

Oracle® Mobile Field Service

Implementation Guide for Laptops

Release 11*i* (11.5.9)

Part No. A97696-04

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Describes how to implement and administer the Oracle Mobile Field Service/Laptop application. The application is commonly known as "Field Service/Laptop."

Oracle Mobile Field Service Implementation Guide for Laptops, Release 11i (11.5.9)

Part No. A97696-04

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Preface

Welcome to the *Oracle Mobile Field Service Implementation Guide for Laptops*. Please note that Oracle Mobile Field Service can be deployed on both laptops and Palm handhelds. This manual is intended to help you successfully implement and administer **Oracle Mobile Field Service/Laptop**, the laptop-specific edition of Oracle Mobile Field Service. Separate documentation is available if you are interested in implementing Oracle Mobile Field Service on Palm handhelds.

Intended Audience

This guide has been composed specifically for implementation engineers, system administrators, and any other administrator-level users who are required to set up or administer Oracle Mobile Field Service/Laptop.

Documentation Accessibility

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Related Documents

Below is a list of the other documents that are referenced in or related to this guide:

- *Oracle Mobile Application Foundation Implementation and Administration Guide*
- *Installing Oracle Applications*
- *Oracle9i Lite Installation and Configuration Guide*
- *Oracle Applications CRM System Administrator's Guide*
- *Oracle Mobile Field Service User Guide for Laptops*
- *Oracle Mobile Field Service Implementation Guide for Palm Handhelds*
- *Oracle Mobile Field Service User Guide for Palm Handhelds*

Introduction

Oracle Mobile Field Service/Laptop (often called "Field Service/Laptop") is an application that supports field service representatives in performing complex service activities. It converts a laptop PC into an engineer's workbench that fully integrates with the automated field service process. Enabling field personnel to work and report on assigned activities, view and update the customer installed base, print service reports, and more, it constitutes a complete job management system for the field worker.

1.1 New in this Release

For information about new and changed features as well as patch application instructions, please see *OracleMetaLink* Note 234251.1.

1.2 Integration with Other CRM Modules

The Oracle Mobile Field Service/Laptop application integrates with the following CRM modules:

- **Field Service Dispatch Center:** Together with Oracle Mobile Field Service/Laptop, a user can exchange task statuses, receive assigned tasks, and create new tasks on the mobile device.
- **Scheduler**
- **Spares Management/Inventory:** Together with Oracle Mobile Field Service/Laptop, a user can maintain the field service representative's truck stock, order or transfer items on the mobile application, and search through subinventories.
- **Field Service Report**

- Oracle Common Application Components such as **Task Manager**, **Territories**, and **Resource Manager**

1.3 Migration

If you are updating from an earlier release of Oracle Mobile Field Service/Laptop to release 11.5.9, please refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide* for information on how to migrate your existing mobile application.

Release 11.5.8 marked the introduction of the Oracle Mobile Application Foundation, which replaces the CRM Gateway for Mobile Devices used in previous releases. Beginning with release 11.5.8, Oracle Mobile Field Service/Laptop and Oracle Mobile Field Service/Palm use the new Oracle Mobile Application Foundation.

11.5.8 and later releases of Oracle Mobile Field Service/Laptop or Oracle Mobile Field Service/Palm are not compatible with the pre-11.5.8 Oracle CRM Gateway for Mobile Devices infrastructure. You must upgrade the applications and foundation at the same time.

Software and Hardware Requirements

This chapter describes the minimum software and hardware requirements of the Oracle Mobile Field Service/Laptop application.

2.1 Minimum Software Requirements

Enterprise Server

Please refer to *Installing Oracle Applications* for the overall software requirements of the E-Business Suite. Also, refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide*.

Laptop Client

Please refer to [Appendix A, "Installing the Laptop Application."](#) Also, refer to the appropriate platform-specific version of the *Oracle9i Lite Installation and Configuration Guide* for the software requirements of the laptop devices.

2.2 Minimum Hardware Requirements

Enterprise Server

Please refer to *Installing Oracle Applications* for overall hardware requirements for the E-Business Suite. Also, refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide*.

Laptop Client

Please refer to [Appendix A, "Installing the Laptop Application."](#) Also, refer to the appropriate platform-specific version of the *Oracle9i Lite Installation and Configuration Guide* for the hardware requirements of the laptop devices.

Dependencies

3.1 Dependencies

For information on the dependencies and installation procedures for this release of Oracle Mobile Field Service/Laptop, please see Oracle*MetaLink* Note 234251.1.

Implementation Tasks

This chapter contains instructions for the following implementation tasks:

- Section 4.1, "Confirming Required Enterprise Setups"
- Section 4.2, "Setting Profile Options"
- Section 4.3, "Scheduling Concurrent Programs"
- Section 4.4, "Publishing the Application"

4.1 Confirming Required Enterprise Setups

This section describes the enterprise-side setup procedures that are required for certain features to work correctly on a mobile laptop.

4.1.1 Setting Up Service Request

The following table lists the setups for Service Request that must be performed in order to create, view, and update Service Requests in Oracle Mobile Field Service/Laptop.

Component	Required or Optional
Service Request Statuses	Required
Service Request Severities	Required
Service Request Types	Required
Service Request Urgencies	Optional
Problem Codes	Optional
Resolution Codes	Optional

Component	Required or Optional
Service Request Templates	Optional

Linking Service Request Statuses to Service Request Types

Service Request Statuses have to be linked to Service Request Types. Use the following procedure:

1. Switch to the responsibility **Field Service Manager**.
2. Navigate to **Field Service Setup > Service Requests > Request Types**.
3. Click to select a Service Request Type from the table.
4. Click the **Related Statuses** button. In the form, link Service Request Statuses to the Service Request Type.
5. Click **Save** to save your work.
6. To finish, close the form.

For more information, please refer to the *Oracle Support Implementation Guide*.

4.1.2 Setting Up Tasks

The following table lists the setups for Tasks that must be performed in order to create tasks and personal tasks in Oracle Mobile Field Service/Laptop.

Component	Required / Optional
Task Statuses	Required
Task Status Transitions	Required. See Appendix E, "Setting Up State Transitions" for instructions.
Task Types	Required
Task Priorities	Required

Set up the required components listed above. For details, please refer to the *Oracle Field Service Implementation Guide* for these Field Service-specific setups.

Please note the following:

- The task types that can be selected during personal task creation are of type "Private". (To set Private types, check the Private flag during task type setup.)

- The task statuses that can be selected during personal task creation are those that are defined as the initial statuses for the user's responsibility.
- The task status that is selected during service task creation is from the Oracle Field Service profile: "CSF: Default In Planning Status". This cannot be changed by the end user.
- When a service task is created, a task assignment is not automatically created. When a personal task is created, a task assignment is automatically created and assigned to whomever created it.

4.1.3 Setting Up Oracle Field Service Report

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

When material, expense, and labor transactions are recorded on one of the Oracle Mobile Field Service applications, all transactions are shown and updated to Inventory, Install Base, and Charges from the Oracle Field Service Report.

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

For information on setting up debrief material reporting, please refer to Appendix B, "Setting Up Debrief Material Reporting."

4.1.4 Setting Up Spares Management

To implement the orders and transfers of spare parts in Oracle Mobile Field Service/Laptop, follow the instructions in [Appendix D, "Spares Management on the Laptop."](#)

4.1.5 Setting Up Install Base

This procedure is only required if you are using Install Base. If so, Install Base should be set up to support Install Base updates when doing Material Transactions on the laptop application. This should be set up after performing of the setup steps necessary for Debrief Material Reporting.

Oracle Mobile Field Service/Laptop supports two scenarios that affect Install Base:

- Removing a part
- Installing a new part

The following are the steps needed to support Install Base.

- Setting up System Items for Install Base Transactions
- Setting up Install Base Profile Options
- Removing and Installing Parts in Oracle Mobile Field Service/Laptop

Please refer to [Appendix C, "Setting Up for Install Base Transactions"](#) for instructions.

4.1.6 Setting Up Counters

This procedure is only required if you are using Install Base. The following table lists the setups for Counters which must be performed in order to report counter readings in Oracle Mobile Field Service/Laptop.

Component	Required / Optional
Counters	Required
Counter Groups	Required
Counter Properties	Required
Miscellaneous Reading Types	Required

For more information, please refer to the *Oracle Service Implementation Guide*.

Note: Only counters of type REGULAR are supported by Oracle Mobile Field Service/Laptop. Both Counter Values and Counter Property values can be entered in Oracle Mobile Field Service/Laptop.

4.1.7 Setting Up Messaging

Confirm that Messaging has been installed and implemented.

4.1.8 Setting Up Flexfields for Oracle Mobile Field Service/Laptop

This procedure is only required if you are using flexfields. Flexfields are customizable fields which have to be defined in Oracle Applications before they can be used in the laptop application.

There are two types of flexfields:

- Key Flexfields
- Descriptive Flexfields

Key flexfields are predefined, built-in flexfields that come with Oracle Applications.

Descriptive flexfields are flexfields that can be defined and used in Oracle Mobile Field Service/Laptop.

The following table lists the components for which Oracle Mobile Field Service/Laptop supports flexfields:

Component	On the Laptop, Flexfields are . . .
Customer	Read-only
Install Base	Read-only
System Item	Read-only
Field Service Request	Updateable
Field Service Task	Updateable

A maximum of 15 flexfields per component is supported. Please refer to Appendix F, "Setting Up Descriptive Flexfields," to set up these descriptive flexfields.

4.2 Setting Profile Options

4.2.1 Setting the Schedules and Responsibilities of Field Service Representatives

The administrator can organize the Oracle Mobile Field Service/Laptop application in several different ways, depending on how much control a field service representative is given over his schedule. This section describes several different levels of control for the field service representative.

Conform to the Schedule

The field service representative can only work on one job at a time, and is given a schedule that the dispatcher plans. For instance, the following tasks may be assigned to a field service representative:

- **Task 1:** 8:00 Installation at Customer A
- **Task 2:** 9:00 Repair on-site at Customer B

- **Task 3:** 10:00 Installation at Customer C

The field service representative first needs to finish task 1 before going on to task 2. He needs to follow the pre-defined order of the dispatcher. The field service representative cannot reschedule tasks, but can reject a task.

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

Order of Task Completion

If you send more than one field service representative to perform a task, make sure that you schedule only one task assignment at a time, because multiple task assignments can lead to conflicts. For example, suppose you have a task that requires three field service representatives. You set up the task and then you send it to the agendas of all three representatives. It now appears on their agendas.

However, if one of your field service representatives changes the time for his task, that would affect the agenda of the other two representatives. To avoid this, you must create three tasks, one for each representative.

The service representative can complete his scheduled tasks under different scenarios.

- **Scenario 1:** Complete Scheduled Tasks in Pre-determined Order

In this scenario, the field service representative works on one job at a time and conforms to the dispatched schedule.

- **Scenario 2:** Complete One Scheduled Task at a Time in Any Order

In this scenario, the field service representative works on a single job at a time and does not conform to the dispatched schedule.

- **Scenario 3:** Complete Multiple Scheduled Tasks in Any Order

In this scenario, the field service representative works on multiple jobs at a time and does not conform to the dispatched schedule.

Scenario 2 and Scenario 3 gives the field service representative control over his day. The dispatcher sends the tasks and locations to the field service representative, and the service representative then decides when to perform each task. This scenario works well in an environment where each task requires only one field service representative. For example, if a field service representative has a dental appointment, he can arrange the 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 were assigned. If he is unable to complete a scheduled task, he can reject it and then the dispatcher will re-schedule the task for the next day.

4.2.2 Overview of New Features

This section describes new application features and the new profile options that they introduce.

4.2.2.1 Concurrent Program Scheduling

Concurrent program scheduling is categorized for the Lookup, Transaction, and Inventory categories.

Formerly, all concurrent applications were registered with one JTM concurrent application, MOBILE_CON_PROGRAM. Now JTM has a new concurrent application, JTM Master Concurrent Program, which accepts the Lookup, Transaction, and Inventory categories as parameters. Now, concurrent applications are categorized for the Lookup, Transaction, and Inventory categories.

4.2.2.2 Category Set for System Item

A field service organization can have a large number of system items related to an inventory organization. However, field service representatives only use a portion of these items. To improve synchronization performance and to reduce the size of the downloaded data set, you can filter the system by category before downloading the data set to the field service representative. In order to do this, you need to set the following profiles:

- CSL_ITEM_CATEGORY_FILTER
Use to filter item categories
- CSL_ITEM_CATEGORY_SET_FILTER
Use to filter item category sets

These two profiles enable you to setup category sets (profile 1) and relate categories to this (profile 2). The category set and category profile make the unique key for replication. The values that can be selected for the category set profile are all categories sets of the master organization and the inventory organizations.

The following are the rules governing the use of category profiles.

- If the category profile is not set (no category is entered), then all items related to the default inventory organization are replicated to the mobile clients

- If the category profile is set (category is entered), then the system items replicated are filtered based in inventory organization and category.
- Items used in a service request created on the backend will not be impacted by this profile. But for service requests that the field service representative wants to create on a mobile device the category profile will limit the list of items available.
- The category profile does not affect the OnHandQty (stock in subinventory).

Items used in a field service report debrief are replicated as normal. This is independent of the category profile.

4.2.2.3 Service History

Oracle Mobile Field Service/Laptop displays service history for closed or completed service requests, detailing any installed base item and customer information.

Only closed service requests are downloaded with service history. Service history information is read-only. Field service representatives need to go to the SR Details screen to view any service history. If the service request is based on the install base product, then the service history for the install base product is available to view. Otherwise, for that customer on customer location, history will be displayed.

The amount of service history available for a service request depends on the value set in the "Number of Historic Service Requests" profile. This value is the number of history requests that need to be replicated if available. When the "Number of Historic Service Requests" profile is set to zero no history needs to be replicated.

The history records can be gathered synchronously when the service request becomes replicable or needs to be deleted. This behavior can be set with the "Synchronous Service History Collection" profile. By default, history-gathering is synchronous but if this process requires too much performance, the customer can choose to do this asynchronously.

The following data is replicated for a service history record:

- Closed or completed service request
- Primary contact of this closed service request
- Product or item of the service request excluding parent and child records
- Closed tasks of this service request
- Closed task assignments of these tasks (role = assignee)

- Resources of these task assignments
- Debrief lines belonging these task assignments

The following profiles are used to create a service history:

- JTM: Number of Previously closed Service Requests
Default is zero. It is recommended that you send down three to five service requests. Do not set very high values because of Palm handheld limitations on data set size.
- JTM: Synchronous History Collected
The default is NO. Value is YES or NO.

4.2.2.4 Flexfield Support

Descriptive flexfields provide customization capabilities in Oracle Mobile Field Service/Laptop. This satisfies various user needs without having to reprogram the application. For example, the Oracle Mobile Field Service/Laptop application keeps track of customers and customers table schema and common UI normally include fields such as Name, Address, State, Customer Number, and so on. However, the UI/ table columns do not include customer clothing size and color preferences. A company using our application happens to desire the capture the information of clothing size and color preferences. This can be resolved by adding a descriptive flexfield so that users have the desired expansion space.

Users can also take advantage of the fact that descriptive flexfields can be context-sensitive, where the information your application stores depends on other values your users enter in other parts of the form.

The following are the flexfield features:

- Descriptive flexfield support only
- Five descriptive flexfields are supported:
 - Customer flexfields for table HZ_PARTIES
 - Service Request flexfields for CS_INCIDENTS_ALL_B
 - Tasks flexfields for JTF_TASKS_B
 - Installed Base flexfields for table CSI_ITEM_INSTANCES
 - System Items flexfields for table MTL_SYSTEM_ITEMS_B
- For flexfields of tasks and service request, EDITABLE flexfields are supported

- For the other three flexfields, READONLY are supported
- Field service representatives can access the flexfield screen through the Customer, SR (Service Request) Details, Task, and Product Information screens. The flexfield screen will be dynamically generated according to the DFF definitions.

4.2.2.5 Customer and Install Base Notes

Customer notes and install base item notes provide the field service representative with additional information about the customer, and any earlier work performed on that customer product. These notes can be written by the home office or out in the field by the field service representative. This note information helps the home office and field service representative to stay current on customer details.

4.2.2.6 Service Contracts

Contract entitlements are downloaded from the contracts module to the laptop. On the laptop, the field service representative can view all the customer entitlements, as described by their service agreement. Entitlement information includes such details as contract number, service name, service description, and billing information.

4.2.3 Setting Profile Options for Oracle Mobile Field Service/Laptop

Set the profile options listed in the following table. The table indicates the profile option name, a brief description, and the options available.

Profile Option	Description	Options
JTM: Mobile Applications Enabled	Set the profile at the Field Service Laptop responsibility level to Y . Only after setting the profile value can hooks/business events be enabled.	Yes or No

Profile Option	Description	Options
JTM: Application Conflict Rule	Enables the Field Service/Laptop application to handle updates to the database from the mobile devices.	Client wins: changes made by the mobile user are always applied to the enterprise database. No timestamp checking is done. Timestamp: changes made by the mobile user are applied to the enterprise database if the record has not been modified since the mobile user last synchronized. If the record has been modified in the meanwhile, then the mobile user's change is not applied and becomes a deferred transaction.
JTM: Number of previously closed service requests	Defines the number of previously closed service requests to be replicated.	Use 0 to disable the history functionality.
JTM: Synchronous service history collection	Sets how previously closed service requests are collected (performance is a factor).	Yes for synchronous history collection. No for asynchronous history collection.
JTM : Enable credit card functionality	Hides credit card information by means of a profile.	Yes or No .
CSL: Laptop inventory organization	All system items from the inventory organization are replicated to the mobile client.	The values are the organization codes of the inventory organizations (called "organization name" during profile setup).
CSL: Notifications scope	Defines to whom messages can be sent	0 is all Oracle Mobile Field Service users; 2 is all the field service representatives in the group
CSL: Number of days before data is removed on the client	Defines the number of days for data to remain on Field Service/Laptop after it is last edited. When the number of days has expired, it is removed from the Field Service/Laptop.	Number of days before data is removed on the client

Profile Option	Description	Options
CSL: Replicate install base product children	Define what information from the Install Base you want to send to Field Service/Laptop:	Yes or No. For more information, please see the Note below.
CSL: Replicate install base product parents	Define what information from the Install Base you want to send to Field Service/Laptop:	Yes or No. For more information, please see the Note below.
CSL: Allow long notes	Determines if it is allowed to enter notes longer than 2000 characters.	Yes: to allow long notes; note that the maximum character count is 2000. With this profile switched on, an engineer can type in longer notes which after being saved are split into multiple notes. These multiple notes are replicated to the backend.
CSF: Update planned/scheduled times allowed	Specifies whether field service representatives are allowed to change the planned or scheduled times of the tasks they have received on the laptop device.	Yes or No
CSF: Conform to schedule	Specifies whether the field service representative must conform to the schedule or is allowed to do the tasks in any sequence on his or her laptop or Palm device. For details, please see section titled "Choosing the Field Service Business Process."	Yes or No

Note: Changing the installed base replication profiles takes effect as soon as the value is changed. No retroactive changes are made based on the profile values.

4.3 Scheduling Concurrent Programs

Schedule the concurrent programs listed in the following table for the Oracle Mobile Field Service/Laptop. For instructions on how to set up concurrent programs, refer to the *Oracle Applications System Administrator's Guide*.

Name	Description	Default (Recommended) Schedule
PROCESSES UPLOADED MOBILE DATA	Processes uploaded mobile data and applies it to the enterprise system.	Every 30 seconds.
MANAGE MOBILE USERS	Creates or removes mobile users automatically based on assigned mobile responsibilities.	Every 1 hour.
JTM MASTER CONCURRENT PROGRAM	The JTM master concurrent program, which runs all concurrent jobs registered by mobile applications.	TRANSACTION: every 5 mins. LOOKUP: every 30 mins. INVENTORY: once a day. PURGE: as often as required. Default is set to once per month.

4.4 Publishing the Application

Please refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide* for information on how to publish mobile applications.

The command for Oracle Mobile Field Service/Laptop would be:

```
java -DJTFDBCFILE=<DBC FILE PATH> -DAFLOG_ENABLED=TRUE
-DAFLOG_LEVEL=STATEMENT oracle.apps.asg.setup.InstallationMgr <DB_HOSTNAME> <DB_
PORTNUM> <ORACLE_SID> <APPS_USER_NAME> <APPS_PASSWD> CSL_TOP CSL/CSL.ini
html/download/csl.zip
```

Verifying the Implementation

This chapter describes the diagnostic tests that you should run to confirm that your setup and implementation has been successful.

5.1 Testing the Oracle Mobile Application Foundation

To verify the setup and implementation of the Oracle Mobile Application Foundation, run the following diagnostic tests which are delivered out-of-the-box:

- **Check Profiles:** This test checks if the profiles needed for replication have valid values.
- **User hook status:** This test checks if all user hooks are available.

For information on how to use Oracle Diagnostics to run tests, please refer to the *Oracle Applications CRM System Administrator's Guide*.

5.2 Testing the Laptop Application

Perform the following tasks to verify that the implementation of the product was successful:

1. Create a test user and assign them the "Field Service/Laptop" responsibility.
2. Confirm that the MANAGE MOBILE USERS concurrent program has run after the test user has been created.
3. Install the laptop application on a test laptop. Please refer to [Appendix A, "Installing the Laptop Application"](#) for details on how to install the laptop application.
4. Go to the Field Service Dispatch Center, create a task, and assign it to the test user.

5. Synchronize the laptop.
6. The task should be sent out and received on the mobile application.
7. Change the task assignment status on the laptop device and then synchronize. Confirm that the task status update is reflected in the dispatch center.

Diagnostics and Troubleshooting

This chapter describes how to run diagnostics and troubleshoot runtime problems for Oracle Mobile Field Service/Laptop.

6.1 Running Diagnostic Tests

You can run the following diagnostic tests at any time to verify the correct setup of Oracle Mobile Field Service/Laptop.

- **Check Profiles:** This test checks if the profiles needed for replication have valid values.
- **User hook status:** This test checks if all user hooks are available.

For information on how to use Oracle Diagnostics to run tests, please refer to the *Oracle Applications CRM System Administrator's Guide*.

6.2 Viewing Items Stocked In a Subinventory

Problem

Trackable items that have been stocked in a subinventory are not displayed in the inventory list of the application.

Resolution

This may be a replication issue; please check that installed base instances have been created for the stocked items in the back end database. If the instances do exist but the items still do not display on the laptop, please contact Oracle Support. For more information about trackable items, please see [Appendix B, "Setting Up Debrief Material Reporting."](#)

6.3 Final Checks

If you have problems running the application on the laptop, check that the following requirements have been met. Unless these requirements have been met, users will not be able to synchronize and work with the application:

- Labor items must be created and associated with the field service representative's inventory.
- The task state diagram must be set up in Field Service.
- Field service representatives must have a location associated with them.
- A Request or Task must have a location before it can be scheduled.
- Users must be granted the "Field Service/Laptop" responsibility.

Administering Oracle Mobile Field Service/Laptop

This chapter describes how to perform administrative tasks for Oracle Mobile Field Service/Laptop.

7.1 Managing Mobile Users

Users who have the "Field Service/Laptop" responsibility assigned to them will have access to the Oracle Mobile Field Service/Laptop application. To create users for Oracle Mobile Field Service/Laptop, create the users as described in the *Oracle Field Service Implementation Guide*. Please confirm that the following procedures have been completed:

- Setting Up Employees
- Setting Up Resources
- Setting Up Field Service

When the above procedures have been done, then assign the "Field Service/Laptop" responsibility to the users. Access to the laptop application will be based on the same usernames and passwords as the enterprise system.

There is a concurrent program in the Oracle Mobile Application Foundation (MANAGE MOBILE USERS) that periodically allocates resources for users that have a mobile responsibility, so there will be a delay between when the responsibility is assigned and when the change will take effect. Please refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide* for information on this concurrent program.

Users can only change their passwords while connected online through the forms/HTML interface as discussed in the *Oracle Applications System Administrator's Guide*.

The system administrator can change a user's password for them as discussed in the system administrator's guide.

If you remove the "Field Service/Laptop" responsibility from a user, then that user will no longer be able to use the laptop application and synchronize. However, the application will remain on his or her laptop.

7.2 Setting the Conflict Resolution Rule

The profile option **JTM: Conflict Rule** specifies the conflict resolution rule that will be followed in case of updates to the same entity by both the server and a laptop user.

This profile option enables the Oracle Mobile Field Service/Laptop application to handle updates to the database from the mobile devices. The two choices are:

- **Client wins.** Changes made by the mobile user are always applied to the enterprise database. No timestamp checking is done.
- **Timestamp.** Changes made by the mobile user are applied to the enterprise database if the record has not been modified since the mobile user last synchronized. If the record has been modified in the meanwhile, then the mobile user's change is not applied.

7.3 Reviewing Deferred Upload Errors

Upload errors are generated during the upload process when some of the data fails to be applied to the enterprise database. Upload errors can be caused by the following:

- **System Issues:** It is possible that the system is on a different mobile applications patch level than what is required.
- **Setup Issues:** The right business process type or the right profile setting is not set on the enterprise system. For example, for an expense line, it is necessary that the expense type is set correctly.
- **Faulty Data or Conflicts**

The mobile foundation maintains a log of all upload errors. You can use the mobile foundation user interface to view and manage these errors. Please refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide* for how to apply and solve deferred upload error issues.

Installing the Laptop Application

This appendix describes how to install Oracle Mobile Field Service/Laptop onto a laptop computer and start using the application.

A.1 System Requirements

A.1.1 Minimum Hardware Requirements

- Computer: IBM-compatible with Pentium III processor
- Disk space: 1 GB
- Monitor: 256 color display
- RAM: 128 MB
- Other requirements: serial port, Internet connection, mouse or pointer device

A.1.2 Minimum Software Requirements

- Operating System: Windows NT 4.0 (Service Pack 5), Windows 98, Windows 2000, or Windows XP
- Browser: MS Internet Explorer, version 5.5 or later. This is the recommended browser for all HTML-based applications.

A.2 Installing the Application on Your Laptop

Perform these steps on the laptop:

1. Open a Web browser window.

2. Open the following URL, where <Mobile Server> is the domain name or IP address of the Mobile Server:

http://<Mobile Server>/setup

For example: `http://130.35.88.214/setup`

3. Click on the link to download the **Mobile Client for Laptop** setup program and save it.

If you are using Internet Explorer, right click with the mouse, choose the option **Save target as**, and click **OK**. Choose a location to save the setup program and click **Save**.

4. Using Windows Explorer, double-click on the **setup.exe** file that you just downloaded in order to run the setup program.

Once started, the setup program prompts you to specify an install directory.

Choose a directory, for example, `C:\ora_HOME`, and click **OK**. The setup program downloads all the required components.

5. Once the installation is completed, your browser will launch.

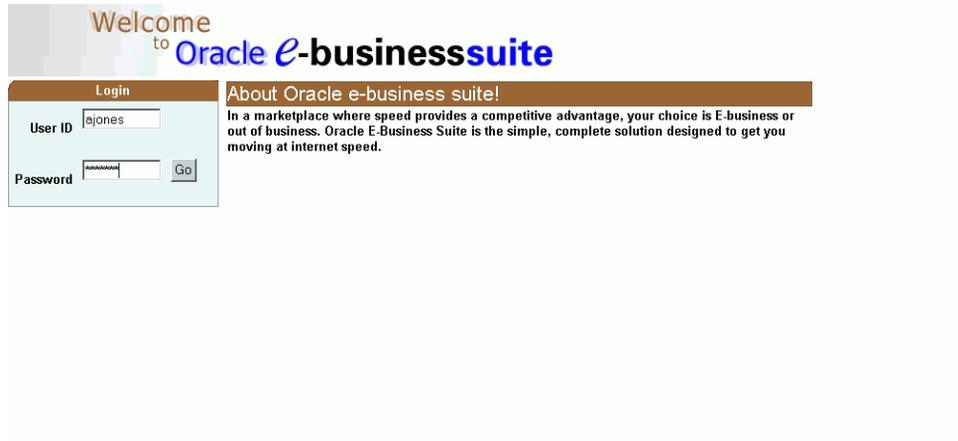
If the browser does not launch automatically, the setup program box will have the Web-to-go URL displayed on it (for example, `http://my-laptop`). Please click on the URL.

Note: You can always use the URL **http://localhost** to access the Web-to-go server without needing to know the name of the laptop.

After the browser has launched, log on using the same user name and password that you use for online applications.

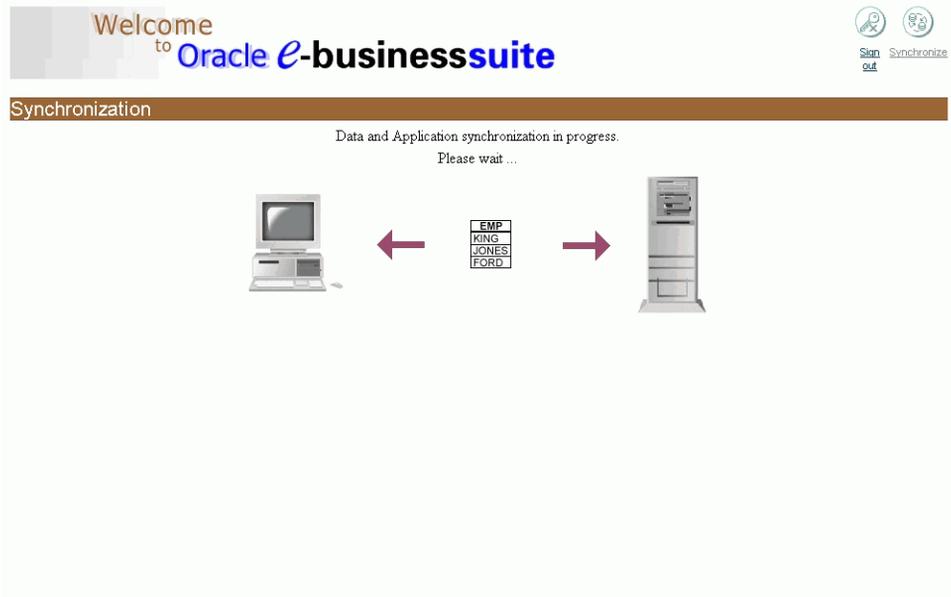
If the browser returns a "Page Not Found" error, please check your proxy settings. Make sure that in Internet Explorer under **Tools > Internet Options > Connections > LAN Settings** the checkbox for **Bypass Proxy for Local Addresses** is checked. Reload the page and try again.

Please refer to the following screenshot:



6. When you click the **Go** button, you will see the synchronization screen. The initial synchronization will download the application and your initial set of data. The synchronization will take several minutes. Please do not close or exit the browser until the synchronization is complete.

Please refer to the following screenshot:



7. When the synchronization is complete, the browser will display the Calendar tab of the Field Service/Laptop application.

Please refer to the following image:

ORACLE
Oracle Field Service/Laptop

Home Calendar Information Messaging

Quick Find Customer Go! Advanced Search

Calendar: Daily View 17-Jul-2002 GO

Request	Scheduled	Travel Time	Customer	Task Name	Task Number	Product	*Status
10126	07:56		Business World 2 High Street Birmingham	Test 1	11491	Sentinel Deluxe Desktop	Completed
10128	09:55		Brenda Johnson 2561 Oak Drive Santa Monica	Test 2	11492	Sentinel Deluxe Desktop	Interrupted
10130	10:00		Business World 899 Greenhill Dr Minneapolis	Test 3	11493	Final Chip Assembly	Assigned

First | Previous 1 - 3 of 3 Next | Last

Update Create Personal Task

A.3 Starting Oracle Mobile Field Service/Laptop

To start Oracle Mobile Field Service/Laptop in the future, perform the following steps:

1. Start the **Web to Go** server from the taskbar, either by the navigation path **Start > Programs > Oracle for Windows NT > Web to Go** or by right-clicking the Web to Go icon and selecting **Open URL**.
2. Your Internet browser will open to the login page. Enter your user name and password.

The application will open up as described above.

Setting Up Debrief Material Reporting

This appendix describes how to set up the reporting of debrief material from Oracle Mobile Field Service/Laptop.

B.1 Setting Up Debrief Material Reporting

To be able to report material used or recovered in Oracle Mobile Field Service/Laptop, you have to perform various setup procedures in the Forms application. The following are the setup procedures:

- [Defining Transaction Billing Types](#)
- [Linking Transaction Billing Types to Billing Categories and Field Service Business Processes](#)
- [Creating Install Base Transaction Types](#)
- [Creating a Trackable Item](#)
- [Setting the Item Type and Billing Type](#)

B.1.1 Defining Transaction Billing Types

A transaction billing type is the billing type that is associated with a particular transaction type. There are three transaction billing types:

- Time
- Material
- Expense

From the Forms application, complete the following steps to define Transaction Billing Types:

Steps

1. In the Responsibilities window, select **Field Service Administrator** and then click **OK**.

The **Navigator - Field Service Administrator** window appears with the **Functions** tab active.

2. Select **Installed Base** and then click **Open**.

A list of items appears under the **Installed Base** item.

3. Select **Transaction Billing Types** and then click **Open**.

The **Transaction Billing Types** window appears.

4. From the **Line Category Code** field in the **Transaction Types** section, select either **ORDER** or **RETURN**.

This selection depends on whether the transaction type is going to be used for parts in or parts out transactions.

5. From the **Name** field in the **Related Billing Types** section, select **Material**.

It is not necessary to complete any other fields in the **Functions** tab of the **Navigator - Field Service Administrator** window.

The following billing types should already exist (since this is seeded data):

- Expense
- Labor
- Material

B.1.2 Linking Transaction Billing Types to Billing Categories and Field Service Business Processes

After you define transaction billing types, you can then link them to field service business processes. A business process is a grouping level to define which transaction types can be used in an area. Examples of areas are "Field Service" and "Depot Repair."

From the Forms application, complete the following steps to link transaction billing types to field service business processes:

Steps

1. In the Responsibilities window, select **Field Service Administrator** and then click **OK**.

The **Navigator - Field Service Administrator** window appears with the **Functions** tab active.

2. Select **Installed Base** and then click **Open**.

A list of items appears under the **Installed Base** item.

3. Select **Business Process** and then click **Open**.

The **Business Process Transactions** window appears.

4. In the **Business Process** section, complete the **Name** field.

5. Ensure that the **Field Service** checkbox is selected.

6. Optionally, complete the **Effective Dates** fields in the Business Process section and then check that the "to" and "from" dates are valid.

7. In the **Transactions** section, add transaction types to the **Transaction Type** fields.

- a. Click in a **Transaction Type** field and then click the ellipsis (. . .) button.

The **Find Order Transaction Type** pop-up window appears.

- b. Select the desired **Type** from the pop-up window and then click **OK**.

The transaction type appears in a **Transaction Type** field in the Transactions section. Oracle Field Service/Laptop automatically completes the **Effective Dates From** field, but the **Effective Dates To** field is left blank.

- c. Optionally, complete the **Effective Dates To** field.

B.1.3 Creating Install Base Transaction Types

An Install Base transaction type or transaction subtype is a transaction type that contains additional criteria about a transaction type. An Install Base transaction type needs to be set up for an Install Base. Creating an Install Base transaction type is done based on an existing transaction billing type.

From the Forms application, complete the following steps to create an Install Base transaction type:

Steps

1. In the **Responsibilities** window, select **Oracle Installed Base Admin** and then click **OK**.

The **Navigator - Oracle Installed Base Admin** window appears with the **Functions** tab active.

2. Select **Setups** and then click **Open**.

A list of items appears under the **Setups** item.

Select **Installed Base Transaction Types** and then click **Open**.

The **Transaction Sub Types** window appears.

3. In the **Transaction Sub Type** section, select the **Service Type** checkbox.

4. Click in the **Name** field and then click the ellipsis (. . .) button.

The **IB Transaction Types** pop-up window appears.

5. Select an IB transaction type.

6. In the **Source Transaction Types** section, click in an **Application Name** field and then click the ellipse button.

The **Application Name** pop-up window appears.

7. Select **Field Service** and then click **OK**.

8. Click in a **Transaction Name** field and then click the ellipsis (. . .) button.

The application automatically completes the **Transaction Name** field with **Field Service Report**. It also automatically completes the **Transaction Type** and **Description** fields.

9. To use the transaction subtype for Install Base updates, select the **Update IB** check box.

If you select the **Update IB** check box, then you need to select various check boxes in the **Source Info** section of the **Transaction Sub Types** window so that the application can support the Install Base update.

Setup 1:

This setup applies when either of the following are true:

- The **Update IB** check box is not selected.

- The **Update IB** check box is selected, and the **Line Category Code** field in the **Transaction Types** section of the **Transaction Types** page is set to **ORDER**.

In this case, the following should be specified in the **Source Info** section of the **Transaction Sub Types** window:

- The **Reference Req'd** check box is selected.
- The **Change Owner** check box is selected.
- The **Change Owner To** field is set to **External**.
- The **Return Req'd** check box is not selected.

Setup 2:

This setup applies when the following is true:

- **Update IB** check box is selected, and the **Line Category Code** field in the **Transaction Types** section of the **Transaction Types** page is set to **RETURN**.

In this case, the following should be specified in the **Source Info** section of the **Transaction Sub Types** window:

- The **Change Owner** check box is selected.
- The **Change Owner To** field is set to **Internal**.
- The **Return Req'd** check box is not selected.

Also in this case, the following should be specified in the **Parent Info** section of the **Transaction Sub Types** window:

- The **Reference Req'd** check box is not selected.

B.1.4 Creating a Trackable Item

In this section, the term *trackable* indicates that you are able to search for an item in the Oracle Mobile Field Service/Laptop application. In contrast, *nontrackable* indicates that you are not able to search for an item. You specify an item as trackable in the Forms application.

In Inventory, you can define a system item, such as a keyboard. For this item, you can specify a trace life cycle. With this feature enabled, you are able to track the item to learn if it has been installed or removed at a customer site. A trackable item is also maintained in the install base.

From the Forms application, complete the following steps to create a trackable item:

Steps

1. In the Responsibility window, select **Inventory** and then click **OK**.
The **Navigator - Inventory** window appears with the **Functions** tab active.
2. Select **Items** and then click **Open**.
A list of items appears under the **Items** item.
3. Select **Master Items** and then click **Open**.
The **Organizations** pop-up window appears.
4. Select an organization from the **Organizations** pop-up window.
The **Master Item** window appears with the **Main** tab active.
5. Click the **Inventory** tab.
6. Select the **Network Logistics Trackable** check box in the **Network Logistics** section on the **Inventory** tab.

B.1.5 Setting the Item Type and Billing Type

From the Forms application, complete the following steps to set the item type and billing type:

Steps

1. In the Responsibility window, select **Inventory** and then click **OK**.
The **Navigator - Inventory** window appears with the **Functions** tab active.
2. Select **Items** and then click **Open**.
A list of items appear under the **Items** item.
3. Select **Master Items** and then click **Open**.
4. Select an organization from the **Organizations** pop-up window.
The **Master Item** window appears with the **Main** tab active.
5. Click the **Service** tab.
6. Select the **Serviceable Product** check box.
7. Select the master item billing type from the **Billing Type** drop-down list.

Setting Up for Install Base Transactions

This appendix describes the Install Base setup procedures that are relevant to Oracle Mobile Field Service/Laptop implementation.

C.1 Setting Up System Items for Install Base Transactions

Use the following procedure to set up system items for Install Base Transactions.

Steps

1. Create a Miscellaneous Transaction, putting the Item in a Subinventory.
2. Under responsibility **Inventory**, navigate to **Setup > Organizations > Subinventories**.
3. Create at least one Subinventory in the Service Master Organization (this is defined in profile ASO_PRODUCT_ORGANIZATION_ID).

The Subinventory should be a **Quantity Tracked, Asset** Subinventory. Set the **Locator Control** value to **None**. Also create a Subinventory in the Laptop Inventory Organization (which will be used as the good Subinventory).

4. Create System Items that are:
 - **Transactable** (Inventory tab page)
 - **Trackable** (Inventory tab page)
 - **Serviceable** (Service tab page)
 - Of type **Material** (Service tab page)

in the same organization as the Subinventory of the Mobile Resource.

5. Put the Trackable Item you defined above in your good Subinventory (using Miscellaneous Transactions). Also put a Non-Trackable Item there. The Trackable Item should be created as an Install Base product instance in the backend.
6. Under the responsibility **Field Service Manager**, navigate to **Spares Management > Setup > Resource Addresses and Subinventories**. Create a new record for your Mobile Resource by entering its name. Assign a Primary Address and the two Subinventories you created to it.
7. The condition of the Subinventory in the Master Organization should be set to **Defective** and the condition of the Laptop Organization Subinventory should be set to **Usable**.

C.2 Setting up Install Base Profile Options

Make sure that profiles listed in the following table have been set:

Profile Name	Value	Comments
CSE: Miscellaneous Issue to Project Transaction Type	Issue to	none
CSE: Miscellaneous Receipt From Project Transaction Type	Receipt from	none
CSE: PA Expenditure Type	Material	none
CSE: Bypass Event Queue	Y	This profile is used to bypass some queues, so when miscellaneous transactions are created they will be directly inserted into Install Base.

Adjusting Transaction Types so they can be used for Install Base updates can be done under the responsibility **Installed Base Admin** and navigating to **Setups > Transaction Types and Sub Types**. Transaction Types can be used for Removing Install Base products by setting the **Change Owner To** field in the **Source Info** section of the form to **Internal**.

By setting it to **External**, the Transaction Type can be used for installing new Install Base products.

C.3 Removing and Installing Parts in Oracle Mobile Field Service/Laptop

Whether an Install Base update is done when removing a part in Oracle Mobile Field Service/Laptop depends on the selected Transaction Type when doing a Material Transaction.

If the **Change Owner To** value of the selected Transaction Type was set to **Internal**, then the Install Base product to be removed can be indicated in the Laptop application.

If the **Change Owner To** value was set to **External**, then a Trackable Product can be indicated from a **Usable** Subinventory. An Install Base product will be created upon Debriefing the Material Transaction in Field Service Report with **Update Installed Base** checked.

Spares Management on the Laptop

This appendix describes the ordering and transferring of spare parts in Oracle Mobile Field Service/Laptop.

D.1 Ordering and Transferring Parts

To create an Item Order in Oracle Mobile Field Service/Laptop, at least one usable (good) Subinventory has to be defined and assigned to the field service representative. Two usable Subinventories have to be defined and assigned to the field service representative in order to do transfers.

Subinventories can be set up while using the **Field Service Administrator** responsibility. Navigate to **Field Service Dispatcher > Spares Management > Setup > Resource Addresses and Subinventories**. The **Resource Addresses and Subinventories** form will display.

D.1.1 Setting Up Resource Addresses and Subinventories

Resource Addresses can be used by the field service representative when ordering an item to indicate where the item should be sent to.

Steps

1. Type a resource type and name in the **Resource Type** and **Resource Name** fields.
2. Enter resource addresses:
 - a. On the **Addresses** tab, enter the address style in the **Style** field and click the **Address** field.

Setting Up Descriptive Flexfields

This appendix describes how to set up descriptive flexfields in relation to Oracle Mobile Field Service/Laptop.

E.1 Setting up Descriptive Flexfields

Perform the following procedure to set up the Descriptive Flexfields in Oracle Applications that are specific to Oracle Mobile Field Service/Laptop:

Steps

1. Log in to Oracle Applications as a system administrator and choose the responsibility **System Administrator**.
2. Navigate to **Application > Flexfield > Descriptive > Segments**.
3. Click on the **Application** field and search for **Oracle Service**.
4. Click the **Title** field and search for the component for which the Flexfield(s) should be created.

The following table lists the possible values that can be selected here for flexfield creation or updates:

Value for Application Field	Value for Title Field
Oracle Service	Customers
Oracle Service	Service Request
Oracle Service	Tasks
Install Base	Item Instance Flexfield Details

Value for Application Field	Value for Title Field
Oracle Inventory	Items

5. The **Freeze Flexfield Definition** check box indicates whether or not Flexfields can be defined or updated. Make sure it is deselected so new Flexfields can be defined.
6. Click the **Segments** button to display the **Segments Summary** form.
7. Click **New** or open an existing Flexfield definition by clicking **Open**.
8. Enter the Segment name in the **Name** field.
9. Click the button next to the **Column** field and select an attribute column from the **Column** list of values.
10. Enter a description in the **Description** field and a number in the **Number** field.
11. Click the search button in the **Value Sets** field and select a value set (this is the data type of the Flexfield) from the list of values. The **Description** field will be automatically filled.
12. You can also select a default type from the **Default Type** list of values to indicate a default value in the **Default Value** field. Select or deselect the **Required** check box to specify whether a value is required or not.
13. Specify the Flexfield size information in the **Sizes** section of the form.
14. Optionally, specify prompt information in the **Prompts** section of the form. For example, prompts could be used when displaying a window that requests data input for the Flexfield.
15. Optionally, click **ValueSet** to open the form where you can define new value sets or update existing value sets.
16. Save the new Flexfield definition by clicking **Save** icon and closing the **Segments** form.
17. Review the **Segments Summary** form is shown and close it.
18. If no more updates are needed, select the **Freeze Flexfield Definition** checkbox.
19. Click the **Compile** button.

Setting Up State Transitions

F.1 Setting Up Task Status Transitions

Follow this procedure to set up task status transitions.

Steps

1. Switch to the responsibility **Field Service Manager**.
2. Navigate to **Field Service Setup > CRM Foundation > Task and Escalation Manager > Setup > Define Task Status**. The **Task Statuses** form displays.
3. Click the **Define Transition** button to display the **Status Transitions** form.
4. On the **Rule** tab, select **Task State Transition** for the **Source** field, **Field Service** for the **Application** field, and **Field Service** for the **Rule Name** field.
5. Verify that the **Field Service** status rule is correct. The (seeded) **Field Service** status rule is defined in the following table:

Current State	Next State
In Planning	Assigned
In Planning	Cancelled
Assigned	Accepted
Assigned	Rejected
Assigned	Cancelled
Assigned	Completed
Assigned	Working

Current State	Next State
Accepted	Rejected
Accepted	Cancelled
Accepted	Working
Rejected	Assigned
Rejected	Accepted
Rejected	Cancelled
Rejected	Working
Cancelled	In Planning
Cancelled	Assigned
Cancelled	Closed
Completed	Closed
Working	Cancelled
Working	Completed
Working	Interrupted
Interrupted	In planning
Interrupted	Assigned
Interrupted	Cancelled
Interrupted	Completed
Interrupted	Working
Unassigned	In Planning
Unassigned	Assigned
Unassigned	Cancelled

F.2 Assigning the State Transition Rule to a Responsibility

Use this procedure to assign the state transition rule to a responsibility.

Steps

1. Click the **Responsibility** tab. Select a responsibility in the **Responsibility** field.

2. Assign the rule to the responsibility by selecting the rule name in the **Rule** field.
3. **Save** your work.
4. Close the form.

