

Oracle® Field Service/Palm™ Devices

Implementation Guide

Release 11i

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1 Introduction

This section gives an overview of the complete Field Service process and highlights the Field Service/Palm™ Devices functionality.

1.1 Oracle Field Service Overview

The Field Service application assists in assigning tasks (a Service Request consists of at least one task) to service representatives, creating and dispatching daily schedules, and monitoring progress.

The process starts with the CRM 11i desktop, where, for example a call center agent logs a request or task. Next this task can be scheduled by a planner or dispatcher. Finally, information is sent out to the mobile application, either Field Service/Laptop or Field Service/Palm™ Devices, but not to both.

1.2 Field Service/Palm™ Devices Overview

Field Service/Palm™ Devices devices provide all the data that the Field Service representative needs to perform service tasks while she is away from the office. Oracle Field Service/Palm™ TM runs on hand-held devices running Palm OS. To be effective, the data residing on the Palm needs to be regularly updated with Oracle Field Service. Data the Field Service representative enters into the Palm device needs to be transferred to Oracle Field Service.

1.2.1 Summary of Process Overview

This section provides a summary of the Field Service process, from taking a call to making sure that the client's problem is resolved.

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- A field service request or task is created during intake.
- A planner or dispatcher picks the task up and schedules it to a field service engineer.
- The field service representative executes the job, and reports time, material and expenses.
- The reported information is processed (for example, installed base, spares management).
- Finally, depending on the contract, the customer receives an invoice.

2 Technology, Requirements, and Performance

This section gives an overview of the architecture and the minimum software and hardware requirements.

2.1 Architectural Overview

The mobile applications follow a three-tier architecture. The CRM Gateway for Mobile Devices acts as the interface between the CRM enterprise database and the client palm and laptop applications. It is the middle tier in this three-tier architecture:

- CRM Applications database
- CRM Gateway for Mobile Devices
- Mobile devices including: Oracle Field Service/Laptop, Oracle Field Service/Palm™ Devices, Oracle Field Sales/Laptop, and Oracle Field Sales/Palm™ Devices

This architecture allows for scalability and strategic deployment of the server for data load balancing. Gateway servers can be located in remote sales and service offices close to the mobile worker while the server communicates with the main enterprise database over a LAN or a WAN.

The CRM Gateway for Mobile Devices transfers changed information between your field device and Oracle Applications 11i.

2.2 Minimum Hardware Requirements

Hardware	Requirement
On Desktop PC (Gateway server):	
Computer	IBM-compatible, Pentium I or better
Hard Drive	50 MB free space
Monitor	256 color display
RAM	32 MB
Miscellaneous	<ul style="list-style-type: none">■ Serial Port, Internet connection■ Mouse or pointer device
On Palm Device:	
RAM	2 MB of available RAM
Hand held device	Supported is every hand held device that runs the Palm OS 3.5.

2.3 Minimum Software Requirements

Software	Requirement
On Desktop PC (Gateway server):	
Operating System	Windows NT 4.0 (Service Pack 5), Windows 95, Windows 98, Windows 2000, or Windows ME.
Palm Desktop	At least the HotSync Manager and Install Tool.
Browser	Microsoft Internet Explorer, version 5.5 or later This is the recommended browser.
On Palm Device:	
Operating System	OnlyPalm OS 3.5.

3 Dependency Requirements and Verification

This section gives an overview of the applications that must be implemented prior to implementing Field Service/Palm™ Devices.

3.1 Mandatory Dependencies

For the Field Service/Palm™ Devices application to function, the following must be implemented:

- Oracle Field Service
- Oracle CRM Gateway for Mobile Devices

3.2 Conditional Dependencies

The Field Service/Palm™ Devices has no conditional dependencies.

3.3 Installation and Dependency Verification

Make sure that all the components listed as mandatory dependencies are running correctly before you use the Field Service/Palm™ Devices.

Make sure to complete the installation tasks as described in the [Installation Tasks](#) chapter to be able to run the Field Service/Palm™ Devices application on the palm device.

When migrating from a previous release, perform the steps as described in the [Migration Tasks](#) chapter.

4 Migration Tasks

When upgrading from an earlier release to the 11.5.6 release of the Field Service/Palm™ Devices application, perform the following steps:

Step	Description
1.	Migrate the CRM Gateway for Mobile Devices as described in the <i>Oracle CRM Gateway for Mobile Devices Implementation Guide</i> .
2.	Install the Field Service/Palm™ Devices application as described in Chapter 5, Installation Tasks to upgrade the application and the Oracle Lite database. Perform the following steps: <ul style="list-style-type: none">▪ Step 1: Updating the MDG web-to-go Repository▪ Step 2: Downloading and Installing Oracle Lite Setup▪ Step 3: Performing a Hotsync to put Oracle Lite Components on the Palm device

5 Installation Tasks

Perform the following installation tasks to be able to run the Field Service/Palm™ Devices application on the palm device:

- [Oracle Field Service/Palm™ Devices Installation Overview](#)

5.1 Oracle Field Service/Palm™ Devices Installation Overview

An overview of the installation process, and location of installation is shown in the following diagram. Perform these steps in sequential order.

Steps	Performed At
Step 1: Updating the MDG web-to-go Repository	MDG
Step 2: Downloading and Installing Oracle Lite Setup	Client PC (MDG)
Step 3: Performing a Hotsync to put Oracle Lite Components on the Palm device	Client Palm
Step 4: Configuring Windows Remote Application Server (RAS)	Client PC (MDG)
Step 5: Creating a RAS User Account for the Palm Device	Client PC (MDG)
Step 6: Configuring the Palm Device	Client Palm
Step 7: Configuring and Executing the Oracle Lite msync on the Palm	Client Palm

Steps	Performed At
Step 8: Configuring the Oracle Field Service/Palm™ Devices Application	Client Palm

5.2 Step 1: Updating the MDG web-to-go Repository

The palm applications get copied by adpatch to an Enterprise directory \$HTML_TOP. First the applications need to be copied to the CRM Gateway for Mobile Devices Tier.

- Use the **CSFM.zip** file for Oracle Field Service/Palm™ Devices

Perform this step on the CRM Gateway for Mobile Devices Tier.

1. Open your default browser.
2. Download the CSFM.zip file into a temporary directory from the following URL:

```
http://<enterprise_server>:<port_number> /  
OA_HTML/download/csf/CSFM.zip
```

Note: Replace the <enterprise_server> and <port_number> variables with the correct values of the Applications 11i web server.

3. Go to the temporary directory and extract the CSFM.zip file.
4. Edit the CSFMPublish.bat file for Oracle Field Service/Palm™ Devices. Check that the username/password and host string are correct for your web-to-go server.
5. Run the CSFMPublish.bat file, to update the web-to-go repository.

5.3 Step 2: Downloading and Installing Oracle Lite Setup

This step is performed on the desktop. In this step you will download the mobile client from the CRM Gateway for Mobile Devices and install the Oracle Lite setup.

Prerequisites

Synchronization Server name for downloading.

Steps

1. Start your Web browser and connect to the Synchronization Server (Web-to-Go server) by typing the following URL:

`http://<server_name>/setup`

Note: Replace the <server_name> variable with the host name of the Synchronization Server.

The Oracle CRM client setup screen is opened with a section to download the Mobile Client or Palm and updates when available.

2. If you are using Netscape, choose a location to save the setup program and click **Save**. In Windows Explorer, double-click setup.exe from the chosen location to run the setup program.

If you are using Internet Explorer, choose the option **Save this file** and click **Save**. When downloading is completed, click **Open Folder** and run the setup program.

3. Once started, the setup program prompts you to provide an install directory. Choose a directory, for example, C:\orant, and click **OK**. The setup program downloads all the required components.
4. After you download the necessary files, the setup program prompts you to select a Palm user.

Note: If the Palm desktop is not installed, the setup program will prompt you to install it. Also, you will need to manually publish all .PRC files if they have not been published.

5. When you have installed the Palm desktop, the setup program informs you that the components are successfully installed and will be uploaded with the next hotsync.

5.4 Step 3: Performing a Hotsync to put Oracle Lite Components on the Palm device

Perform a Hotsync on the Palm to retrieve the application components.

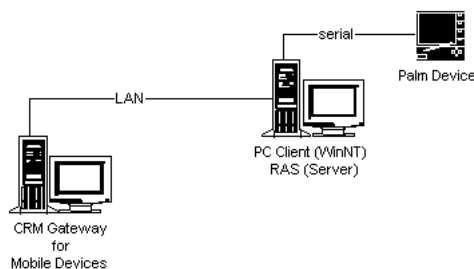
5.5 Step 4: Configuring Windows Remote Application Server (RAS)

Replicating with the Palm Computing Platform using Scout or HTTP requires the TCP/IP communication protocol. Palm uses serial lines for connection to the network. This step provides instructions for enabling TCP/IP communications for handheld devices using Windows NT RAS.

Perform this procedure to enable TCP/IP communications between handheld devices and your Windows NT server using Windows NT RAS.

The following two figures show the architecture that can be used by the Field Service representative to synchronize data between the Palm device and the CRM Gateway for Mobile Devices, at home or in the office.

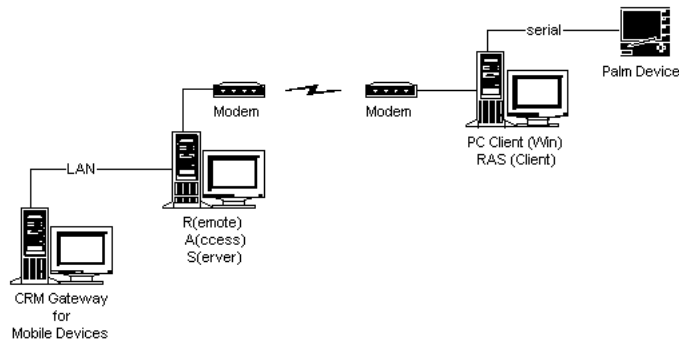
This first figure shows the most direct connection of a Palm device with the CRM Gateway for Mobile Devices.



This connection requires the following setup steps:

- Setting up a RAS Server as described in [Step 4: Configuring Windows Remote Application Server \(RAS\)](#) and [Step 5: Creating a RAS User Account for the Palm Device](#).
- Setting up the Palm Device as described in [Step 6: Configuring the Palm Device](#) (connected to a PC Client).

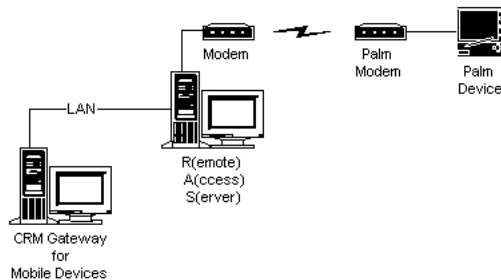
The second figure shows another possible connection.



This connection requires the following setup steps:

- Setting up a RAS Server as described in [Step 4: Configuring Windows Remote Application Server \(RAS\)](#) and [Step 5: Creating a RAS User Account for the Palm Device](#).
- Setting up the Palm Device as described in [Step 6a: Connected to a RAS Client](#).

Another way to connect the Palm device to the CRM Gateway for Mobile Devices is shown in the following figure. This is a valid setup when the Field Service Representative is on duty in the field.



This connection requires the following setup steps:

- Setting up the Palm Device as described in [Step 6b: Connected to a wired modem](#).

Prerequisites

Request an TCP/IP address range equal to the number of clients plus 1. Typically one Palm device is connected to the COM port, therefore the End address will be one number higher than the Start address.

You must make sure that the TCP/IP addresses are not already in use by other computers in your network

Steps

1. In the Windows Control panel, double-click the **Network** icon.
2. Click the **Add** button in the Services tab of the Network window.
3. Select Remote Access Service and then click the **OK** button.
4. Insert the Windows NT CD-ROM into the CD-ROM drive and specify the location where you want the setup program to search for existing Windows NT RAS files. Click the **Continue** button. The setup program copies the Windows NT RAS files into the appropriate directories. If the setup program fails to detect a modem, it prompts you to add a modem.
5. Click the **Yes** button and enter the required information to install a modem.

The Add RAS Device window appears.

6. Select COM1-Dial-Up Networking Serial Cable from the drop-down list.

If no COM1-Dial-Up Networking Cable option is available from the drop-down-list, perform the following steps to add it.

- a. Click **Install Modem**. The Install New Modem dialog window appears.
 - b. Check **Don't detect my modem**.
 - c. Select **Dial-Up Networking Serial Cable**.
 - d. Select the port on which the Palm device is connected.
 - e. Click **Next**.
 - f. Click **Finish** to leave the Install New Modem dialog window and return to the Add RAS Device window and select the option from the drop-down-list.
7. Click the **OK** button.
The Remote Access Setup window appears.
 8. Under Port, select COM1 and click the **Configure** button.
The Configure Port Usage window appears.
 9. Select the "Receive calls only" radio button and click the **OK** button.
 10. Click the **Network** button in the Remote Access Setup window.

The Network Configuration window appears.

11. Select TCP/IP and click the **OK** button.

The RAS Server TCP/IP Configuration window appears.

12. Select **Entire Network** and **Use Static Address Pool**.
13. Specify the requested range of TCP/IP addresses for multiple devices. Enter the beginning of the TCP/IP address range in the Begin field and enter the ending of the TCP/IP address range in the End field.

Example: If you have fifty devices, for example, you could define the following range:

Begin: 10.1.0.1
End: 10.1.0.51

Note: use the requested range of TCP/IP addresses compliant with your own network, do not use the example above.

14. Click the **OK** button.
15. In the Network Configuration window, select Any Authentication Including Clear Text, and click the **OK** button.

The Remote Access Setup window appears.

16. Click the **Continue** button.

The Setup Message window appears.

17. Click the **OK** button.

The Network window appears.

18. Click the **Close** button.

The Network Settings Change window appears.

19. Click **Yes** to restart the system.

When the system is restarted and you have logged in again, an error message might appear, saying that HotSync manager is unable to open COM1. Ignore this error message.

20. After the system reboots, click the **Services** icon in the Windows Control Panel.

The Services window appears.

21. Select Remote Access Server and click the **Startup** button.

22. Select Automatic and click the **OK** button.
23. Click the **Close** button.
24. Logon as a local administrator.
25. From the Windows Start menu select Administrative Tools and then select User Manager.

The User Manager window appears. Proceed to "[Step 5: Creating a RAS User Account for the Palm Device](#)".

5.6 Step 5: Creating a RAS User Account for the Palm Device

Continue with the procedure started in [Step 4: Configuring Windows Remote Application Server \(RAS\)](#) to create a RAS User Account to enable replication.

1. Log on locally to your own system, not to the network, as administrator.
2. Select New User from the User menu.
The New User window dialog appears.
3. Enter a user name, password, and password confirmation in the required fields.
4. Select Password Never Expires.
5. Click the **Dial-In** button.

The Dial-In Information dialog appears.

6. Select Grant Dial-In Permission to User. Click the **OK** button.
7. Click the **OK** button to exit the New User dialog.
8. Exit the User Manager screen.
9. From the Windows Start menu select Administrative Tools and then select Remote Access Administration.
The Remote Access Admin window appears.
10. Verify that the new RAS user is granted remote access permission and click the **OK** button.

5.7 Step 6: Configuring the Palm Device

If you are configuring the Palm Device connected to a RAS Client, follow the procedure described in [Step 6a: Connected to a RAS Client](#). If you are configuring the Palm Device connected to a wired modem, follow the procedure described in [Step 6b: Connected to a wired modem](#).

5.7.1 Step 6a: Connected to a RAS Client

To configure HTTP as the transport mechanism for Palm 3.5, use the following procedure:

1. In the Preferences screen of the Palm Computing Platform device, select **Connection** from the menu.

The Preferences screen appears.

2. Tap **New**.

The Edit screen appears.

3. Enter the following:

Field	Value
Name	HTTP
Connection Method	Serial to PC

4. Tap **OK** to close the Edit screen.

5. Tap **OK** to close the Preferences screen.

6. Select **Network** from the menu.

The Preferences screen appears.

7. Enter the required information in the fields of the Network Preferences screen:

Field	Value
Service	Windows RAS
User Name	The user's name
Password	The user's password
Connection	HTTP
	Note: Value entered at step 3 in Name field.
End	No information required

8. Tap the **Details** button.

The Details dialog appears.

9. Make sure that IP Address: Automatic is selected.

10. Tap the **Script** button.

The Log in Script dialog appears.

11. Enter the following:

Field	Value
Send CR	no information required
Delay	1
Send	CLIENT
Wait For	CLIENTSERVER
End	No information required

12. Tap the **OK** button to close the Log in Script dialog.

13. Tap the **OK** button again to close the Details dialog.

14. Place the device in the HotSync cradle.

15. Tap the **Connect** button to test the connection. If the PPP connection is successful, the device is ready for data synchronization.

5.7.2 Step 6b: Connected to a wired modem

1. Tap the Applications picker.

2. Tap Prefs.

3. In the Preferences screen of the Palm Computing Platform device, select **Modem** from the menu. The Preferences screen appears.

4. Verify that the Speed is set to 19200 bps.

5. Select Network from the Menu. The Preferences screen appears.

6. Enter the required values in the following fields:

Field	Value
Service	Windows NT RAS
User Name	The user's name
Password	The user's password
Phone	Telephone number of modem to dial

7. Tap the **Details** button.

The Details dialog appears.

8. Make sure that the Connection Type is set to PPP.

9. Make sure that the Query DNS is tapped.

10. If the Palm does not locate the correct database, enter the primary DNS and Secondary DNS of the RAS system.
11. Make sure that for IP Address: Automatic is selected.
12. Tap the **Script** button. The Log in Script dialog appears.
13. Enter the following:

Field	Value
Send CR	No information required
Delay	1
Send	CLIENT
Wait for	CLIENTSERVER
End	No information required

14. Tap the **OK** button to close the Log in Script dialog.
15. Tap the **OK** button again to close the Details dialog.
16. Place the device in the HotSync cradle.
17. Tap the **Connect** button to test the connection. If the PPP connection is successful, the device is ready for data synchronization.

5.8 Step 7: Configuring and Executing the Oracle Lite msync on the Palm

This procedure installs the Oracle Field Service/Palm™ Devices application and the database on the Palm Device. Use this procedure to configure the iConnect Consolidator client on the Palm Device.

Prerequisites

None

Steps

1. Start the iConnect Consolidator (consolidatorClient.prc) on the handheld device.
The iConnect Consolidator Sync screen appears.
2. Enter the following values in the fields:

Field	Value
User Name	iConnect Consolidator client user name. This must be written in uppercase.
Password	iConnect Consolidator client password. This field is case sensitive.
Change	Leave this check box unselected.
Save Password	Select this check box to save the iConnect Consolidator client password.
http://<machine.IP>/Consolidator	Enter the HTTP listener machine's IP address. The complete URL http://machine.IP/webtogo/Consolidator is not displayed on the device screen. It is not necessary to enter "/webtogo" after the machine IP address.
Use Proxy	Select if appropriate.

3. Tap the **Apply** button.

4. Tap the **Sync** button.

A progress bar indicates the completion of each synchronization task: composing, sending, receiving, and processing. If synchronization executes successfully, the synchronization Success screen appears.

If synchronization fails, an error message appears. To determine the cause of a failed synchronization, the server administrator can view tracing information on the Synchronization Server.

5.9 Step 8: Configuring the Oracle Field Service/Palm™ Devices Application

To establish communication with the Synchronization Server, configure the Field Service/Palm™ Devices application on the Mobile Device according to the following procedure.

1. Tap the **Applications** icon on the Palm device to display the application picker.
2. Tap the **Field Service** icon from the application launcher.

The first time the Oracle Field Service/Palm™ Devices application is started, the User Information screen opens automatically and displays the name of the user account on the CRM Gateway for Mobile Devices. If the user account name is not displayed, enter it.

3. Tap **OK**.

4. To modify this information tap **I**.

5. Tap **User**.

This completes the configuration of the Oracle Field Service/Palm™ Devices application, which is necessary to enable the communication with the Oracle Field Service server.

6 Implementation Overview of Field Service/Palm™ Devices

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

6.1 Process Description

Complete the following implementation steps in sequential order.

Step	Required	Step Title
1.	Yes	Confirm Setup Field Service
2.	Yes	Confirm Setup CRM Gateway for Mobile Devices
3.	Yes	Confirm setup of Field Service Report
4.	Yes	Setup Field Service/Palm™ Devices on the CRM Enterprise Database
5.	Yes	Setup Field Service/Palm™ Devices on the Palm Device

7 Overview of Implementation Tasks

7.1 Step 1: Confirm Setup of Field Service

Make sure Field Service is fully implemented and set up as described in *Implementing Field Service*.

7.2 Step 2: Confirm Setup of CRM Gateway for Mobile Devices

The CRM Gateway for Mobile Devices consists of a mobile client and a central application. It provides data transport between the Oracle CRM enterprise database and the Oracle mobile client database.

Make sure you set up the CRM Gateway for Mobile Devices as described in *Oracle CRM Gateway for Mobile Devices Implementation Guide*. Make sure that all the steps have been reviewed and completed as necessary and that you create mobile users.

7.3 Step 3: Confirm Setup of Field Service Report

Field Service Report is part of the Field Service application and is used to report all material, expense, and labor transactions. From the Field Service Report screen you update Inventory, Installed Base, and Charges.

When material, expense, and labor transactions are recorded on one of the Field Service/Mobile applications, such as Field Service/Palm™ Devices, all transactions are shown and updated to Inventory, Installed Base, and Charges from the Field Service Report.

Make sure Field Service Report is fully implemented and set up as described in the *Oracle Field Service Implementation Guide*.

7.4 Step 4: Setup Field Service/Palm™ Devices on the CRM Enterprise Database

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

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

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

Please refer to [Setting Up Field Service/Laptop and Field Service/Palm™ Devices on the CRM Enterprise Database](#) for details.

7.5 Step 5: Setup Field Service/Palm™ Devices on the Palm Device

On the Field Service/Palm™ Devices itself, set up the way you search for material.

Prerequisites

None.

Steps

1. Tap the **Applications** icon on the Palm device to display the application picker.
2. Tap the **Field Service** icon from the application launcher. The Field Service/Palm™ Devices application is started.
3. Tap the **Information** symbol and go to **User**.

Choose whether you want to search by:

- Name only
- Description only
- Name and description

8 Setting Up Field Service/Palm™ Devices on the CRM Enterprise Database

There is a combined set of setup screens to configure the Oracle Field Service/Laptop (up to and including version 11.5.5.) application and the Field Service/Palm™ Devices application. This is indicated on the setup screen with separate option possibilities. The screens and a description are listed in the table below. Clicking the setup screen name will take you to a task description of the setup screen.

Setup Screen	Laptop	Palm	Description
Agenda Layout	V		Change the agenda layout to your own preference by showing/hiding columns, rearranging the display of the columns, and change header names.
Configuration Parameters			Within Parameters you have five tabs:
<ul style="list-style-type: none"> ■ General tab 	V		To define display of progress clock.
<ul style="list-style-type: none"> ■ Agenda tab 	V	V	To define up to what point service representatives are allowed to make changes to their agenda, and to register car mileage.
<ul style="list-style-type: none"> ■ Parts tab 	V		To define part related options.
<ul style="list-style-type: none"> ■ SR Explorer tab 	V		To define service representatives right to edit or add tasks or service requests.
<ul style="list-style-type: none"> ■ Mail tab 	V	V	To define send mail options.
<ul style="list-style-type: none"> ■ Buttons tab 	V		To configure the Dashboard buttons
User Defined Queries	V		It is possible to create your own queries and add them to the standard Field Service/Mobile tables. These queries can be used in the Service Request Explorer, Views, and Field Service Report on the Field Service/Laptop to present information the way you would like it to appear.
Resources Subinventories Assignment	V	V	Used to relate resources to sub inventories.
Field Service Report Types	V		Define the name of the Field Service Report you want to create on the Laptop device.

Setup Screen	Laptop	Palm	Description
Field Service Report Manager	V		Used to customize the created Field Service Report types and decide which ones are presented on the service representative's laptop.

8.1 Setting up Configuration Parameters

Use this procedure to configure the Field Service/Palm™ Devices application.

Steps

1. Switch to the Field Service Administrator responsibility.
2. Navigate to **Field Service/Mobile > Configuration Parameters**.
3. Address the following tabs:
 - [Agenda](#)
 - [Mail](#)

Agenda tab

The agenda tab is used to define up to what point service representatives are allowed to make changes to their agenda, and to register car mileage.

Options

Perform the steps for setup described in the following table in any order.

Note: Step 8 and 9 also apply for the Field Service/Palm™ Devices application although this is not indicated on the window.

Step	Option	Description
1.	Show Field Service Report when service representative completes task	Select to open the Field Service Report window automatically when a service representative marks a task as completed.

Step	Option	Description
2.	Allow changes to a completed task	Select to enable the service representative to edit a task when task status has been marked as completed. When deselected this option can prevent conflicts with third party products that do not allow updates to completed tasks.
3.	Allow changes to Agenda's in past	Select to make service requests and tasks that were scheduled in the past reappear in the Agenda until the tasks are completed or canceled.
4.	Days to look back for not started tasks	Decide for how many days you want the not completed or canceled service request and tasks reappear in your agenda.
5.	Round-off time	Use this to round off the times that service representatives entered. The start time is rounded off to the nearest interval backward in time and the end time to the nearest interval forward in time.
6.	Agenda and mail refresh wait time	Specify the number of seconds the Agenda should wait before refreshing the screen. This can help with performance and speeding up the system.
7.	Mileage unit of measure	Must be set to match mileage system.
8.	Labor item	When the ignition key is turned on either the Laptop or Palm device, a start trip is created with the type selected from this list of values.
9.	Trip Billing Type	Choose a trip billing type for the start trip.
10.	register of car mileage: area	To prompt the service representative to register the car mileage on the specified actions: Start of day, Finish of day, Start of task, Finish of task.

Mail tab

The mail tab is used to define send message options.

Options

Perform the steps for setup described in the following table in any order.

Step	Option	Description
1.	Send mail: All OMFS users	Select to enable the service representative to send messages to all Field Service/Mobile users.
2.	Send mail: Service representatives in group	Select to enable the service representative to send messages to service representatives that are assigned to the same group.

Step	Option	Description
3.	Beep when service representative receives mail	Select to make a beep sound go off when a new message arrives at the service representatives mailbox.

8.2 Resources Subinventories Assignment

The resources to subinventories assignment window is used to relate field service representatives to subinventories. For now resources will be service representatives, in future other type of resources might be available. When entering a material transaction the subinventories for the service representative are shown.

Steps

1. Logon with the Field Service Administrator responsibility.
2. Navigate to **Spares Management > Resources Subinventories Assignment**.
3. Enter the following values into the fields, perform these steps in sequential order.

Note: When the setup screen is opened you will be prompted to select the code that applies for your organization. Make sure you choose the right organization code because you will not be able to change this once you have selected it.

Note: Updating a record results in the creation of a new record, re query to make the record visible. You cannot delete a record.

Step	Field	Value
1.	Organization: Code	This field is populated with the code that was selected at the prompt the setup screen was opened.
2.	Organization: Name	The name of the organization will automatically be populated once the code of the organization is selected.
3.	Resource Type	Select a resource type from the list of values.
4.	Resource	Select a service representative from the list of values.
5.	Subinventory	Select the subinventory you want to assign to the service representative.

Step	Field	Value
6.	Default	Select IN for good subinventory, OUT for bad subinventory and nothing for all other subinventories.
7.	Startdate	Select the start date for the assignment to be effective.
8.	Enddate	Select the end date for the assignment to be effective.

4. Click **Save**.

9 Profile Options for Field Service/Palm™ Devices

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

Prerequisites

None.

Steps

1. Switch to the System Administrator responsibility.
2. Navigate to **Profile > System**. The Find System Profile screen is opened.
3. At Profile enter CSF%.
4. Click **Find**.

You can set the profile options described in the following table in any sequence:

Profile Option	Description
CSF: History_M	Define the number of days that data is to remain on the Field Service/Palm™ Devices. When the number of days has expired, the data is removed from the Field Service/Palm™ Devices by the CRM Gateway for Mobile Devices.
CSF: InstalledBase Product_M	Define what information from the Installed Base you want to send to Field Service/Palm™ Devices: <ul style="list-style-type: none">■ 1 for just the product related to the Service Request.■ 2 for the product related to the Service Request and the parent products.
CSF: ConflictRule_M	This profile option handles updates to the CRM database from the mobile devices. The options are: <ul style="list-style-type: none">■ Client wins. No timestamp checking is done, the mobile record always overwrites the record in the CRM database.■ Timestamp. When the last update date of the CRM record is greater than the last synchronization date (the date when the mobile device originally got the record), the mobile record is not applied to CRM. When the last update date of the CRM record is smaller or equal to the last synchronization date, the mobile record is applied to CRM.
CSF: Palm Item Organization	All system items from the inventory organization are always replicated to the mobile client.

Profile Option	Description
CSF: Return Reason	Used to default a Return Reason on the Field Service Report window for a material line created. Select which one should be defaulted from the list of values. It's a mandatory field for Order Management. Especially use this profile option when working with one of the mobile applications.
CSF: Default Status Responsibility	Default state transitions responsibility for mobile field service users.
CSF: Allow overlapping labor lines	Allows creation of overlapping labor lines.
CSF: Conform to schedule	Defines whether the engineer must conform to the schedule or is allowed to do the tasks in any sequence

5. Click **Save** and close.

10 Verifying the Implementation

This section shows which tasks should be performed to verify that the implementation of Field Service/Palm™ Devices was successful.

10.1 Oracle Field Service/Palm™ Devices Implementation Verification Tasks

To verify whether the implementation of Field Service/Palm™ Devices has been successful, you need to check the complete flow using the following procedure:

- Synchronize the assigned task to the Palm
- Update the task in the Palm
- Synchronize the task back to the Palm

The following is a summary of the verification tasks.

1. In Oracle Applications, create a service request and a task associated to the service request. Make sure the task has type Dispatch.
2. Write down both service request and task numbers.
3. Assign the task to a field service representative, who has been set up as a mobile user with the Palm application on the Mobile Device Gateway. Make sure that the Commit Schedule program has run for this field service representative.
4. Wait for at least 10 minutes, which is how often replication to the CRM Mobile Device Gateway is done.
5. Perform a synchronization on the Palm. The task should appear in the Agenda.
6. Update the task, for example, by debriefing on used material, and perform another synchronization on the Palm.
7. Wait another 10 minutes and check the results in the main database. In this example, check the Field Service Report, Material tab.

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