

Oracle® Field Service/Palm™ Devices

Concepts and Procedures

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1 Understanding Oracle Field Service/Palm™ Devices

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:

- [About Field Service/Mobile](#)
- [Palm Device Application Flow](#)
- [Field Service/Palm™ Devices Features](#)

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2 About Field Service/Mobile

Oracle Field Service/Laptop and Oracle Field Service/Palm™ Devices are remote applications that work with Oracle Field Service. Oracle Field Service/Laptop and Oracle Field Service/Palm™ Devices let you access your field service information while on the road. You can work independently from the corporate network and then synchronize your changes back to the central database, either over a phone line, a LAN/WAN, or by wireless connection.

2.1 The Palm Device

Oracle Field Service/Palm™ Devices provides all the data you need on your hand-held devices running for Windows and UNIX to perform service tasks while away from the office. To be effective, the data residing on the Palm needs to be regularly updated with Oracle Field Service, and data that you entered into your Palm Device needs to be transferred to Oracle Field Service. This process of transferring data to and from your Palm Device is known as synchronization.

2.2 The Mobile Device Gateway

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. The CRM Gateway for Mobile Devices sends correct data to each field service representative. It transports only changed, new, or missing data because it knows what data resides on each device. The CRM Gateway for Mobile Devices also acts as the communication server. Based upon transaction priority it decides whether information needs to be sent wireless or if it can wait until manual synchronization. This is an economic way to manage wireless communication.

3 Palm Device Application Flow

- When new mail messages arrive, the mail notification icon is up. It is down when all the mail has been read. Reading and sending mail does not disturb the working process.
- The shortcut menu is disabled but shortcuts are available on your Palm Device when using the Oracle Field Service/Palm™ Devices application. A description of the shortcuts can be found in the Help User info screen.
- Data beaming is disabled when using the Oracle Field Service/Palm™ Devices application.

4 Field Service/Palm™ Devices Features

The Field Service/Palm™ Devices application provides the following features:

- [The Agenda](#)
- [Customer Info Features](#)
- [Managing Your Tasks](#)
- [Counters](#)
- [Reporting on a Task by Means of Debrief](#)

4.1 The Agenda

When you start the Field Service/Palm™ Devices application the first time the screen displayed is the Agenda screen with the service tasks for the current day. At a glance you see the schedule for the day and the status of the tasks dispatched to you.

Start your working day by tapping the Start trip icon to record your working hours. When you tap it, the icon text is changed into End trip. End your working day by tapping the End trip icon to record the time when you are finished working.

The Agenda screen displays the following:



The following table provides an explanation of all the items displayed in the Agenda screen:

Item	Description
Time	The current time is displayed.
Mailbox	The icon to the right of the time display is the Mailbox. This shows whether you have new or unread mail. You can tap the Mailbox to access it.
Information	Tap the Information icon to display information about the Field Service/Palm™ Devices application and to see some guidelines on how to use it.
Date	The date can be changed by tapping it. The agenda shows the tasks for the selected date.
Day	Day can be changed by tapping it, the agenda shows the tasks for the selected day.
Start Trip	The on-duty time is displayed as a Trip with a start and end time. Tap the Start trip icon to record your working hours.
Task line	The task line provides the following information: <ul style="list-style-type: none"> ▪ Severity, is set to 1, 2 or 3 (1=high). ▪ Status, the field is empty when the task is still open, displays an 'arrow' when working, a 'V' when the task is completed, a '!' when the task was interrupted, and an 'X' when it was canceled. ▪ Start time the planner scheduled the task to start. ▪ Service Request reference number. ▪ A short description of the task.
Note	Tap the note icon to display additional information related to the task. If the note icon is not dotted, you can use it to enter a note.
End trip	Tap the End trip icon to record the time when you are finished working.

4.2 Customer Info Features

The Customer Info screen gives you detailed information on the customer for the task selected. You can view the following:

Item	Description
Cust num	Reference number related to the customer.
Name	Customers name.
Contact	Name of the contact person.
Address	First line of the customer address. To see the full address and zip code, tap the letter icon.

Item	Description
City	City name.
State	State name.
Phone	Phone number of contact at customer.
Service Req	Service request reference number.
Service Req Note	Note displays information and is used to add notes.

4.3 Managing Your Tasks

A task is considered to be a unit of work. Tasks are created in relation to service requests. Service requests are created in the back office. A planning of all tasks is made and a schedule is sent to you by the dispatcher. Information regarding the work required for the task is sent along with this schedule. This information needs to be updated and checked. Use the task screen to view and update the following:

Item	Description
Task Nr	Task reference number.
Task	Description of work that needs to be done.
Status	Update status to enable the dispatcher to monitor progress on your working day. Possible statuses are user definable.
Priority	Priority given to task.
Product	Product name is displayed. Tap the icon to view detailed information on the product and installed base.
Serial nr	Serial number of product is shown.
Problem	Description of problem. Note: To update a problem description add a Service Req Note.
Solution	Description of solution. Note: To update a solution description add a Service Req Note.

You also need to report on labor time, materials used, and expenses made. Use the Debrief screen to do so, for more information see [Reporting on a Task by Means of Debrief](#).

4.4 Counters

A counter is an entity that records usage of a product. A lot of machines you are servicing contain one or multiple counters for all kinds of purposes. A selection of counters with their last reading for the machine you are servicing have been sent along with the task. Update or add a value for the counter after selecting it. Use Miscellaneous Reading to perform a test and Reset Counter to reset the counter, for example after a replacement of the counter.

A counter reading consists of the following:

- Name
- Time stamp
- Value
- Unit of measure

4.5 Reporting on a Task by Means of Debrief

You use the Debrief screen to view, add, and update on labor time, materials used, and expenses made for a specific task. This information needs to be accurate because the information is used to generate an invoice after the Palm device is synchronized with the Field Service database.

4.5.1 Reporting on Labor

Define the different types of labor you performed to complete a task. To report on labor, you select a labor type and associate it with an amount of labor time and an action. In the Set Labor screen define the following:

Item	Description
Start	Select a start date by using the calendar (Go to Date screen). Select a start time by using the hours and minutes bars on the right.
End	Select an end time by using the hours and minutes bars on the right. A date transition is indicated by an asterisk (*).
Process	Select a Labor business process from the drop-down list.
Transaction	Select a transaction type from the drop-down list. The transaction types are shown that relate to the business process you have chosen.

4.5.2 Reporting on Material

Report on all the materials involved during completion of the task. For each material, you report on the amount used and kind of action performed. After selecting a material in the Set Material screen define the following:

Item	Description
Qty	Enter the quantity for the selected material.
Uom	Associate an unit of measurement for the quantity entered.
Process	Select a Material business process from the drop-down list.
Transaction	Select a transaction type from the drop-down list. The transaction types are shown that relate to the business process you have chosen.
Serial Nr	If a serial number applies for the selected material the field is shown, the serial number should be entered.
Revision	The revision number is populated automatically.
Lotnumber	The lotnumber is populated automatically.

4.5.3 Reporting on Expenses

Define the different types of expenses you made to complete a task. Reporting on expenses is done by selecting an expense type, associating an amount of the expense type, and an amount of money involved. You define the following in the Set Expense screen:

Item	Description
Process	Select an Expense business process from the drop-down list.
Transaction	Select a transaction type from the drop-down list. The transaction types are shown that relate to the business process you have chosen.
Amount	Enter the amount of money for the currency selected.
Currency	Select the currency used.
Qty	Enter the quantity for the selected expense.
Uom	Associate an unit of measurement for the quantity entered.

5 Using Oracle Field Service/Palm™ Devices

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

Topics covered are:

- [Synchronizing the Palm Device](#)
- [Working with the Oracle Field Service/Palm™ Devices](#)

6 Synchronizing the Palm Device

Before you start the Field Service/Palm™ Devices application, you must synchronize to obtain your service tasks from the Oracle Field Service database. You must frequently synchronize your Palm Device with Oracle Field Service to make your updated information available to others and to keep your Palm up to date. Use this procedure to manually synchronize your Palm Device service data with Oracle Field Service through the CRM Gateway for Mobile Devices.

Prerequisites

Each Palm user must be assigned an account on the Mobile Device Gateway before data can be synchronized.

Refer to the CRM Gateway for Mobile Devices User's Guide for more information also see [About Field Service/Mobile](#).

Steps

1. Tap the **Applications** icon on the Palm Device to display the application picker.
2. Tap the **OL Sync** icon from the application launcher.
3. Tap **Sync**.

7 Working with the Oracle Field Service/Palm™ Devices

There are some general guidelines on how to handle the service tasks with your Palm Device.

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. A startup screen with the service representatives name is displayed briefly. Then the Agenda screen appears.
3. Tap the **Start trip**. Your working hours are recorded and stored. A trip start time entry appears at the top of the tasks.
4. Tap the first open task line. The Customer Info screen appears. View dispatcher notes when available or add them at **Service req**.
5. Tap **Task** to open the Task screen.
6. Update the status of the task by selecting an option from the dropdown list.
7. View details of the component you are working on at **Product**.
8. View problem and solution.
9. Tap **Counter** to open the Counter screen.
10. Update the reading by tapping it.
11. Add a reading for a counter by tapping **Add**.
12. Tap **Debrief** to open the Debrief screen. Report on labor time, materials used, and your expenses as necessary.
13. Tap **Task** to return to the Task screen. Update the status of the task by selecting an option from the dropdown list.
14. Return to the Agenda by tapping **Agenda**. Open another task if necessary
15. At the end of the day, tap the **End trip**. The trip end time is automatically filled in.

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