for This Week

Use this procedure to view the tasks that have been assigned to you for this week.

Prerequisites

None

Steps

1. Navigate to the Home Page to view the Tasks This Week table. Your shift information is shown at the bottom of the screen.
2. Click on a value in the **Status** column to see the tasks that have that status, for example, Assigned or Closed.

6.2 Searching for Information Using the Quick Find Function

Use this procedure to search for information when you are on the Home page or the Calendar tab.

1. Choose the type of information you want to search for in the **Quick Find** field.
2. Enter the word or numbers to search for in the search field. Use the % wildcard to represent one or more other characters.
3. Click **Go** or the **Enter** button on the keyboard. The view changes to the Information tab, and the search results are displayed in an outline on the left of the screen.
4. If you want to narrow the search to more specific criteria, choose a value in the **Quick Find** field and click **Advanced Search**. Additional fields are displayed that correspond to the type of information you enter in the **Quick Find** field.

5. Fill in one or more fields and click **Search**. You can use the % wildcard to represent one or more other characters.

6.3 Synchronizing with the Field Service Database

The information on your laptop is the same as the information at the field service organization headquarters, until either you or someone at headquarters changes it. When that happens, the information you have on your laptop is different from what the dispatcher or anyone else sees. To make the two sets of information the same again, you must synchronize your laptop with the field service organization headquarters.

When you synchronize, the Oracle database looks at the information on both sides and determines which change is the most recent. Information is synchronized between your laptop and the database at the home office. In this way, dispatchers can send you your job information for the day, and you can send them information regarding a task such as the parts you have used and the amount of time the job took. Synchronizing also allows you to send and receive messages to other members of the field service organization.

Use this procedure to synchronize the information on your laptop with the information from the main Field Service computer database.

Prerequisites

None

Steps

1. Set up a telephone connection between your laptop and a telephone or a telephone outlet.
2. Click the **Synchronize** button at the upper right of your screen. The information on your laptop is synchronized with the information at the home office.

6.4 Logging Out

When you have finished working with the Field Service/Laptop, log out of the application.

Prerequisites

All data is saved and you are ready to exit the application.

Steps

1. Click the **Logout** button at the upper right of your screen.
2. The application checks that all data has been correctly saved, and closes. The computer returns to the Web-to-Go workspace.

7 Viewing and Changing Your Calendar

The Calendar tab shows your calendar with all of the scheduled tasks assigned to you. The calendar information gives you an immediate overview of the most important information regarding the tasks to be done.

7.1 Using the Calendar

The calendar shows scheduled task times and predicted task completion times, based on the job execution. Using the calendar, you can do the following:

- Navigate to the details of a selected task
- Change the status of a task
- Select a date in the future or past to see the calendar for that date

7.1.1 Prerequisites

None

7.1.2 Steps

Your calendar is your starting point each day for finding out which customers you are scheduled to visit and what tasks you will be performing there. Use this procedure to view the tasks on your calendar. You can use the Calendar as a starting point to get more information about the tasks shown.

1. Navigate to the Calendar tab.
2. By default, your calendar for the day with the first open task is shown. If you want to see the calendar for another date, use the date field in the upper right to change the date and click **Go**.
3. Click the service request number shown in the **Request** column to view the service request details. See Requesting Information About Service Requests for more information.
4. The **Scheduled** column shows the scheduled start time for each task.
5. The **Travel time** column shows the calculated or default travel time as calculated by the time / distance server.
6. The **Customer** column shows the name and address of the customer. Click the customer name to see more information about the customer.
7. A description of the task is shown in the **Task Name** column. Click the task name to see more information about the task.
8. Click on the **Product** column to see details about this product.

9. The **Status** column shows the task assignment status. To change the status, choose another predefined task status from the drop down list. Click **Update** to update your calendar.

8 Using the Information Tab

The Information tab is the central point for finding all the information about customer, service requests, and tasks. Whenever you request information from anywhere in the application, your request is linked to the Information tab.

You can use the Information tab to do the following:

- Find information about customers
- Find information about service requests
- Find information about tasks
- Report on tasks
- Find information about the installed base
- Print out service reports
- Find information on inventory and item list, and order parts

8.1 Requesting Information About Customers

Before you visit a customer site, you need to know the address and contact information, as well as historic information about what work has been done there in the past. Use this procedure to find and read information about customers and to add your own notes to a customer.

You can request customer data in these ways:

  - From the Information tab
  - From your daily calendar, if a visit to that customer is scheduled
  - Using the Quick Find function from the Calendar tab or Home Page

To use the daily calendar or the Quick Find function, see Viewing and Changing Your Calendar or Searching for Information Using the Quick Find Function. This topic describes how to use the Information tab to request customer information.

8.1.1 Prerequisites

None

8.1.2 Steps

1. To see information about customers other than those who have a visit currently scheduled, navigate to the Information tab.
2. Choose **Customer** in the **View** field.

3. Enter all or part of the customer name in the **Search** field. You can use the % wildcard to represent one or more other characters.
4. Click **Go**. The results are displayed in the outline on the left of the screen.
5. Click on the name of the customer to expand the outline to display details about this customer, including contact information.
6. Click the **Notes** button to view existing notes about a customer or to add new notes. The **Notes** screen displays any existing notes about this customer. The Note details show information including the date and author of the note, and the text of the note itself.
7. Click **Add note** to open a new screen and write a new note. Under Note details, specify the following:
    - Note type
    - Status
8. Enter the text of the note in the **Note** field.
9. Click **Cancel** to delete the note without saving it.
10. Click **Save** to save the note you have written. The next time you connect with the database, the note will be added.
11. If you want to narrow the search to more specific criteria, choose **Customer** in the **View** field and click **Advanced**. Additional fields are displayed that you can search on.
12. Fill in one or more fields and click **Search**. You can use the % wildcard to represent one or more other characters.

8.2 Requesting Information About Service Requests

The service request shows you the details you need to see including the problem, solution, and materials needed to complete a task. Use this procedure to find and read information about service requests and to add your own notes to a service request.

8.2.1 Prerequisites

None

8.2.2 Steps

1. Navigate to the Information tab.
2. Choose **Service Requests** in the **View** field.

3. Enter all or part of the service request name in the **Search** field. You can use the % wildcard to represent one or more other characters.
4. Click **Go**. The search results are displayed in the outline on the left of the screen.
5. Click on the name of a service request to display its details.
6. Click the **Notes** button to view existing notes about a service request or to add new notes. The Note details show information including the date and author of the note, and the text of the note itself.
7. Click **Add note** to open a new screen and write a new note. Under Note details, specify the following:
   - Source
   - Note type
   - Status
8. Enter the text of the note in the **Note** field.
9. If you want to narrow the search to more specific criteria, choose **Service request** in the **View** field and click **Advanced**. Additional fields are displayed that you can search on.
10. Fill in one or more fields and click **Search**. You can use the % wildcard to represent one or more other characters.

8.3 Requesting Information About Tasks

When a task is assigned to you, you need to be able to get information about it such as what the problem is and what parts and materials you will need. Use this procedure to find and read information about tasks and to add your own notes to a task.

You can request customer data in these ways:

- From the Information tab
- From your daily calendar, if a visit to that customer is scheduled
- Using the Quick Find function from the Calendar tab or Home Page

To use the daily calendar or the Quick Find function, see Viewing and Changing Your Calendar or Searching for Information Using the Quick Find Function. This topic describes how to use the Information tab to request customer information.

8.3.1 Prerequisites

None

8.3.2 Steps

1. To see information about any task, not just those that are scheduled, navigate to the Information tab.
2. Choose **Task** in the **View** field.
3. Enter all or part of the task name in the **Search** field. You can use the % wildcard to represent one or more other characters.
4. Click **Go**. The task search results are displayed in the outline on the left of the screen.
5. Click on the task name to view the details for this task.
6. The **Planned start** and **Planned end** fields show the time window according to the contract agreement. Depending on the business scenario your system administrator has chosen, you can enter the time that the visit will take place in the **Scheduled start** and **Scheduled end** fields.
7. Check the value in the **Status** field, and change it if necessary. If a field service representative needs to return to finish this task, choose the setting **Follow up task**.
8. Check the value in the **Planned effort** field. Depending on the business scenario your system administrator has implemented, you may or may not be able to change this value.
9. Check the value in the **Priority** field, and change it if necessary.
10. If you make changes to the task and want to save them, click the **Update** button.
11. Click the **Notes** button to view existing notes about a task or to add new notes. The Note details show information including the date and author of the note, and the text of the note itself.
12. Click **Add note** to open a new screen and write a new note. Under Note details, specify the following:
    - Source
    - Note type
    - Status
13. Enter the text of the note in the **Note** field.
14. If you want to narrow the search to more specific criteria, choose **Task** in the **View** field and click **Advanced**. Additional fields are displayed that you can search on.
15. Fill in one or more fields and click **Search**. You can use the % wildcard to represent one or more other characters.

8.4 Requesting Information About Inventories and Item Lists

Spares management is a critical process in field service. You need to know where the parts you need are located, and how soon you can get them. Use this procedure to find and read information about inventories and item lists.

8.4.1 Prerequisites

None

8.4.2 Steps

1. Navigate to the Information tab.
2. Choose **Inventories** in the **View** field.
3. Enter all or part of the inventory name in the **Search** field. You can use the % wildcard to represent one or more other characters.
4. Click **Go**. The inventory results are displayed in the outline on the left of the screen.
5. Click on the name of an inventory to display details about this inventory.
6. To order an item shown in the search results, click the **Select** column in the item row and click the **Order** button at the bottom right of the screen.
7. To transfer an item, click the **Select** column in the item row and click the **Transfer** button at the bottom right of the screen.
8. If you want to narrow the search to more specific criteria, choose **Inventory** in the **View** field and click **Advanced**. Additional fields are displayed that you can search on.
9. Fill in one or more fields and click **Search**. You can use the % wildcard to represent one or more other characters.

8.5 Time Reporting

When you have completed a task, you enter the information regarding how long the task took. Use this procedure to report on your time for a particular task.

8.5.1 Prerequisites

None

8.5.2 Steps

1. Choose the Information tab.
2. In the outline on the left, select the task for which you want to record the time.
3. Select **Time reporting**.
4. To enter the business process, select a value from the **Business Process ID** field.
5. To enter the labor type, select a value from the **Labor type** field.
6. To choose a description of the type of labor for this task, select a value from the **Labor item** field.
7. To enter the start time, select a time from the **Start time** field.
8. To enter the end time, select a time from the **End time** field.
9. Enter the mileage before you travelled to the customer site in the **Starting mileage** field.
10. Enter the mileage when you arrived at the customer site in the **Ending mileage** field.
11. Click **Save** to enter this record in the database, or click **Cancel**.
12. On the table under Added labor lines, you can see a summary of the labor lines that have already been reported.

8.6 Materials Reporting

When you have completed a task, you enter information regarding what materials you used. This tells the home office what needs to be replenished or replaced. Use this procedure to report on the materials used during a task.

8.6.1 Prerequisites

None

8.6.2 Steps

1. Choose the Information tab.
2. In the outline on the left, select the task for which you want to record the materials used.
3. Select **Material reporting**. A summary of the reported materials for this task appears.

4. To make a new material report, choose a value from the **Type of material move** field and from the **Business Process** field, and click **New**. The **Material Transaction** screen appears.
5. Enter the necessary information for either used or recovered parts. Click **Find** to search for the part, click **Save** to save the information, or click **Cancel**.
6. If you click **Find** to search on materials, you can search in:
   - Item list
   - Inventory
   - Installed Base
7. Enter values in one or more of the fields shown under Criteria.
8. If you want to clear the fields and start over, click **Clear**.
9. Click **Search** to start searching for the materials you specified. The search results appear.
10. To see more information about a part or material, click on the number in the **Item** column. Information appears including serial number, lot number, and when and where the part was installed.

8.7 Expenses Reporting

When you have completed a task, you want to enter your expense information. Use this procedure to report on the expenses incurred during a task.

8.7.1 Prerequisites

None

8.7.2 Steps

1. Choose the Information tab.
2. In the outline on the left, select the task for which you want to record the expenses.
3. Select **Expense reporting**. A summary of the expenses incurred for this task appears.
4. To make a new expense report, enter the following information under New Expense Line:
   - In the **Quantity** field, enter the number of parts, if applicable.
   - In the **Unit of Measure** field, enter the

- In the **Txn Billing Type ID**, enter the transaction billing identification number for tax purposes.
- In the **Expense Amount**, enter the amount of this expense.
- In the **Currency Code** field, check that the default currency is correct. If necessary, change it to the correct currency.

5. Click **Save** to enter this record in the database, or click **Cancel**.

8.8 Printing the Field Service Request Report

You can print out a document that summarizes all the information about time, material, and expenses for a service request. This is useful for leaving at the customer site, or for getting a signature.

8.8.1 Prerequisites

None

8.8.2 Steps

Use this procedure to print the Field Service Request Report.

1. Choose the Information tab.
2. In the outline on the left, select the service request for which you want to print a report.
3. Click **Field Service Request Report**. The summary appears, showing the Reported time, Reported material, and Reported expenses. The current date and space for a signature appear at the bottom of the report.
4. To print the report, click **Print** in your browser window.

8.9 Printing the Field Service Task Report

You can print out a document that summarizes all the information about time, material, and expenses for a task. This is useful for leaving at the customer site, or for getting a signature.

8.9.1 Prerequisites

None

8.9.2 Steps

Use this procedure to print the Field Service Task Report.

1. Choose the Information tab.

2. In the outline on the left, select the task for which you want to print a report.
3. Click **Field Service Task Report**. The summary appears, showing the Reported time, Reported material, and Reported expenses. The customer and task details are also shown. The current date and space for a signature appear at the bottom of the report.
4. To print the report, click **Print** in your browser window.

9 Messaging Tab

The Field Service/Laptop application makes it possible to send and receive messages to other people within your organization. This messaging function facilitates communication among field service employees. It can be set up to send messages among all CRM users, or among the members of one team.

You can use this tab to send or receive messages. You can use this to ask for support or additional information.

9.1 Reading Received Messages

After you synchronize with the main database, you can check to see if you have received any messages. Use this procedure to read messages that you have received, and to delete messages after you have read them.

9.1.1 Prerequisites

None

9.1.2 Steps

1. Choose the Messaging tab.
2. Click the **Received** subtab.
3. To read a message, click on its subject in the **Subject** column. This displays a detail screen showing the complete message. A blue icon next to the Subject indicates that the e-mail has an attachment.
4. To answer a message, click **Reply.** A new message with a blank **Message** field is displayed. The subject and recipient fields are already filled in.
5. To delete messages, check the **Select** column to the left of the message or messages you want to delete, and click **Delete selected**.

9.2 Writing and Sending New Messages

When you need information from one of the other members of the field service organization, you can ask for it by sending a message. Use this procedure to write and send your own messages to other people in your field service organization.

9.2.1 Prerequisites

None

9.2.2 Steps

Use this procedure to write and send your own messages to others.

1. Choose the Messaging tab.
2. Click the **New message** subtab.
3. Choose the recipient's name from the **To** field.
4. Enter a title or brief summary of the message in the **Subject** field.
5. Change the value in the **Priority** field, if necessary.
6. Enter the text of the message in the **Message** field. Messages can be up to 255 characters long.
7. Click **Send** when you have finished writing the message and are ready to send it.

9.3 Viewing Sent Messages

Sometimes you want to check that a message you wrote has actually been sent. Use this procedure to look at the messages you have already sent to other people in your field service organization.

9.3.1 Prerequisites

None

9.3.2 Steps

Use this procedure to view the messages you have sent to others.

1. Choose the Messaging tab.
2. Click the **Sent** subtab. The messages you have recently sent appear.
3. Click on the recipient's name in the **To** column to see the user IDs of the other mobile users. Choose the recipient's name.
4. Click on the message in the **Subject** column to see the text of the message that you sent.

10 Preferences Button

Click on the Preferences button to view your profile settings. Profile options are set by the system administrator at the home office.

The following table shows the profile options and what they mean.

Profile Option	Description
CSL: Conflict rule	Profile option for the Field Service/Laptop application to handle updates to the CRM database from the mobile devices. Options are: ■ **Client wins**. No timestamp checking is done, mobile record always overwrite record in CRM database. ■ **Timestamp**. When the last update date of the CRM record is greater then the last sync date (date when the mobile device originally got the record), the mobile record won't be applied to CRM. When the last update date of the CRM record is smaller or equal to the last sync date the mobile record will be applied to CRM.
CSL: Labor item in Laptop inventory	Not used.
CSL: Laptop inventory organization	All system items from the inventory organization are always replicated to the mobile client.
CSL: Notifications scope	Define where e-mail should be sent, using the following parameters: ■ **0** is All Oracle Mobile Field Service users ■ **2** is All the engineers in the group
CSL: Number of days before data is removed on the client	Define the number of days for data to remain on Field Service/Laptop without editing it. When the number of days has expired it is removed from the Field Service/Laptop by the CRM Gateway for Mobile Devices.
CSL: Replicate installed base product children	For future release.
CSL: Replicate installed base product parents	Define what information from the Installed Base you want to send to Field Service/Laptop: ■ **1** for just the product related to the Service Request. ■ **2** for the product related to the Service Request and the parent products. ■ **3** for the product related to the Service Request, the children, and parent products.

Profile Option	Description
CSL: Show address in calendar daily	Not used.

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