

Oracle® Mobile Field Service

User Guide for Laptops

Release 11i (11.5.9)

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

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Send Us Your Comments

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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
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- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us by sending electronic mail to the following address: mobiledocs_us@oracle.com

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Intended Audience

Welcome to Release 11i (11.5.9) of the *Oracle Mobile Field Service User Guide for Laptops*. This guide describes how to use the Oracle Mobile Field Service/Laptop application. It also describes the application components, key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

To use this guide, you should have a working knowledge of the following:

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

See "[Other Information Sources](#)" for more information about Oracle applications product information.

If you have never used Oracle Mobile Field Service, Oracle suggests you attend one or more of the Oracle Mobile Field Service training classes available through Oracle University.

How To Use This Guide

This guide contains the information you need to understand and use Oracle Mobile Field Service/Laptop.

- [Chapter 1, "Understanding Oracle Mobile Field Service/Laptop"](#) describes what Oracle Mobile Field Service/Laptop is and how to administer it. This chapter also describes how the application is structured and how you can navigate in it.

- [Chapter 2, "Installing Oracle Mobile Field Service/Laptop"](#) describes what is needed to install and use the Oracle Mobile Field Service/Laptop application. It also describes how to launch the application.
- [Chapter 3, "Using Oracle Mobile Field Service/Laptop"](#) describes how to use all the functionality associated with the navigational tabs in the application.
- [Appendix A, "Setting up Schedules and Responsibilities"](#) describes the different levels of control the field service representative can exercise when doing his job.

Typographic Conventions

The following table describes the typographical conventions used in this guide:

Conventions	Explanation
<i>italics</i>	Introduces new terms that you may not be familiar with, and is used occasionally for emphasis.
bold	Emphasizes important information. Also indicates button or option selections. For example, click Next .
UPPERCASE	Indicates the name of a file. For operating environments that use case-sensitive file names, the correct capitalization is used in information specific to those environments. Also indicates keys or key combinations that you can use. For example, press the ENTER key.
monospace	Indicates syntax examples, values that you specify, or results that you receive.
<i>monospaced italics</i>	Indicates names that are placeholders for values you specify; for example, <i>filename</i> .
>	Indicates a selection from a menu. For example, Start > Programs > Oracle for Windows NT > Web-to-Go

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our

documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

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Other Information Sources

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

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

Online Documentation

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

Related Documentation

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

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

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

Documents Related to All Products

Oracle Applications User's Guide

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

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

Documents Related to Oracle Mobile Field Service/Laptop

Oracle Mobile Field Service User Guide for Field Service/Palm Handheld Devices

This guide explains how to use the Oracle Mobile Field Service/Palm application. It also describes the application components, key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Oracle Mobile Field Service Implementation and Administration Guide for Field Service/Laptop

This guide explains how to implement and administer the Oracle Mobile Field Service/Laptop application. It covers software and hardware requirements, dependencies, implementation tasks, implementation verification, diagnostics and troubleshooting, administrative tasks, and migration tasks.

Oracle Mobile Field Service Implementation and Administration Guide for Field Service/Palm Devices

This guide explains how to implement and administer the Oracle Mobile Field Service/Palm application. It covers software and hardware requirements, dependencies, implementation tasks, implementation verification, diagnostics and troubleshooting, administrative tasks, and migration tasks.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Mobile Field Service/Laptop and reach full productivity quickly. You have a choice of

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Mobile Field Service/Laptop working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle9i server, and your hardware and software environment.

OracleMetaLink

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

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as

SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

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

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

About Oracle

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

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

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

Understanding Oracle Mobile Field Service/Laptop

This chapter describes what Oracle Mobile Field Service/Laptop is and how to administer it. This chapter also describes how the application is structured and how you can navigate in it.

1.1 What is Oracle Mobile Field Service/Laptop

Oracle Mobile Field Service/Laptop is part of the Oracle Field Service suite of products. (See the "[Overview of the Oracle Field Service Suite](#)" on page 1-2 for complete details.) This application is a disconnected-solution that enables a field service representative to service a customer in a fully automated and computer-efficient way. This means that schedules are received and updated in a timely manner and service requests are resolved quickly.

With the power of Oracle Mobile Field Service/Laptop, the information gap between the service organization and the field service representative is eliminated. For instance, a field service representative automatically receives the customer service history with the service request. Equipped with this information, he can better carry out his responsibilities at the customer site. Likewise, the field service representative is aware of any customer install base information since this is downloaded as part of the service request. This information is detailed and includes all the counter readings for the customer product. If replacement parts are need for a customer product, the field service representative can access the robust spare parts management feature of Oracle Mobile Field Service/Laptop. When the field service representative has completed a task, he can report the time, materials, and expenses incurred during his work. This information can then be sent back to the service organization at electronic speed so that an invoice can be given to the customer in a timely manner. All this automation enables you to reduce your operating and

administrative costs, thus giving you a competitive edge and ultimately increasing your service revenues.

Because the Oracle Mobile Field Service/Laptop runs on a laptop computer, it is highly mobile and usable. The service request, and all associated information, is stored locally on the laptop computer. This enables a field service representative to work in all places independent of network coverage. The dispatcher sends a job to the field service representative using Oracle Service Online, Oracle's field service application.

1.2 Overview of the Oracle Field Service Suite

The Oracle Field Service suite supports an automated process used by service organizations to manage their field service operations. It assists in the entire service process from taking the customer call to fixing and reporting on the problem at a customer site. The Oracle Field Service suite offers a range of products to meet your organization's business needs. The following table lists all the products in the suite.

Suite Application	Description
Customer Care	Customer Care is not really a product of the Oracle Field Service suite but the Service Request form is delivered with the Oracle Field Service application. The Service Request form takes the customer's call for service and creates a service request.
CRM Foundation	The products in CRM Foundation are essential to use Oracle Field Service. They are used to create tasks, territories, define resources, and help in the assignment of tasks to resources. CRM Foundation comes with Oracle Field Service.
Oracle Field Service	This application assists in assigning tasks to service representatives, creating and dispatching daily schedules, monitoring progress, and reporting on material, expense, and labor transactions.
Scheduler	This application enables optimization of scheduling capabilities of tasks to qualified resources. It takes into account driving time, distance, and part availability, and it creates part reservations.
Spares Management	This application is used to provide additional logistics and planning features to manage a service parts inventory in a multi-location environment.

Suite Application	Description (Cont.)
Mobile Application Foundation	This application consists of a mobile client and a central application. It provides data transport between the Oracle enterprise system and the Oracle mobile client database.
Oracle Mobile Field Service/Laptop	This application is a disconnected application typically installed at a service representative's laptop to receive his daily schedule and report on progress, material, expense, and labor.
Oracle Mobile Field Service/Palm	This application is a disconnected application for a handheld device so a service representative can receive his daily schedule and report on progress, material, expense, and labor.

1.3 The Oracle Field Service Process

The field service process has six basic steps. This process starts with the creation of a service request. The service request has at least one task, which is completed by a field service representative in the field. After completing a task, the field service representative electronically submits the task details to the home office, which is now able to create an invoice. The field service process is driven by the service request status and task status changes, electronically exchanged between the field service representative and home office.

The following table describes the six basic steps of the field service process:

Steps	Description
1. Service request intake and validation	There are several ways to report a request for service. The customer can create the request by using the Web, Computer Telephone Integration (CTI), e-mail, or by dialing into a call center where an agent takes the call. A service request can also be created by a field service representative through a project or by a sales order (installation of a product). When the request is received, the customer, product and contract are checked in the validation step.

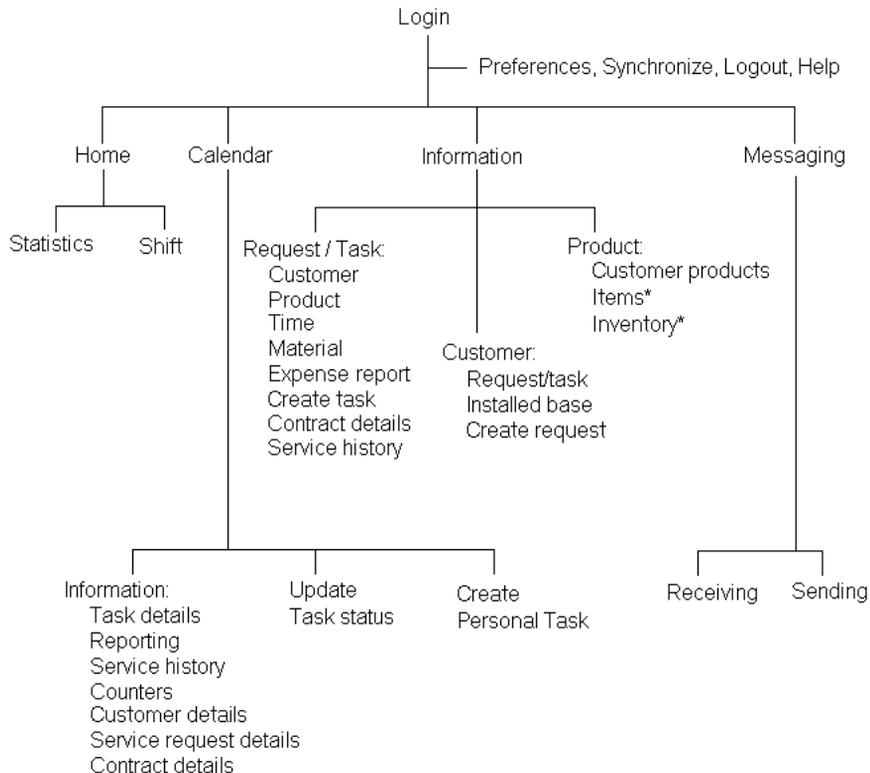
Steps	Description (Cont.)
2. Service request screening and qualification	After a service request is created, it is screened to avoid a field visit. The service request is analyzed by a support agent who searches the knowledge base for a solution. As an outcome of this process, the request may be closed, a part may be shipped to the customer, or the customer might ship the part for in-house repair. When a field visit is required, a task is created based on the problem description and action needed to resolve the problem. A definition for the parts necessary to resolve the task is also given. The creation of a task for installation or maintenance of customer product can be created automatically from a service contract or sales order.
3. Service request planning and dispatch	The tasks must be scheduled, assigned, and dispatched to the field service representative. The scheduling of the tasks is done based on various constraints such as skills, location, availability, and required parts. When the tasks assignment is done, the task or schedule is dispatched to the service representative. The service representative receives notification and progress on the task is monitored.
4. Service request delivery and reporting	Once the field service representative receives an assigned task or schedule, he can begin service at the customer site. He reports on progress, materials used and recovered, expenses, and labor time. Additionally, he can record counter readings and describe how the problem was resolved. It might be necessary to create new tasks or service requests if the field service representative cannot help the customer immediately. He can recover the product or product part for repair. All the reported information is used for billing the customer. Reporting on materials-used also results in automatic replenishment of the inventory in the service vehicle.
5. Service request monitoring	Unforeseeable events can occur that impact the progress of a task. In this case, escalations can be raised to indicate this situation.
6. Service request completion and billing	When the field service representative completes a task, he sets the task status as COMPLETE and moves on to the next task. The task information is checked by an agent at the home office for any service contract coverage and then an invoice is created. The inventories, sub-inventories, and install base are all updated.

Note: Depending on your service organization, the above steps can be separated or combined.

The component in step 4, [Service request delivery and reporting](#), can be applied using Oracle Mobile Field Service/Laptop. In this application, the schedule is received by the service representative on his laptop computer. He records counter readings and reports on material used, labor time, and expenses incurred.

1.4 Navigation Path

This diagram shows the high-level structure of the Oracle Mobile Field Service/Laptop application.



* You can order parts to replenish your subinventory. Also, you can transfer parts across subinventories (see "[Ordering a Part](#)" on page 3-55).

The Preferences, Synchronize, Logout and Help text in the above figure represents the global help buttons. See "[Global Button Functionality](#)" on page 3-67 for complete details. The Home, Calendar, Information, and Messaging headers in the above figure represent the four navigational tabs in the Oracle Mobile Field Service/Laptop application. The Home page is where you view you tasks for the day. The Calendar page is where you view your calendar with all of the scheduled tasks assigned to you. The Information page is the central point for finding all the information about customer, service requests, and tasks. The Messaging page is

where you send and receive messages to other people within your organization. See the appropriate sections in this guide for more details about each page.

Installing Oracle Mobile Field Service/Laptop

This chapter describes what is needed to install and use the Oracle Mobile Field Service/Laptop application. It also describes how to launch the application.

2.1 Minimum Hardware Requirements

The following are the minimal hardware requirements necessary to run Oracle Mobile Field Service/Laptop:

- 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

2.2 Minimum Software Requirements

The following are the minimal software requirements necessary to run Oracle Mobile Field Service/Laptop:

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

2.3 Installing the Software

This section describes how to install the Web-to-Go server and Oracle9i Lite database, in addition to the Oracle Mobile Field Service/Laptop application. This additional software is necessary for Oracle Mobile Field Service/Laptop to operate.

Complete the following steps from your laptop computer:

1. Open your default browser.
2. Enter the following URL in your browser, where <XXX> is the name of the Mobile server:

```
http://<XXX>/setup
```

3. Click the **Mobile Client for Laptop** link to download the `setup.exe` file and then save it to your hard drive.

For Netscape, choose a location to save the setup program and then click **Save**.

For Internet Explorer, right-mouse click on the link and choose the Save target as option. In the Save As dialog box, choose where to save the setup program and then click **Save**.

4. Run `setup.exe` to install the Web-to-Go server.

You can execute `setup.exe` from the Run dialog box (Start > Run) or by locating this file in Windows Explorer.

5. After the browser has launched, log on using your user name and system password.



6. Click the **Synchronize** button in the upper right corner of the page. The Synchronization page opens.



The synchronization process can take a few minutes; therefore, do not abort the process. If the synchronization process fails, contact your system administrator.

When synchronization has completed, the Oracle Mobile Field Service/Laptop application and the Oracle9i Lite database are installed on your laptop computer.

7. Click **Cancel** when synchronization finishes and a success message appears.

2.4 Starting the Application

Complete the following steps to start Oracle Mobile Field Service/Laptop:

1. Choose Start > Programs > Oracle9i Lite > Web-to-Go

The Web-to-Go icon appears in the system tray. The system tray is located in the Windows taskbar, usually at the bottom of the screen. The system tray contains the clock and miniature icons for easy access to system functions such as printer, modem, and volume control.

2. Double click on the Web-to-Go icon in the system tray.

Your internet browser opens to the Oracle E-Business Suite login page. See "[Installing the Software](#)" on page 2-2 for a description of this page.

3. Enter your user name and password in the appropriate fields.
4. Click **Go**.

Oracle Mobile Field Service/Laptop opens the Calendar page.

ORACLE
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

Daily

Quick Find Customer Go! [Advanced Search](#)

Calendar: Daily View 17-Jul-2002

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 2581 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

In order to receive new data assigned to you, such as new tasks and service requests, you need to synchronize with the enterprise system. Likewise, to send the changes that you make, such as creating debrief lines and updating task statuses, you need to synchronize with the enterprise system.

5. Establish a telephone / internet connection for your laptop computer.
6. Click the **Synchronize** button in the upper right corner of the page.

The information on your laptop computer is synchronized with the enterprise system. Synchronizing your data can take a few minutes; therefore, do not abort this process. If the synchronization process fails, contact your system administrator.

Using Oracle Mobile Field Service/Laptop

This chapter describes how to use all the functionality associated with the following pages:

- Calendar
- Information
- Messaging
- Home

3.1 Application Overview

As a field service representative, you will have the following general responsibilities when using Oracle Mobile Field Service/Laptop:

- Synchronize with the enterprise system at the beginning of each work day
- Review your calendar for the day
- Visit the customer and then update service requests and tasks
- Report service request and task details

The following is a general outline of how a field service representative may start and end his work day:

1. Launch Oracle Mobile Field Service/Laptop
See "[Launching Oracle Mobile Field Service/Laptop](#)" on page 3-3.
2. Synchronize Oracle Mobile Field Service/Laptop with the enterprise system
See "[Synchronizing with the Enterprise System](#)" on page 3-67.

3. Review your calendar for the day and then set the status of the task on which you will be working.
See ["Viewing and Opening Tasks"](#) on page 3-5.
4. Create a personal task if you need to communicate any unavailability.
See ["Creating a Personal Task"](#) on page 3-8.
5. Record the time before visiting the customer site.
See ["Creating a Time Report"](#) on page 3-33.
6. Open the task and view or change task information.
See ["Viewing and Opening Tasks"](#) on page 3-5 and ["Viewing and Changing Task Information"](#) on page 3-25.
7. Review customer information.
See ["Viewing Customer Information"](#) on page 3-9
 - Review contract information.
See ["Viewing Contractual Information"](#) on page 3-19.
 - Review service history information.
See ["Viewing Service History"](#) on page 3-23.
 - Create or update a customer note if necessary.
See ["Creating and Viewing Notes"](#) on page 3-30.
8. Update or enter any service request information.
See ["Viewing and Changing Service Request Information"](#) on page 3-15.
9. Set any counter and counter properties.
See ["Setting Counters and Counter Properties"](#) on page 3-50.
10. Report task details.
See ["Debrief Reporting"](#) on page 3-32.
11. Order or transfer any necessary parts needed to finish the task.
See ["Spares Management"](#) on page 3-54.
12. Record the time prior to leaving the customer site.
See ["Creating a Time Report"](#) on page 3-33.

13. Repeat these steps for each task that time allows.
14. Finally, exit out of Oracle Mobile Field Service/Laptop.
See "[Logging Out](#)" on page 3-69.

3.2 Launching Oracle Mobile Field Service/Laptop

Complete this procedure to launch Oracle Mobile Field Service/Laptop. See "[Starting the Application](#)" on page 2-4 for additional details on this procedure.

1. Double click on the Web-to-Go icon in the system tray.
Your internet browser opens to the Oracle E-Business Suite login page.
2. Enter your user name and password.
3. Click **Go**.

Oracle Mobile Field Service/Laptop opens the Calendar page.

In order to receive new data assigned to you, such as new tasks and service requests, you need to synchronize with the enterprise system. Likewise, to send the changes that you make, such as creating debrief lines and updating task statuses, you need to synchronize with the enterprise system.

4. Establish a telephone / internet connection for your laptop computer.
5. Click the **Synchronize** button in the upper right corner of the page.

The information on your laptop computer is synchronized with the enterprise system. Synchronizing your data could take a few minutes, so do not abort the process. If the synchronization fails, contact your system administrator.

3.3 Using the Calendar Page

The Calendar tab is used to access the Calendar page, which contains the daily calendar of tasks assigned to you. The calendar gives you an immediate overview of all the tasks that need to be done for the day, along with pertinent task information.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there is a navigation bar with tabs for Home, Calendar, Information, and Messaging. Below the navigation bar is a search area with a 'Quick Find' dropdown set to 'Customer', a search input field, and a 'Go!' button. The main content area is titled 'Calendar: Daily View' and shows a calendar for '17-Jul-2002'. A table lists tasks with columns for Request, Scheduled, Travel Time, Customer, Task Name, Task Number, Product, and Status. The tasks are:

Request	Scheduled	Travel Time	Customer	Task Name	Task Number	Product	Status
10126	07:56		Business World 2 Hloh 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

Below the table, there are navigation links: 'First | Previous 1 - 3 of 3 Next | Last'. At the bottom, there are two buttons: 'Update' and 'Create Personal Task'.

The calendar shows scheduled task times and predicted task completion times, based on the job execution. The calendar defaults to the date of the oldest open task. For example, if a task from yesterday is still open, the calendar will display tasks from yesterday.

From the calendar, you can do the following:

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

3.3.1 Viewing and Opening Tasks

The Calendar page is your starting point for each day of work. From it, you can learn which customers you are scheduled to visit, what tasks you will perform at each site, and retrieve any additional information about the listed tasks.

Steps

To view and open a task, complete the following steps:

1. Click the Calendar tab to open the Calendar page.

The Daily View is the default view of the Calendar page.

Note: The Daily View of the Calendar page lists non-closed tasks in descending order based on the scheduled date and time stamp.

To view the calendar of tasks for another day, see "[Viewing a Past or Future Calendar](#)" on page 3-7.

The Calendar page, Daily View contains a table of tasks for the day. This table has multiple columns where you can access various task information.

2. From the Status drop-down list, select the status of the desired task.

The statuses are pre-defined. Some typical task statuses are Completed, Assigned, and Working.

3. Click **Update** to update your task calendar.

4. From the table, open the task by clicking one of the following:

- Request column—Click the desired service request number to view the service request details.

The Information page, Service Request Details view opens. See "[Viewing and Changing Service Request Information](#)" on page 3-15 for a complete description of this page.

- Customer column—Click the desired customer name to view more information about the customer, such as the name and address of the customer.

The Information page, Customer Details view opens. See "[Viewing Customer Information](#)" on page 3-9 for a complete description of this page.

- **Task Name column**—Click the desired task name to view a description of the task.

The Information page, Task Details view opens. See "[Viewing and Changing Task Information](#)" on page 3-25 for a complete description of this page.

- **Product column**—Click the desired customer product to view a description of the product.

The Information page, Search Results view opens. See "[Ordering a Part](#)" on page 3-55 for a complete description of this page.

The table also provides the following information:

- **Scheduled column**—Where you can view the task scheduled start time
- **Travel Time column**—Where you can view the calculated or default travel time.
- **Task Number column**—Where you can view the task number for a desired task.
- **Status column**—Where you can view and specify the current task status. To specify the current task status, access the status drop-down list for the desired task and then make the appropriate selection.

Set the status of the task and then click **Update** to save the status to the local database on your laptop computer. Choose a status from the following table:

Task Status	Description
Accepted	Assign this status to a task once you have viewed the calendar and are ready to work on the task.
Assigned	A task has this status when initially downloaded onto the laptop computer.
Cancelled	Assign this status to a task that has been cancelled.
Closed	Assign this status to a task that is now closed.
Completed	Assign this status to a task once you have completed a task.
Rejected	Assign this status to an assigned task that you are unable to accept.
Working	Assign this status to a task once you have started to work on the task.

Typically, the status for a task progresses in the following order:

- Upon initial download to the laptop computer, a task has a status of "Assigned".
- Once you review your schedule for the current day, change the status of "Assigned" tasks to "Accepted".
- Before you start working on an "Accepted" task, change its status to "Working".
- When you have successfully completed an "Accepted" task, change its status to "Completed".

3.3.2 Viewing a Past or Future Calendar

To view the calendar of tasks for another day, complete the following steps:

1. Click the calendar button in the upper right portion of the Calendar screen.

The calendar window opens.



2. Use the month and year drop-down lists to display the desired month and year.
3. Click on the desired date.

The calendar window closes and the selected date appears in the date field of Calendar page, Daily View.

To exit the calendar window without selecting a date, click **Cancel**. To exit the calendar window and clear the date field of Calendar page, Daily View, click **Clear**.

3.3.3 Creating a Personal Task

A *personal task* is a notice to the dispatcher that you will not be available for a particular time slot. A personal task is different from a task that is loaded onto your laptop, since it is not dispatchable or tied to a service request. For example, if you need to go to the dentist next week, you will create a personal task for it. This way, the dispatcher will know that you are not available during that time next week to service tasks.

Steps

To create a personal task, complete the following steps:

1. Click the Calendar tab to open the Calendar page.

The Daily View is the default view of the Calendar page.

2. Click **Create Personal Task**.

The Calendar page displays the Create Personal Task view.

3. From the Type and Status drop-down lists, select the appropriate information.
4. Complete the Name field with the appropriate information.

Note: The Type and Status drop-down lists are mandatory along with the Name field.

5. Complete or modify any other fields in this window.
6. Click **Create**.

Oracle Mobile Field Service/Laptop creates a personal task and then returns you to the Calendar: Daily View of the Calendar page.

3.4 Using the Information Page

The Information page is the central point for finding all the information about customers, service requests, and tasks. Whenever you request information from anywhere in the application, your request is linked to the Information page. This means that the Oracle Mobile Field Service/Laptop application will take you to the Information page when you search for information.

From the Information page, you can find information about the following:

- Customers
- Tasks
- Service requests
- Install base
- Inventory and order parts

From the Information page, you can also do the following:

- Create a service request
- Create a task
- Generate a report on tasks
- Print out service reports

3.4.1 Viewing Customer Information

Before you visit a customer site, you need to know the address and contact information.

You can obtain customer information from the following:

- The Information page
- The Calendar page, if a visit to that customer is scheduled (see "[Using the Calendar Page](#)" on page 3-4)
- Using the Quick Find function from the Home, Calendar, and Messaging pages (see "[Using the Quick Find Function](#)" on page 3-66)

This section describes how to use the Information page to obtain customer information.

Steps

Complete the following steps to view information about customers other than those who have a visit currently scheduled:

1. Click the **Information** tab to open the Information page.
2. From the **View** drop-down list, select **Customer**.
3. In the **Search** field, type the % wildcard character and then click **Go**.

Customers appear under the **Contents** heading, on the left side of the page.

If you know the customer for which you want to search, enter all or part of the customer name in the **Search** field. Use the % wildcard to represent one or more unknown characters.

To narrow the search to more specific criteria:

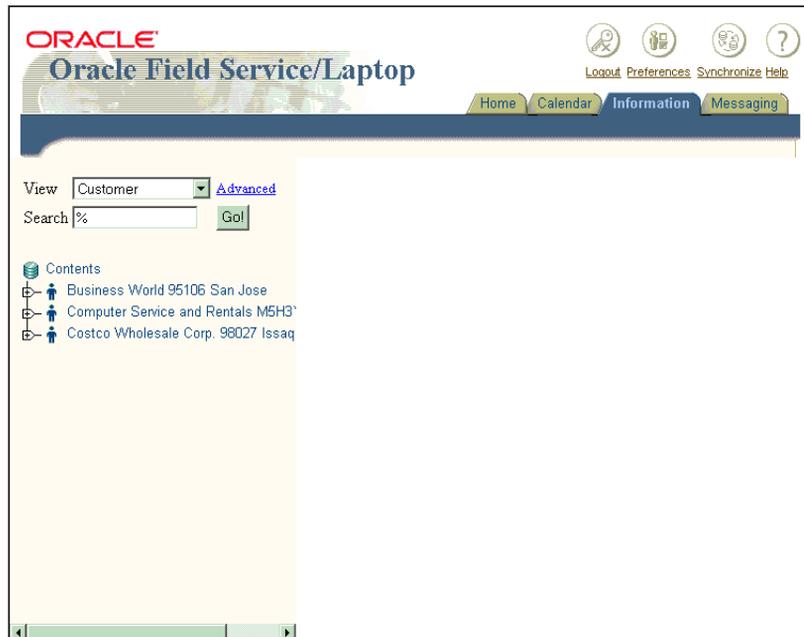
- From the **View** drop-down list, select **Customer** and then click **Advanced**.

Additional fields are displayed on which you can search.

- Complete one or more fields and then click **Search**.

Use the % wildcard to represent one or more unknown characters.

The customer or those matching the specified criteria appear under the **Contents** heading, on the left side of the page.



4. Click on the desired customer name.

The Information page displays the Customer Details view.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there is the Oracle logo and the title "Oracle Field Service/Laptop". Navigation tabs include Home, Calendar, Information (selected), and Messaging. A search bar is set to "View Customer" with a "Go!" button. The main content area is titled "Customer details" and shows "Party Name Business World" and "Party Number 1000". Below this is a "Customer locations" table with columns for Address, Postal Code, City, Country, and County. The table lists three locations: 8475 Elk Grove Road (New York, US), 15, rue Rene Coche (Paris, FR), and Eric Moulds (San Jose, US). A "Notes" button and a "Create Service Request" button are visible at the bottom of the table.

Address	Postal Code	City	Country	County
8475 Elk Grove Road	10292	New York	US	New York
15, rue Rene Coche	92174	Paris	FR	
Eric Moulds	95106	San Jose	US	

The Information page, Customer Details view displays the customer information, including contact information and any flexfields that are set up.

5. Click **Notes** to view existing customer notes or to add a new customer note.

See "[Creating and Viewing Notes](#)" on page 3-30 for a complete description of this procedure.

3.4.2 Viewing Install Base Information

Oracle Mobile Field Service/Laptop enables you to view the location and product details for a customer product. In addition, you are able to view and add customer product notes.

Steps

Complete the following steps to view install base information:

1. Click the Information tab to open the Information page.
2. From the View drop-down list, select **Customer Product**.
3. In the Search field, type the % wildcard character and then click **Go**.

Customer products appear under the Contents heading, on the left side of the page.

If you know the customer product for which you want to search, enter all or part of the customer product name in the Search field. Use the % wildcard to represent one or more unknown characters.

To narrow the search to more specific criteria:

- From the View drop-down list, select **Customer Product** and then click **Advanced**.

Additional fields are displayed on which you can search.

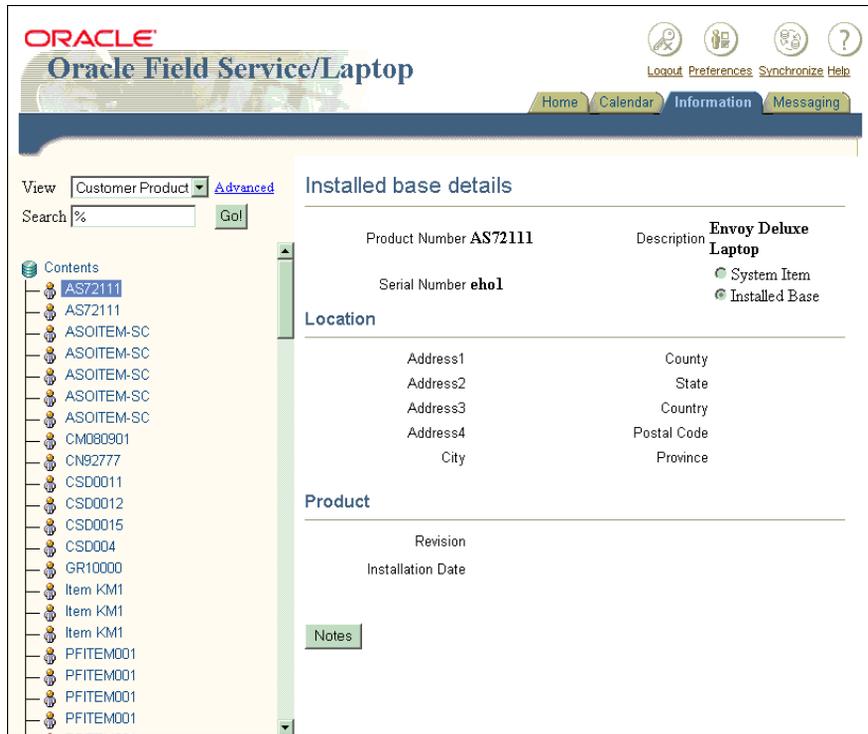
- Complete one or more fields and then click **Search**.

Use the % wildcard to represent one or more unknown characters.

The desired customer product or those matching the specified criteria appear under the Contents heading, on the left side of the page.

4. Click on the desired customer product.

The Information page displays the Installed Base Details view.



5. Click **Notes** to view existing customer product notes or to add a new customer product note.

See ["Creating and Viewing Notes"](#) on page 3-30 for a complete description of this procedure.

3.4.3 Working with Service Requests

A service request is created when a customer contacts your organization with a problem. Typically, the customer representative analyzes the service request and assigns a task or tasks to it. Then the service request, along with all related information and tasks, are sent to field service representative. You can view the summary details of a service request in the calendar of the Calendar page. See ["Viewing and Opening Tasks"](#) on page 3-5 for a complete description of this procedure.

Note: The field service representative can create a service request when necessary.

This section describes how to create, view, and change a service request. A service request contains the following groups of information:

- General
- Contact
- Product
- Service request
- Credit card

3.4.3.1 Viewing and Changing Service Request Information

The service request contains practical information, including the problem and likely resolution.

Steps

Complete the following steps to view service request information:

1. Click the Information tab to open the Information page.
2. From the View drop-down list, select **Service Request**.
3. In the Search field, type the % wildcard character and then click **Go**.

Service requests appear under the Contents heading, on the left side of the page.

If you know the service request for which you want to search, enter all or part of the service request name in the Search field. Use the % wildcard to represent one or more unknown characters.

To narrow the search to more specific criteria:

- From the View drop-down list, select **Service Request** and then click **Advanced**.

Additional fields are displayed on which you can search.

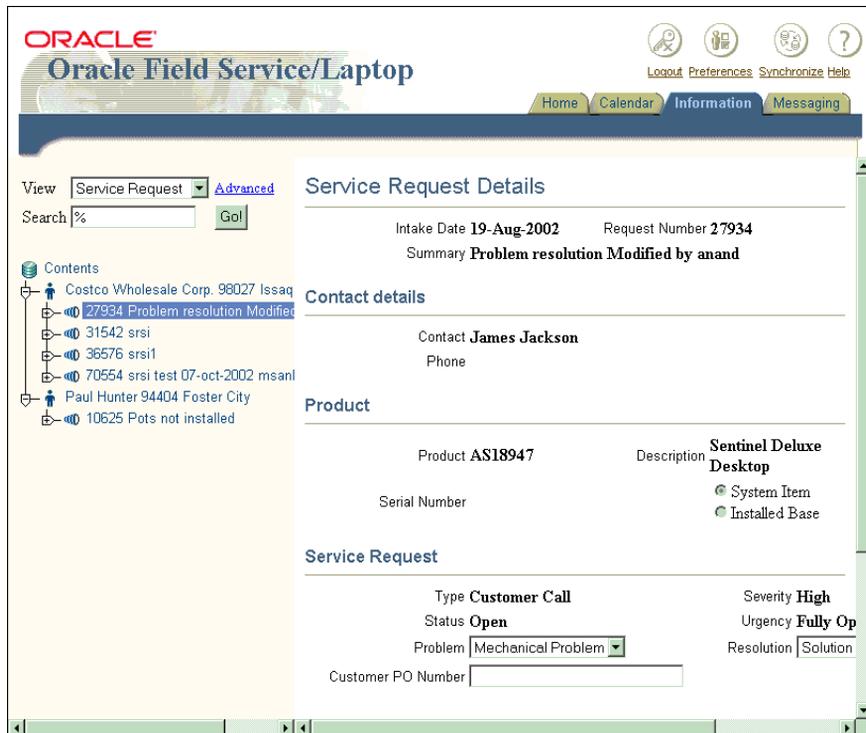
- Complete one or more fields and then click **Search**.

Use the % wildcard to represent one or more unknown characters.

The desired service request or those matching the specified criteria appear under the Contents heading, on the left side of the page.

4. Click on the name of the desired service request.

The Information page displays the Service Request Details view for the selected service request.



5. Under the Service Request header, you can enter or change information for the following:
 - Problem drop-down list—make a selection that describes the task problem.
 - Resolution drop-down list—make a selection that describes the task solution.
 - Customer PO Number field—enter the customer purchase order number in this field.
 - Flexfields—if these fields are set up, complete them according to your needs.

To complete credit card information, see "[Viewing and Entering Credit Card Information](#)" on page 3-21.

To create a service request note, click **Note**. See "[Creating and Viewing Notes](#)" on page 3-30 for a complete description of this procedure.

To create a task, click **Create Task**. See "[Creating a Task](#)" on page 3-27 for a complete description of this procedure.

To view the service history, click **Service History**. See "[Viewing Service History](#)" on page 3-23 for a complete description of this procedure.

3.4.3.2 Creating a Service Request

When you are at a customer site, the customer may have an additional request. As an additional service, you can create a service request for this customer.

You can create a service request for each of the following scenarios:

- Without having any product information
- With a system item
- With a known customer product (install base)

The service request contains the following detailed information:

- Request status
- Type
- Severity
- Urgency
- Problem resolution
- Customer product involved
- Installation address
- A summary of the problem or reason for request

There are two ways you can create a service request for a customer:

- Based on an existing service request which serves as a template
- Based on no existing service requests where you have to enter all the necessary information

Steps

To create a service request, complete the following steps:

1. Click the Information tab to open the Information page.

As an alternative, you can click on the task number of the desired service request in the Calendar page. This action will take you to the Information page with service request information displayed for the desired task.

2. Choose the desired customer for which you want to create a service request.

See "[Viewing Customer Information](#)" on page 3-15 for a complete description of this procedure.

3. Click **Create Service Request**.

The Information page displays the Create Service Request view.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there's a navigation bar with 'Home', 'Calendar', 'Information' (selected), and 'Messaging'. Below this is a search bar with 'View: Customer' and 'Advanced' options. The main content area is titled 'Create Service Request' and contains a form with the following fields and values:

- Use the following request as template: [Dropdown]
- Party Name: **Costco Wholesale Corp.** Party Number: **1280**
- Caller Type: **ORGANIZATION**
- Request Date: **07-Nov-2002** Request Number: [Text Box]
- *Type: **Customer Call** *Severity: **High**
- *Status: **Open** Urgency: **Partially Operable**
- Problem: [Dropdown] Resolution: [Text Box]
- PO Number: [Text Box]
- *Summary: [Text Box]
- Install Base Product
- Product: [Text Box] **Find** Description: [Text Box]
- Serial Number: [Text Box] Installation Date: [Text Box]
- Install Address: [Text Box]

The left sidebar shows a 'Contents' tree with 'Costco Wholesale Corp. 98027 Issac' selected.

To populate all the fields of the Create Service Request view based on an existing template, select a template from the Use the following task as template

drop-down list. After you make this selection, you are able to change any field you want in the Create Service Request view.

4. If you are not satisfied with the defaults of the Type, Status, Severity, and Urgency drop-down lists, then make different selections.

Note: The Type, Status, and Severity drop-down lists are mandatory along with the Summary field.

5. Complete the Summary field with the appropriate information.
6. Complete any other fields in the Create Service Request view.

If the product is known, then select the Install Base Product check box and specify the product in the Product field.

7. Click **Create**.

The Information page displays the Service Request Details view. See "[Viewing and Changing Service Request Information](#)" on page 3-15 for a complete description of this page.

3.4.3.3 Viewing Contractual Information

Before starting a task, a field service representative should have as many details about the customer and task as possible. Part of these details is the contractual information. The field service representative uses this information to determine the following:

- Customer entitlements
- Contract coverage

Oracle Mobile Field Service/Laptop displays contractual information in a table format that you can reference for transaction billing types.

Steps

Complete the following steps to view contractual information:

1. Click the Information tab to open the Information page.
2. Choose the desired service request for which you want contractual information.

See "[Viewing and Changing Service Request Information](#)" on page 3-15 for a complete description of this procedure.

- Under the Contents heading, click the "+" button to the left of the desired service request.

The task(s), field service request report, customer product(s), and contract are listed below the service request.

- Click on the contract.

The Information page displays the Contract Line Details view.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there is the Oracle logo and the page title "Oracle Field Service/Laptop". Navigation tabs include Home, Calendar, Information (selected), and Messaging. A search bar is present with a "Go!" button. On the left, a "Contents" tree shows a hierarchy of folders and reports, with "10866 Extended Notebook PC" selected. The main content area is titled "Contract line details" and displays the following information:

- Contract number: **10866**
- Service name: **Extended Notebook PC Service Program**
- Service description: **WR23763**
- *Business process: **Field Service** (dropdown menu)

Below this information is a section titled "Transaction billing types" which contains a table:

Name	Up to amount	UOM	% Covered
Loaner	100000	USD	10
Labor Transaction	100000	USD	100
Expense Transaction	100000	USD	100
Return Repaired	100000	USD	10
Estimate Repair	100000	USD	100
Labor Transaction	100000	USD	100
Return Loaner	100000	USD	90
Return for Repair	100000	USD	90

The contract number appears in the Contract number field and the type of service covered by the contract appears in the Service name field. The service description code appears in the Service description field.

- To change a business process, make a selection from the Business process drop-down list.

Under the Transaction Billing Types header is a table that describes each aspect of the contract. The contents of this table are determined by the business process that you select in the Business process drop-down list.

For example, you could have an Extended Notebook PC Service Program that covers eight transaction billing types, each with a maximum amount of \$100,000. The percent of the money covered by the service organization varies from transaction billing type. For instance, a loaner notebook computer can

be provided under a Loaner transaction billing type with 10% coverage, so the service organization would be only responsible for 10% of the cost. If there was a repair estimate, then an Estimate Repair transaction billing type with 100% coverage could apply, and the service organization would be not be responsible for any cost.

3.4.3.4 Viewing and Entering Credit Card Information

Oracle Mobile Field Service/Laptop enables you to record or update the following credit card information from the customer point-of-service:

- Credit card number
- Expiration date
- Credit card type
- Customer name

With this information saved, you do not have to re-enter it. The credit card information is encrypted so it is secure. Only the last four digits of the credit card number is visible in the application.

When you synchronize with the enterprise system, the credit card information is validated. See "[Synchronizing with the Enterprise System](#)" on page 3-67 for a complete description of this procedure.

Note: The credit card feature is set in a profile. Consult your field service administrator on the use of this feature.

Steps

Complete the following steps to view and enter credit card information:

1. Click the Information tab to open the Information page.
2. Choose the desired service request for which you want credit card information.

See "[Viewing and Changing Service Request Information](#)" on page 3-15 for a complete description of this procedure.

At the bottom of the Information page, Service Request Details view is the credit card information.

The screenshot displays the Oracle Field Service/Laptop interface. At the top, the Oracle logo and "Oracle Field Service/Laptop" title are visible. Navigation tabs include Home, Calendar, Information, and Messaging. The main form area shows a "Customer Call" with the following details:

- Type: Customer Call
- Status: Open
- Severity: High
- Urgency: Fully Operable
- Problem: Mechanical Problem
- Resolution: Solution to Mechanical
- Customer PO Number: [Empty field]
- *Steve's Flexfield_5, *_4, *_3, *_2, *_1: [Five empty text input fields]
- Daves Flexfield: [Empty text input field]
- Test dff field: [Empty text input field]

Below the main form is the "Credit Card details" section with the following fields:

- Credit Card Number: [Empty text input field]
- New Credit Card Number: [Empty text input field]
- Credit Card Type: [Dropdown menu]
- Expiration Date: [Two dropdown menus]
- First Name: [Empty text input field]
- Last Name: [Empty text input field]
- Middle Name: [Empty text input field]

At the bottom of the form are buttons for "Notes", "Save", "Create Task", and "Service History". On the left side, there is a "Contents" tree view showing a hierarchy of service requests, with "27934 Problem resolution Modified" selected.

3. To record a customer's credit card information, complete the desired fields and drop-down lists under the Credit Card Details header.

If the customer's credit card information has already been entered, you can edit this information by making changes in the desired field(s) and drop-down list(s). The credit card information should be validated to ensure that the credit card number provided by the customer is a valid.

4. Click **Save**.

To create a service request note, click **Note**. See "[Creating and Viewing Notes](#)" on page 3-30 for a complete description of this procedure.

To create a task, click **Create Task**. See "[Creating a Task](#)" on page 3-27 for a complete description of this procedure.

To view service history, click **Service History**. See "[Viewing Service History](#)" on page 3-23 for a complete description of this procedure.

3.4.3.5 Viewing Service History

To best service the customer, the field service representative should review the customer's service history prior to making a customer visit. You can request service history for either a customer or a customer product. Only tasks and service requests that are closed or completed can appear in the service history. The amount of service history gathered for a customer is determined in customer setup. Here, the administrator determines how many service requests will be used to create the service history. For example, the last three service requests may be compiled to create the service history.

Service history includes the following:

- Customer and contact details
- Product details (item or install base)
- Service request and task assignment details
- Reported time, material(s), and expenses for each customer visit
- Field service representative(s) who visited the customer previously

Steps

Complete the following steps to view service history:

1. Click the Information tab to open the Information page.
2. Choose the desired service request for which you want to view service history.
See "[Viewing and Changing Service Request Information](#)" on page 3-15 for a complete description of this procedure.
3. Click **Service History** at the bottom of the Information page, Service Request Details view.

The Information page displays the Service History view.

The screenshot displays the Oracle Field Service/Laptop web application. The header includes the Oracle logo and the title "Oracle Field Service/Laptop". Navigation tabs for Home, Calendar, Information, and Messaging are visible. The main content area is divided into sections:

- View:** A dropdown menu set to "Service Request" with an "Advanced" link.
- Search:** A text input field containing "110020" and a "Go!" button.
- Contents:** A sidebar menu with "Business World 95106 SAN JOSE" and a sub-item "110020 srb 1 b lap".
- Service History:** A section displaying customer information:
 - Name: **Business World**
 - Address: **2391 L STREET**
 - City: **SAN JOSE**
 - Contact: **Andre Beaulie**
 - Postal Code: **95106**
 - Phone: (field is empty)
- Previous Requests:** A table listing historical requests with columns for Intake Date, Request, Product, Serial, Problem, Resolution, and Details.

Intake Date	Request	Product	Serial	Problem	Resolution	Details
11-Jan-2003	106022	QP-LPTR-103		qa problem code 1	qa resolution code 1	
11-Jan-2003	106420	QP-LPTR-103		qa problem code 1	qa resolution code 1	
11-Jan-2003	106422	QP-LPTR-103		qa problem code 1	qa resolution code 1	
17-Jan-2003	108420	QP-LPTR-103		qa problem code 1	qa resolution code 1	
17-Jan-2003	108422	QP-LPTR-103		qa problem code 1	qa resolution code 1	

Navigation links for the previous requests table include "First | Previous 1 - 5 of 5 Next | Last". A "Close" button is located below the table.

3.4.4 Working with Tasks

A *task* is a unit of work within the service request. A task is created during field service request screening and qualification in the office, or when working out in the field. A task is related to a specific problem that needs to be resolved through a service request.

Update task status in order to keep your schedule up to date and to inform the dispatcher on the progress of your schedule. See "[Viewing and Opening Tasks](#)" on page 3-5 for a complete description of this procedure.

Oracle Mobile Field Service/Laptop enables you to view and change existing tasks and to create new ones.

3.4.4.1 Viewing and Changing Task Information

For a task assigned to you, you need to retrieve information such as what is the problem and what parts and materials are needed.

You can request task data from the following:

- The Information page
- Your daily calendar, if a visit to that customer is scheduled (see "[Using the Calendar Page](#)" on page 3-4)
- Using the Quick Find function from the Home, Calendar, and Messaging pages (see "[Using the Quick Find Function](#)" on page 3-66)

This section describes how to view and change task information.

Steps

Complete the following steps to see information about any task, not just those that are scheduled:

1. Click the Information tab to open the Information page.
2. From the View drop-down list, select **Task**.
3. In the Search field, type the % wildcard character and then click **Go**.

For each customer, the service requests and tasks appear under the Contents heading, on the left side of the page.

If you know the task for which you want to search, enter all or part of the task name in the Search field. Use the % wildcard to represent one or more unknown characters.

To narrow the search to more specific criteria:

- From the View drop-down list, select **Task** and then click **Advanced**.

Additional fields are displayed on which you can search.

- Complete one or more fields and then click **Search**.

Use the % wildcard to represent one or more unknown characters.

The desired task or those matching the specified criteria appear under the Contents heading.

4. Click on the desired task to view the task details.

The Information page displays the Task Details view, which contains information about the selected task.

The screenshot shows the Oracle Field Service/Laptop interface. The top navigation bar includes 'Home', 'Calendar', 'Information', and 'Messaging'. The 'Information' tab is active. On the left, a tree view shows a hierarchy of tasks, with '19583 task1' selected. The main area displays the 'Task Details' for this task.

Task Details

Task Number **19583** Escalated

Name **task1**

Location

Address1 **PO Box 34331** County **Bill**
 Address2 State **WA**
 Address3 Country **US**
 Address4 Zip code **98027**
 City **Issaquah** Province

Task

Task Type **Dispatch** Task Status **Complete**

Planned Start Date **19-Aug-2002** 19:00 Priority **Low**
 Planned End Date **19-Aug-2002** 22:00 *Planned Effort **3** Hour

Scheduled Start Date **20-Aug-2002** 05:00
 Scheduled End Date **20-Aug-2002** 07:00

Task Assignment

*Assignment Status **Completed** Travel Time

If the task was escalated at the enterprise system, then the Escalated check box is selected.

- Under the Task header, ensure that the values in the fields and drop-down lists are correct.

The Planned Start Date and Planned End Date fields show the task start-and-end period according to the contract agreement. See "[Viewing Contractual Information](#)" on page 3-19 for complete contract details.

Depending on the business scenario your system administrator has chosen, you can enter the time that the visit is likely to take place in the Scheduled Start Date and Scheduled End Date fields. The actual start and end times for a task are listed in the time report. See "[Creating a Time Report](#)" on page 3-33 for the actual time reporting.

Depending on the business scenario your system administrator has implemented, you may or may not be able to change the value in the Planned Effort field.

If flexfields are set up, change or complete them according to your needs.

6. Under the Task Assignment header, ensure that the selection in the Assignment Status drop-down list is correct.
7. Click **Notes** to view existing task notes or to add a new task note.
See "[Creating and Viewing Notes](#)" on page 3-30 for a complete description of this procedure.
8. To save any changes to the task, click **Update**.
Click **Restore** to return the original values to the Task Details view.

3.4.4.2 Creating a Task

There may be times when you need to create a new or additional task for a service request. For example, if you cannot complete a task or need support from a fellow field service representative, then you should create an additional task.

There are two ways you can create a task:

- Based on an existing task which serves as a template
- Based on no existing task where you have to complete all the desired fields

Prerequisites

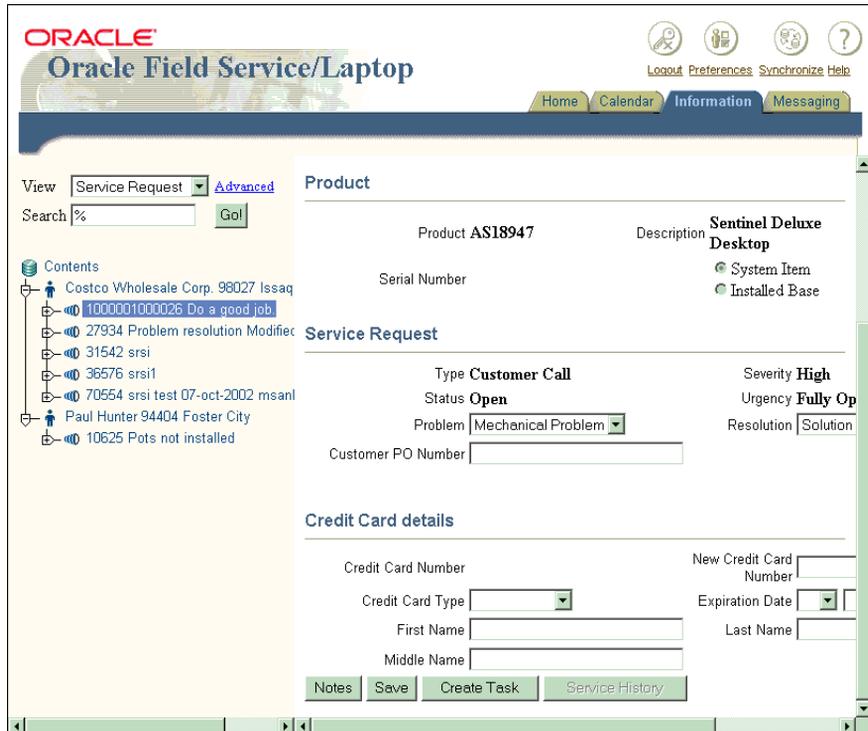
A service request must already exist.

Steps

Complete the following steps to create a task:

1. Click the Information tab to open the Information page.
2. Choose the customer for which you want to create a task.
See "[Viewing Customer Information](#)" on page 3-15 for a complete description of this procedure.
3. Under the Contents heading, click the "+" button to the left of a customer name to view service requests for the customer.
4. Click the service request for which you want to create a task.

The Information page displays the Service Request Details view.



- To specify the cause of the service request, select an item from the Problem drop-down list under the Service Request header.
 - To specify the solution for the service request, select an item from the Resolution drop-down list under the Service Request header.
 - Click **Save** to save the update.
5. Click **Create Task** at the bottom of the Service Request Details view.

The Information page displays the Create Task view.

Note: To populate all the fields of the Create Task view based on an existing template, select a template from the Use the following task as template drop-down list. After you make this selection, you are still able to change any fields that you want in the Create Task view.

6. Select the appropriate information from the Type and Status drop-down lists.
7. Enter the task name in the Name field.

Note: The Type and Status drop-down lists are mandatory along with the Name field.

8. Complete or modify any other fields in this page.

9. Click **Create**.

The Information page displays the Task Details view for the new task. The new task also appears under the service request, on the left side of the page. See ["Viewing and Changing Task Information"](#) on page 3-25 for a complete description of this page.

3.4.5 Creating and Viewing Notes

You can create and view notes for the following:

- Customer
- Customer product
- Service request
- Task

For example, you may note that a power supply has to be replaced by a refurbished one.

A note includes the following:

- Note text
- Current date
- Note type
- Note status

Complete the following steps to create and view a note:

1. Open the appropriate page.
 - To create and view a service request note, open the Information page, Service Request Details view.
See ["Viewing and Changing Service Request Information"](#) on page 3-15 for a complete description of this procedure.
 - To create and view a task note, open the Information page, Task Details view.
See ["Viewing and Changing Task Information"](#) on page 3-25 for a complete description of this procedure.
 - To create and view a customer note, open the Information page, Customer Details view.

See "[Viewing Customer Information](#)" on page 3-9 for a complete description of this procedure.

- To create and view a customer product note, open the Information page, Installed Base Details view.

See "[Viewing Install Base Information](#)" on page 3-12 for a complete description of this procedure.

2. To view any existing notes or to add a new note, click **Notes**.

A window opens, divide into a Notes section and a Note details section. The Notes section lists all the notes for the entity in question. The Note details section shows the date of note creation and the note author.

Notes

Date	Source	Note	Entered by	Note type	Status
06-Nov-2002	Party	customer note 2 b pa	Armstrong, Mr. Billie Joe	qa note type 1	Public
06-Nov-2002	Party	customer note 1 b pa	Qasemgr, Steve	qa note type 1	Public
06-Nov-2002	Party	customer note 2 b la	Manjrekar, Sanjay	qa note type 1	Public

[First](#) | [Previous](#) 1 - 3 of 82 [Next](#) | [Last](#)

Note details

Date	Entered by	Source
Note type	Note status	
<div style="border: 1px solid black; padding: 5px;"> Note </div>		
<input type="button" value="Add note"/> <input type="button" value="Close"/>		

When you click on a note listed in the Notes section, the note text appears in the Note field of the Note details section.

3. To create a new note, click **Add note**.

A new Notes window opens.

Notes

Date	Source	Note	Entered by	Note type	Status
06-Nov-2002	Party	customer note 2 b pa	Armstrong, Mr. Billie Joe	qa note type 1	Public
06-Nov-2002	Party	customer note 1 b pa	Qasermgr, Steve	qa note type 1	Public
06-Nov-2002	Party	customer note 2 b la	Manjrekar, Sanjay	qa note type 1	Public

First | Previous 1 - 3 of 82 [Next](#) | [Last](#)

Note details

Date **07-Nov-2002** Entered by **Sanko, Mike** Source **Party**

*Note type *Note status

Note

- From the Note type drop-down list, select the note type.

Note: For a note to appear on a customer invoice, the note type must be "Invoice".

- From the Note status drop-down list, select the not status.
- In the Note field, enter the note text.
- Click **Save**.

Oracle Mobile Field Service/Laptop opens a new, blank Notes window where you can add another note.

The next time you synchronize with the enterprise system, the saved note is added.

- Add another note as described above or click **Close** to close the Notes window.

3.4.6 Debrief Reporting

After you complete a task, you can report the following information:

- Time Describes how much time a task took to complete.

- **Materials** Describes what materials were involved in the completion of a task. This includes both replacement and recovered parts. This information is used by the home office to replenish part inventories.
- **Expenses** Describes the expenses required to complete a task.

Once the field service representative records any or all of the above information, he can then upload this information to the enterprise system by synchronizing Oracle Mobile Field Service/Laptop. With this information now in the enterprise system, the home office can review and update the customer install base, spare parts inventory, and billing information.

3.4.6.1 Creating a Time Report

When you have completed a task, enter the amount of time the task took to complete along with other related information.

Note: The actual times are determined when the field service representative sets a task assignment status to "Working" or "Closed." See "[Viewing and Changing Task Information](#)" on page 3-25 for a complete description of this procedure.

Oracle Mobile Field Service/Laptop uses the labor times that you enter to calculate the actual times. If there are no reported labor times, the application uses the time status change time stamp.

Steps

Complete the following steps to create a time report:

1. Click the Information tab to open the Information page.
2. Choose the desired task for which you want to create a time report.
See "[Viewing and Changing Task Information](#)" on page 3-25 for a complete description of this procedure.
3. Under the Contents heading, click the "+" button to the left of the desired task.
All the reports for the task are listed, including the time report.
4. Select **Time Reporting**.
The Information page opens the Time Reporting view.

Oracle Field Service/Laptop

Home Calendar Information Messaging

View: Task [Advanced](#)

Search: %

Contents

- Business World 95106 San Jose
 - 1000010000005 This is a test
 - 1000016000005 3/6 YL online SR#1
 - Field Service Request Repo
 - NVidia GeForce 2MX
 - 1000017000005 Another Test
 - 1000021000005 Wiring
 - Time reporting
 - Material reporting
 - Expense reporting
 - Field Service Task Repo
 - 1000013000005 This is Mike's test
 - 1000019000005 Another Test
 - Field Service Request Repo
 - NVidia GeForce 2MX
 - 8675 YL online SR#1

Time Reporting

New Labor Lines

*Business Process: Field Service

*Labor Type: Labor Transaction

*Labor Item: Labor Charges for Ser

Starting Mileage:

Ending Mileage:

*Start Time: 12-Aug-2002

*End Time: 12-Aug-2002

Added Labor Lines

Business Process	Labor Type	Labor Item	Time Begin	Time End	Starting Mileage	Ending Mileage
First Previous 0 - 0 of 0 Next Last						

Note: The Business Process, Labor Type, and Labor Item drop-down lists are mandatory along with Start Time and End Time fields.

5. From the Business Process drop-down list, select a business process.
6. From the Labor type drop-down list, select a labor type.
7. From the Labor item drop-down list, select a labor item.
8. Specify a task start time:
 - Click the calendar button near the Start Time field and then select the task start date.
For a complete description of this procedure, see "[Viewing a Past or Future Calendar](#)" on page 3-7.
 - From the hour and minutes drop-down lists, select the time you started a task.

The hour drop-down list provides values for the 24-hour clock format. If you are selecting a time after 12:00 P.M., add twelve to the hour to get the 24-hour clock equivalent. For example, 4:30 P.M. would be entered as 16 hours and 30 minutes.

9. Specify a task start time:

- Click the calendar button near the End Time field and then select the task end date.

For a complete description of this procedure, see "[Viewing a Past or Future Calendar](#)" on page 3-7.

- From the hour and minutes drop-down lists, select the time you ended a task.

Again, the hour drop-down list provides values for the 24-hour clock format.

10. In the Starting Mileage field, enter the mileage that is on your vehicle prior to the customer visit.

Completing the Starting Mileage field is optional.

11. In the Ending Mileage field, enter the mileage that is on your vehicle after you arrive at the customer site

Completing the Ending Mileage field is optional.

12. Click **Add**.

The time report is saved to your laptop computer.

In the table under Added Labor Lines, you can see a summary of the labor lines that have already been reported.

3.4.6.2 Creating a Material Report

After you complete a task, you can record what materials were used in the completion of the task. The home office uses this information to replenish or replace needed materials, maintain the customers install base, and possibly invoice the customer for the materials used.

Initially, one item is associated with a service request. This can be an item from a customer's install base or an item from an inventory. One or more tasks are created for this service request and you can create a material report for each task. If multiple field service representatives are assigned to a task, then you can create multiple

material reports for a task. You can also report several transactions in a material report. For each material transaction, a separate line is created in the report.

Steps

Complete the following steps to create a report for the materials that you used to complete a task:

1. Click the Information tab to open the Information page.
2. Choose the desired task for which you want to create a material report.
See "[Viewing and Changing Task Information](#)" on page 3-25 for a complete description of this procedure.
3. Under the Contents heading, click the "+" button to the left of the desired task.
All the reports for the task are listed, including the material report.
4. Select **Material reporting**.

The Information page displays the Material Reporting view.



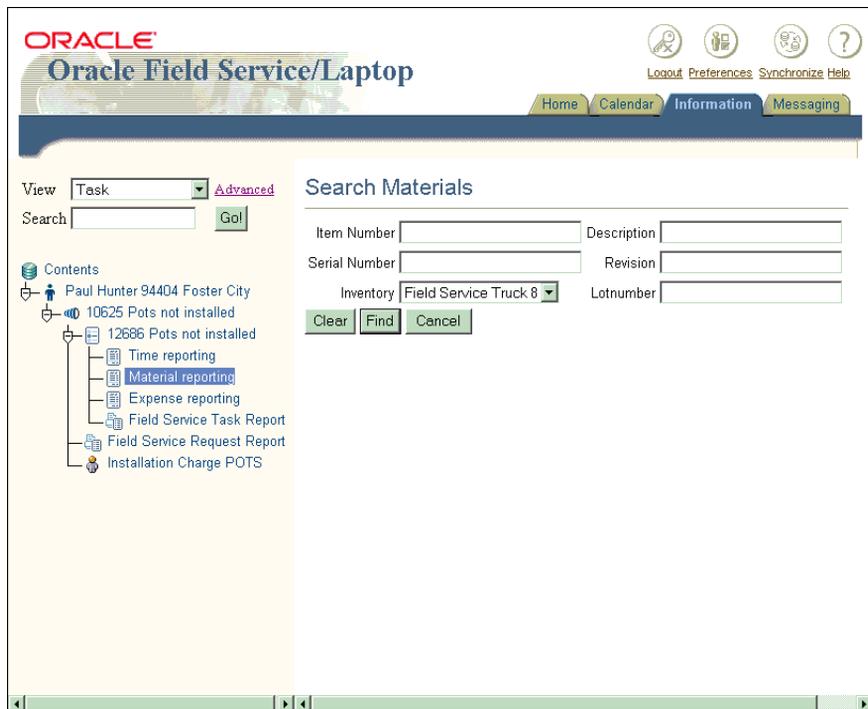
5. To create a new report, select a value from the Business Process drop-down list and Transaction Type drop-down list and then click **Add**.

The Information page displays the Material Transaction view. There are two versions of this view: one for used parts and the other for recovered parts.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there is a navigation bar with tabs for Home, Calendar, Information, and Messaging. The Information tab is selected. Below the navigation bar, there is a search area with a 'View' dropdown set to 'Task' and a 'Search' input field with a 'Go!' button. A 'Contents' sidebar on the left lists various reports, with 'Material reporting' highlighted. The main content area is titled 'Material Transaction' and shows a table with columns for 'Item' (Serial Number, Inventory) and 'Description' (Quantity, UOM). There are 'Find', 'Cancel', and 'Ok' buttons at the bottom right of the table area.

6. Click **Find** to search on materials.

The Information page displays the Search Materials view.



7. Click **Find** without completing any fields or the drop-down list.

Under the Search Results header, the Information page, Search Materials view displays all the possible parts for the task.

ORACLE
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View: Task [Advanced](#)

Search:

Contents

- Paul Hunter 94404 Foster City
 - 10625 Pots not installed
 - 12686 Pots not installed
 - Time reporting
 - Material reporting**
 - Expense reporting
 - Field Service Task Report
 - Field Service Request Report
 - Installation Charge POTS

Search Materials

Item Number: Description:

Serial Number: Revision:

Inventory: Lotnumber:

Search results

Item	Description	Serial Number	Quantity	UOM	Inventory	Insta
AS18947	GP405 MACHINE		50	Each	Field Service Truck 8 5047	
AS54888	Sentinel Standard Desktop		50	Each	Field Service Truck 8 5045	
AS92689	Envoy Standard Laptop		50	Each	Field Service Truck 8 5046	
CM89108	Power / Recharging Unit		19	Each	Field Service Truck 8 5063	

First | Previous 1 - 4 of 4 Next | Last

If you know information about the desired part and would like to limit your search:

- Complete any of the fields and the drop-down list in the Information page, Search Materials view.

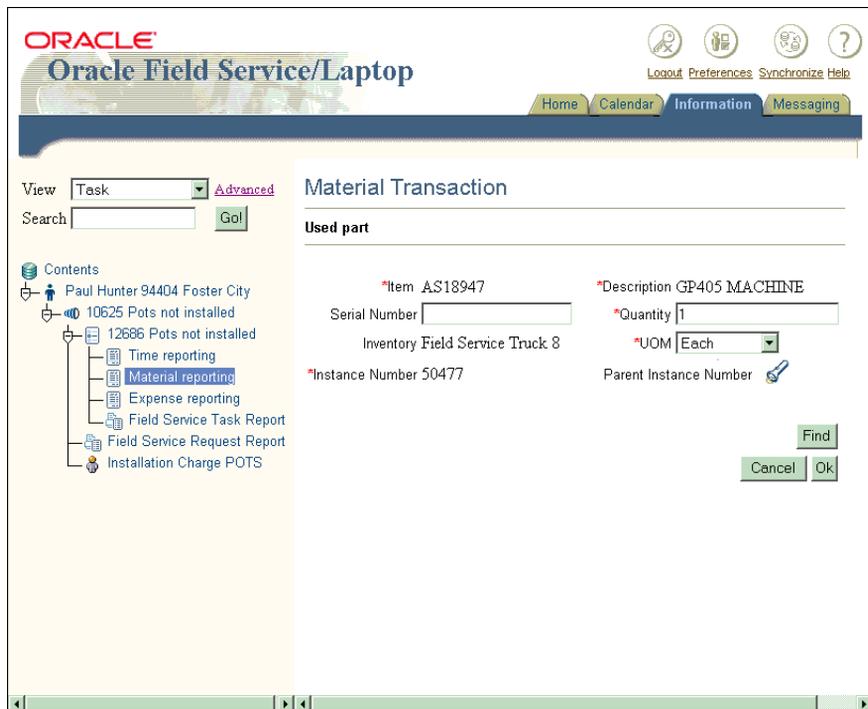
These fields are self-explanatory.

- Click **Find**.

The Information page, Search Materials view displays the part(s) for the task under the Search Results header.

- Under the Search Results header, select the desired part.

The Information page, Material Transaction view displays the selected part.



9. Click **OK** to add the selected part to the material report.

The Information page, Material Reporting view displays the part, along with a detailed description in a table under the Summary of Reported Materials header.

The screenshot displays the Oracle Field Service/Laptop web application. The top navigation bar includes the Oracle logo, the title "Oracle Field Service/Laptop", and utility links for Logout, Preferences, Synchronize, and Help. Below this are tabs for Home, Calendar, Information (selected), and Messaging. The main content area is titled "Material Reporting" and features a "View" dropdown set to "Task" and a "Search" field with a "Go!" button. On the left, a "Contents" sidebar lists tasks, with "12686 POTS not installed" expanded to show sub-items: "Time reporting", "Material reporting" (highlighted), "Expense reporting", "Field Service Task Report", "Field Service Request Report", and "Installation Charge POTS". The main area contains a "New Material Transaction" section with dropdowns for "Business Process" (Field Service) and "Transaction Type" (Material Transaction), and an "Add" button. Below this is a "Summary of reported materials" table:

Status	Transaction Type	Product	Description	Inventory	Quantity	UOM
Used	Material Transaction	AS18947	GP405 MACHINE FS_Truck8	3		Each

Navigation links at the bottom of the table include "First | Previous 1 - 1 of 1 Next | Last".

3.4.6.3 Creating an Expense Report

After you complete a task, you can then enter information that describes the expenses associated with that task. Expenses may include such things as a meal and driving costs.

Steps

Complete the following steps to generate a report for the expenses associated with a task:

1. Click the Information tab to open the Information page.
2. Choose the desired task for which you want to create an expense report.
See "[Viewing and Changing Task Information](#)" on page 3-25 for a complete description of this procedure.
3. Under the Contents heading, click the "+" button to the left of the desired task.
All the reports for the task are listed, including the expense report.

4. Click **Expense reporting**.

A summary of the expenses incurred for this task appears.

The screenshot displays the Oracle Field Service/Laptop interface. The top navigation bar includes 'Home', 'Calendar', 'Information', and 'Messaging'. The 'Expense Reporting' section is active, showing a 'New Expense Lines' form. The form includes the following fields:

- Business Process:** Field Service
- *Expense Type:** Expense Transaction
- *Expense Item:** Expense Charge fo
- Quantity:** [Empty field]
- *UOM:** Dollars
- Cost:** [Empty field]
- *Currency:** ANY Currency

Below the form is an 'Add' button and an 'Added Expense Lines' table. The table has the following columns: Business Process, Expense Type, Expense Item, Quantity, UOM, Cost, and Currency. The table currently contains one row with the following data:

Business Process	Expense Type	Expense Item	Quantity	UOM	Cost	Currency
Field Service	Expense Transaction	Expense Charge fo	0	Dollars	0	ANY Currency

5. To make a new expense report, enter the following information under **New Expense Lines** header:

- From the **Business Process** drop-down list, select the business process that describes the completed task.
- From the **Expense Type** drop-down list, select the type of expense incurred while completing the task.
- In the **Expense Item** drop-down list, select the item that is being expensed in the expense report.
- Specify the cost and currency that describes the expense.

The **Cost** field and **Currency** drop-down list are used together while the **Quantity** field and **UOM** drop-down list are paired together. In your description, only complete *one* of these field-and-drop-down list combinations.

- In the **Cost** field, enter the cost of completing the task.

- In the Currency drop-down list, ensure that the default currency is correct. If necessary, change it to the correct currency.

Complete the Quantity field and UOM drop-down list if the pricing amount is unknown.

Note: The Business Process, Expense Type, and Expense Item drop-down lists are mandatory.

6. Click Add.

The Information page, Expense Reporting view displays the expense, along with a detailed description in a table under the Added Expense Lines header.

Oracle Field Service/Laptop

View: [Advanced](#)

Search:

Contents

- Costco Wholesale Corp. 98027 Issaq
- Paul Hunter 94404 Foster City
- 10625 Pots not installed
 - 12686 Pots not installed
 - Time reporting
 - Material reporting
 - Expense reporting
 - Field Service Task Report
 - Field Service Request Report
 - Installation Charge POTS

Expense Reporting

New Expense Lines

*Business Process:

*Expense Type: *Expense Item:

Quantity: *UOM:

Cost: *Currency:

Added Expense Lines

Business Process	Expense Type	Expense Item	Quantity	UOM	Cost	Currency
Customer Call	Return for Repair	Expense Item (Dollars) (Expense Item (Dollars))			123	Australian Dollar
Depot Repair	1EH m ret 25Jun02	Expense Item (Dollars) (Expense Item (Dollars))			12	ANY Currency

First | Previous 1 - 2 of 2 Next | Last

3.4.6.4 Printing the Field Service Request Report

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

Steps

Complete the following steps to print the Field Service Request Report.

1. Click the Information tab to open the Information page.
2. Choose the desired service request for which you want to print a report.
See "[Viewing and Changing Service Request Information](#)" on page 3-15 for a complete description of this procedure.

3. Under the Contents heading, click the "+" button to the left of the service request for which you want to print a report.

The field service request report, the customer product (install base), and task(s) appear under the selected service request.

4. Click **Field Service Request Report**.

The summary appears, showing the Reported time, Reported material, and Reported expenses. The current date and space for a signature appear at the bottom of the report.

ORACLE
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View **Service Request** [Advanced](#)

Search %

Contents

- Costco Wholesale Corp. 98027 Issaquah
 - 1000001000026 Do a good job.
 - 1000002000026 This field is not bl
 - 27934 Problem resolution Modified by anand
 - 19583 task1
 - Field Service Request Report**
 - AS18947
 - 31542 srsi
 - 36576 srsi1
 - 70554 srsi test 07-oct-2002 msanl
- Paul Hunter 94404 Foster City
 - 10625 Pots not installed

ORACLE
e-businesssuite

Customer details

Name	Costco Wholesale Corp.	Contact	James Jackson
Address	PO Box 34331	Postal Code	98027
City	Issaquah	Phone	

Product details

Product	AS18947	Description	Sentinel Deluxe Desktop
Serial number		Installation date	

Service Request details

Request number	27934	Intake date	19-Aug-2002
Summary	Problem resolution Modified by anand		
Type	Customer Call	Severity	High

ORACLE
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View: Service Request [Advanced](#)

Search: %

Contents

- Costco Wholesale Corp. 98027 Issaq
 - 1000001000026 Do a good job.
 - 1000002000026 This field is not bl
 - 27934 Problem resolution Modific
 - 19583 task1
 - Field Service Request Report**
 - AS18947
 - 31542 srsi
 - 36576 srsi1
 - 70564 srsi test 07-oct-2002 msanl
- Paul Hunter 94404 Foster City
 - 10625 Pots not installed

Reported time

Task Number	Labor type	Labor item	Start	End	Start mileage	End mileage
19583	Labor	Labor Item	2002-08-22 00:00	2002-08-22 04:00	1	11
	Transaction	(Labor Item)				
19583	Return for Repair	Labor Item	2002-08-27 00:00	2002-08-27 01:00	21	31
19583	Labor	Labor Item	2002-09-17 15:00	2002-09-17 16:00	31	51
	Transaction	(Labor Item)				
19583	Return for Repair	Labor Item	2002-09-21 21:00	2002-09-21 22:00	100	150
	(Labor Item)					

Reported material

Task Number	Transaction Type	Status	Product	Description	Serial number	Inventory	Qty	UOM
19583	Return Repaired	Used	CM23592	Molded Plastic Shell - Bottom		Stores	1	Each
19583	Return Repaired	Used	CM23592	Molded Plastic Shell - Bottom		Stores	1	Each

Reported expenses

Task Number	Expense item	Expense Amount	Currency Code	Quantity	UOM
19583	Expense Item (Dollars) (Expense Item (Dollars))			1	USD
19583	Expense Item (Dollars) (Expense Item (Dollars))	50	ANY		
19583	Expense Item (Dollars) (Expense Item (Dollars))	50	USD		

ORACLE
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View: Service Request [Advanced](#)

Search: %

Contents

- Costco Wholesale Corp. 98027 Issaq
 - 1000001000026 Do a good job.
 - 1000002000026 This field is not bl
 - 27934 Problem resolution Modific
 - 19583 task1
 - Field Service Request Report**
 - AS18947
 - 31542 srsi
 - 36576 srsi1
 - 70554 srsi test 07-oct-2002 msanl
- Paul Hunter 94404 Foster City
 - 10625 Pots not installed

19583	Return for Repair	Labor Item (Labor Item)	2002-09-27 00:00	2002-09-27 01:00	21	31		
19583	Labor Transaction	Labor Item (Labor Item)	2002-09-17 15:00	2002-09-17 18:00	31	51		
19583	Return for Repair	Labor Item (Labor Item)	2002-09-21 21:00	2002-09-21 22:00	100	150		

Reported material

Task Number	Transaction Type	Status	Product	Description	Serial number	Inventory	Qty	UOM
19583	Return Repaired	Used	CM23582	Molded Plastic Shell - Bottom		Stores	1	Each
19583	Return Repaired	Used	CM23582	Molded Plastic Shell - Bottom		Stores	1	Each

Reported expenses

Task Number	Expense item	Expense Amount	Currency Code	Quantity	UOM
19583	Expense Item (Dollars) (Expense Item (Dollars))			1	USD
19583	Expense Item (Dollars) (Expense Item (Dollars))	50	ANY		
19583	Expense Item (Dollars) (Expense Item (Dollars))	50	USD		

Sign off

Name: _____

Date: Jan 30, 2003

5. Click **Print** in your browser window.

3.4.6.5 Printing the Field Service Task Report

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

The time, material, and expenses report information that you entered for a task is listed in the Field Service Task Report under descriptive headers. This information is limited to what you recorded for a particular task.

Steps

Complete the following steps to print the Field Service Task Report:

1. Click the **Information** tab to open the Information page.
2. Choose the desired task for which you want to print a report.

See "[Viewing and Changing Task Information](#)" on page 3-25 for a complete description of this procedure.

3. Under the Contents heading, click the "+" button to the left of the desired task to list all the task reports, including the Field Service Task Report.
4. Click **Field Service Task Report**.

The summary appears, showing the Reported time, Reported material, and Reported expenses. The customer and task details are also shown. The current date and space for a signature appear at the bottom of the report.

The screenshot displays the Oracle Field Service/Laptop e-businesssuite interface. At the top, there is a navigation bar with 'Home', 'Calendar', 'Information', and 'Messaging' tabs. Below this, a search bar is visible with 'View: Service Request' and a 'Go!' button. On the left, a 'Contents' tree shows a hierarchy of tasks and reports, with 'Field Service Task Report' selected. The main content area is divided into several sections:

- Customer details:** Name: Costco Wholesale Corp., Contact: James Jackson, Address: PO Box 34331, City: Issaquah, Postal Code: 98027, Phone: (blank).
- Product details:** Product: AS18947, Description: Sentinel Deluxe Desktop, Serial number: (blank), Installation date: (blank).
- Task details:** Taskname: task1, Status: Completed, Scheduled start: 2002-AUG-20 05:00, Scheduled end: 2002-AUG-20 07:00, Priority: Low.
- Reported time:** A table with columns: Task, Labor type, Labor item, Start, End, Start, End.

ORACLE
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar **Information** Messaging

View: Service Request [Advanced](#)

Search: %

Contents

- Costco Wholesale Corp. 98027 Issaq
 - 1000001000026 Do a good job.
 - 1000002000026 This field is not bl
 - 27934 Problem resolution Modific
 - 19583 task1
 - Time reporting
 - Material reporting
 - Expense reporting
 - Field Service Task Report**
 - Field Service Request Report
 - AS18947
 - 31542 srsi
 - 36576 srsi1
 - 70554 srsi test 07-oct-2002 msanl
- Paul Hunter 94404 Foster City
 - 10625 Pots not installed

Reported time

Task Number	Labor type	Labor item	Start	End	Start mileage	End mileage
19583	Labor Transaction	Labor Item 2002-08- (Labor Item)	2002-08-22 00:00	2002-08-22 04:00	1	11
19583	Return for Repair	Labor Item 2002-08- (Labor Item)	27 00:00	2002-08-27 01:00	21	31
19583	Labor Transaction	Labor Item 2002-09- (Labor Item)	17 15:00	2002-09-17 16:00	31	51
19583	Return for Repair	Labor Item 2002-09- (Labor Item)	21 21:00	2002-09-21 22:00	100	150

Reported material

Task Number	Transaction Type	Status	Product	Description	Serial number	Inventory	Qty	UOM
19583	Return Repaired	Used	CM23592	Molded Plastic Shell - Bottom		Stores	1	Each
19583	Return Repaired	Used	CM23592	Molded Plastic Shell - Bottom		Stores	1	Each

Reported expenses

Task Number	Expense item	Expense Amount	Currency Code	Quantity	UOM
19583	Expense Item (Dollars) (Expense Item (Dollars))			1	USD
19583	Expense Item (Dollars) (Expense Item (Dollars))	50	ANY		
19583	Expense Item (Dollars) (Expense Item (Dollars))	50	USD		

The screenshot displays the Oracle Field Service/Laptop interface. At the top, the Oracle logo and 'Oracle Field Service/Laptop' title are visible. Navigation tabs include Home, Calendar, Information (selected), and Messaging. A search bar shows 'View: Service Request' and 'Advanced' options. A tree view on the left lists contents for 'Costco Wholesale Corp. 98027 Issaq', including various tasks and reports. The main area shows a summary table for task 19583, followed by detailed reports for 'Reported material' and 'Reported expenses'. A 'Sign off' section is at the bottom with fields for Name and Date.

Task Number	Transaction Type	Status	Product	Description	Serial number	Inventory	Qty	UOM
19583	Return for Repair		Labor Item	2002-09-27 00:00	2002-09-27 01:00		21	31
19583	Labor Transaction		Labor Item	2002-09-17 15:00	2002-09-17 16:00		31	51
19583	Return for Repair		Labor Item	2002-09-21 21:00	2002-09-21 22:00		100	150

Task Number	Transaction Type	Status	Product	Description	Serial number	Inventory	Qty	UOM
19583	Return Repaired	Used	CM23592	Molded Plastic Shell - Bottom		Stores	1	Each
19583	Return Repaired	Used	CM23592	Molded Plastic Shell - Bottom		Stores	1	Each

Task Number	Expense item	Expense Amount	Currency Code	Quantity	UOM
19583	Expense Item (Dollars) (Expense Item (Dollars))			1	USD
19583	Expense Item (Dollars) (Expense Item (Dollars))	50	ANY		
19583	Expense Item (Dollars) (Expense Item (Dollars))	50	USD		

Sign off

Name _____
Date Jan 30, 2003

5. Click **Print** in your browser window.

3.4.7 Setting Counters and Counter Properties

You can log a service request for a customer product that contains a counter. A counter helps a service representative determine how much work was done before a customer product was serviced. A copier having a number-of-copies counter is an example of this.

On the Information page, there can be multiple customer product counters, each with multiple readings. From these multiple readings, you can learn the service history of the customer product. You can also create new readings for a customer product counter. You can reset a reading as well as make miscellaneous readings. A *miscellaneous reading* can be a value used for testing a customer product. For example, an engineer who is fixing a copier may make ten test copies after completing the service. The copy counter value increases by ten, but he does not

want the customer to pay for the test copies. Therefore, the field service representative can state a miscellaneous reading of ten.

Finally, you can enter counter properties. Counter properties describe something about the customer product counter.

Steps

Complete the following steps to enter a counter reading and set the counter properties:

1. Click the Information tab to open the Information page.
2. Choose the desired customer product for which you want to enter a counter reading and set the counter properties.

See "[Viewing Install Base Information](#)" on page 3-12 for a complete description of this procedure.

3. Under the Contents header, click the "+" button to the left of the desired customer product to view the counter.

Note: Only customer products with the "+" button contain a customer product counter.

4. Click on the customer product counter.

The counter readings for the selected customer product appear in the Counter Readings view of the Information page. These counter readings are for specific dates.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there is the Oracle logo and the title "Oracle Field Service/Laptop". Navigation tabs include Home, Calendar, Information (selected), and Messaging. A search bar is present with "View" set to "Customer Product" and "Advanced" options. A sidebar on the left lists various units, with "Number of units" selected. The main content area displays a table of counter readings.

Date	Reading	Misc. Reading	UOM	Pro Reset	Pre Reset	Reset Flag	Details
21-Aug-2002 24:00	11		11 EA			<input type="checkbox"/>	
21-Aug-2002 23:00	11		11 EA			<input type="checkbox"/>	
21-Aug-2002 23:15	11		11 EA			<input type="checkbox"/>	
27-Dec-2002 24:24	34		EA			<input type="checkbox"/>	
27-Dec-2002 12:36	51		EA			<input type="checkbox"/>	
27-Dec-2002 12:36	66	60	EA			<input type="checkbox"/>	
04-Feb-2003 24:00	11		12 EA	14	12	<input checked="" type="checkbox"/>	

Navigation: First | Previous 1 - 7 of 7 Next | Last

Buttons: New Reading

5. Click New Reading.

The Information page displays the Counter Reading view.

ORACLE
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View: Customer Product [Advanced](#)

Search: %

Contents

- AS54888
- AS72111
- AS72111
- AS72111
 - Number of units
- AS72111
- AS72111
- ASOITEM-SC
- ASOITEM-SC
- ASOITEM-SC
- ASOITEM-SC
- ASOITEM-SC
- ASOITEM-SC
- CM080901
- CM18759
- CN92777
- CSD001
- CSD0011
- CSD0012
- CSD0015
- CSD004
- GR10000

Counter reading

Counter Name: Number of units Reset Flag

*Date: 04-Feb-2003 | 00 | 00 Pre-reset last reading

*Reading: PostReset First Reading

Misc Reading Type:

Misc. Reading:

Unit Of Measure: EA

Counter values

Property Name	Value
First Previous	0 - 0 of 0 Next Last

- Enter the appropriate information in the Date and Reading fields.

Note: The Date and Reading fields are mandatory. The *date* is the date you take a reading and the *reading* is the counter value that you want to record.

- Complete or change any other fields in this page.
 - Make the appropriate selection from the Misc. Reading Type drop-down list and complete the Misc. Reading field to make miscellaneous readings.
 - Select the Reset Flag check box and then complete the Pre-reset Last Reading and Post-reset First Reading fields to reset the counter.

Pre-reset is the last counter value before the reset of the counter. Post-reset is the first new reading after the reset.
- Complete the property fields for your customer product.

9. Click **Save**.

Oracle Mobile Field Service/Laptop returns to the Counter Readings view of the Information page where the new counter reading is listed.

The screenshot shows the Oracle Field Service/Laptop interface. The top navigation bar includes 'Home', 'Calendar', 'Information', and 'Messaging'. The left sidebar shows a tree view of 'Contents' with various product codes. The main area displays a table of counter readings.

Date	Reading	Misc. Reading	UOM	Pro Reset	Pre Reset	Reset Flag	Details
21-Aug-2002 24:00	11		11 EA			<input type="checkbox"/>	
21-Aug-2002 23:00	11		11 EA			<input type="checkbox"/>	
21-Aug-2002 23:15	11		11 EA			<input type="checkbox"/>	
27-Dec-2002 24:24	34		EA			<input type="checkbox"/>	
27-Dec-2002 12:36	51		EA			<input type="checkbox"/>	
27-Dec-2002 12:36	66	60	EA			<input type="checkbox"/>	
04-Feb-2003 24:00	11		12 EA	14	12	<input checked="" type="checkbox"/>	
04-Feb-2003 05:45	22		15 EA	34	33	<input checked="" type="checkbox"/>	

Navigation: First | Previous 1 - 8 of 8 Next | Last

Buttons: New Reading

3.4.8 Spares Management

Oracle Mobile Field Service/Laptop enables you to manage the parts inventory that you can use in the repair or replacement of parts for a service request. The parts in inventory are known as *spares* and their management is known as *spares management*. Spares management is a critical process in field service. Spares are not only stored in the warehouse, but also inside the truck of a field service representative. It is therefore crucial to know where spares are located and how soon a field service representative can have them. In spares management, Oracle Mobile Field Service/Laptop allows you to do the following:

- Oversee the inventory stocked in the truck
- Manage spare parts

- Order and transfer parts
- Oversee defective parts that need to be sent back
- Maintain stock levels and install base
- Stay current with business information
- Print out service reports (time, material, expenses) for a customer

3.4.8.1 Ordering a Part

Oracle Mobile Field Service/Laptop enables you to view sub-inventory (the location of stock) and the items list. This application also allows you to order a part for replenishment for an existing sub-inventory.

Prerequisites

- Desired part must already exist, either in the vehicle or at some other location (only applicable if Spares Management is being used). See the *Oracle Mobile Field Service Implementation and Administration Guide for Field Service/Laptop* for details about Spares Management.
- Desired part must be defined as "orderable".

Steps

Complete the following steps to order a part:

1. Click the Information tab to open the Information page.
2. From the View drop-down list, select **Inventory**.
3. In the Search field, type the % wildcard character and then click **Go**.

Inventories appear under the Contents heading, on the left side of the page.

If you know the service request for which you want to search, enter all or part of the service request name in the Search field. Use the % wildcard to represent one or more unknown characters.

To narrow the search to more specific criteria:

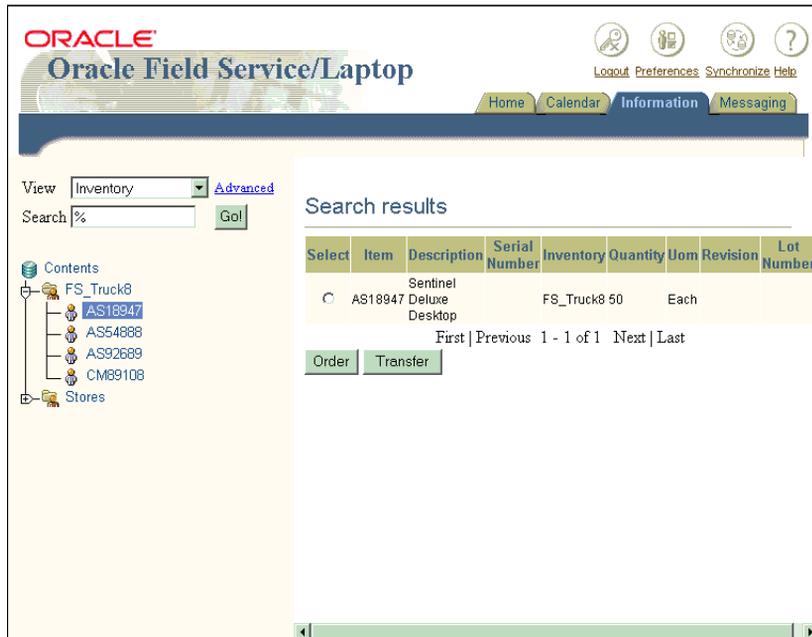
- From the View drop-down list, select **Inventory** and then click **Advanced**.
Additional fields are displayed on which you can search.
- Complete one or more fields and then click **Search**.

Use the % wildcard to represent one or more unknown characters.

The desired inventory or those matching the specified criteria appear under the Contents heading, on the left side of the page.

4. Under the Contents heading, click the "+" button to the left of the desired inventory to view the inventory items.
5. Click on an inventory.

The inventory items for the selected inventory appear in the Search Results view of the Information page.



6. In the Select column, click the button of the desired part and then click **Order**.
The Information page displays the Order an Item view.
Click **Transfer** to transfer a part. See "[Transferring a Part](#)" on page 3-57 for a complete description of this procedure.
7. Complete the Quantity field with the appropriate information.
8. Select the appropriate information from the UOM (Unit Of Measure), Subinventory, and Shipment location drop-down lists.

Note: The Quantity field along with the UOM, Subinventory, and Shipment location drop-down lists are mandatory. The shipment location is where you want the part delivered.

9. Complete the Need by date field to specify a part delivery date.
10. Click **Save** to place the order.
Click **Restore** to cancel the order.

3.4.8.2 Transferring a Part

This section describes how to transfer a part from one sub-inventory to another.

Steps

Complete the following steps to transfer a part from a sub-inventory:

1. Click the Information tab to open the Information page.
2. Choose the desired inventory from which you want to transfer a part.
See "[Ordering a Part](#)" on page 3-55 for a complete description of this procedure.
3. From the Select column in the Information page, Search Results view, click the button of the desired part and then click **Transfer**.

The Information page displays the Transfer Parts view.

Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View: Inventory [Advanced](#)

Search: %

Contents

- Stores
 - AS54888
 - AS54999
 - AS72111
 - ASL_USAGE_TEST
 - ASOITEM-SC
 - A_Scrap_Superceed
 - CM060901
 - CM23592
 - CN92777
 - CSD0011
 - CSD0012
 - CSD0015
 - CSD004
 - DELV10143
 - GR10000
 - Item KM1
 - NC_NOTIF
 - PFITEM001
 - RITEM11
 - V1Item

Transfer Parts

New Transfer Line

Item: AS54888 Description: Sentinel Standard Desktop
 Revision: A Lotnumber: _____
 Serial Number: _____

*Subinventory: Stores Inventory *To subinventory: _____
 *Quantity: _____ *UOM: Each
 Reason: _____ Reference: _____

Transfer Lines

Item	Subinventory	To subinventory	Quantity	UOM	Reason	Reference
First Previous 0 - 0 of 0 Next Last						

Click **Order** to order a part. See "[Ordering a Part](#)" on page 3-55 for a complete description of this procedure.

4. From the Subinventory drop-down list, select the subinventory from which you want to transfer a part.
5. From the To subinventory drop-down list, select the destination subinventory where you want transfer a part.
6. From the Quantity field, specify the amount of parts you want to transfer.
7. From the UOM drop-down list, select the unit of measure for the amount.

Note: The Subinventory, To subinventory, Quantity, and UOM drop down lists are mandatory.

8. From the Reason drop-down list, select the reason for the transfer.
9. In the Reference field, specify the transfer reference.

10. Click **Add.**

A summary of the part transfer appears in the Transfer Lines table.

Click **Cancel** to exit without saving.

3.4.8.3 Viewing Part Order Details

Once a part is ordered, you can view the details regarding this part.

Prerequisites

A part must be ordered to view the order details.

Steps

Complete the following steps to view part order details:

1. Click the Information tab to open the Information page.
2. From the View drop-down list, select **Order**.
3. In the Search field, type the % wildcard character and then click **Go**.

Item descriptions appear under the Contents heading, on the left side of the page. These descriptions include the item number, status, and requirement number

If you know the item for which you want to search, enter all or part of the item name in the Search field. Use the % wildcard to represent one or more unknown characters.

To narrow the search to more specific criteria:

- From the View drop-down list, select **Order** and then click **Advanced**.

Additional fields are displayed on which you can search.

- Complete one or more fields and then click **Search**.

Use the % wildcard to represent one or more unknown characters.

The desired item or those matching the specified criteria appear under the Contents heading, on the left side of the page.

4. Click on the name of the desired item.

A detailed description for the selected item appears in the Item Order Details view of the Information page.

The screenshot displays the Oracle Field Service/Laptop web interface. At the top, the Oracle logo and 'Oracle Field Service/Laptop' title are visible. Navigation tabs include Home, Calendar, Information (selected), and Messaging. Utility links for Logout, Preferences, Synchronize, and Help are also present.

The main content area is divided into a left sidebar and a main details pane. The sidebar contains a 'View' dropdown set to 'Order' with an 'Advanced' link, a search field with a 'Go!' button, and a 'Contents' tree listing three items: '75100001 New 1000002000002' (selected), '75100001 New 1000003000002', and 'AS54888 Failed 1000001000002'.

The main details pane is titled 'Item Order details' and contains the following information:

- Item Number:** 75100001
- Description:** Printer Mechanism

Below this is the 'Shipment details' section:

- Quantity:** 1
- UOM:** GRO
- Order need date:** (blank)
- Subinventory:** FS_Truck8
- Process status:** New
- Order number:** -
- Arrival date:** (blank)
- Requirement number:** 1000002000002

The 'Shipment address' section provides the following details:

- Address 1:** 393
- Address 2:** Bramble
- Postal Code:** 94404
- City:** Foster City
- State:** CA
- Country:** US

3.5 Using the Messaging Page

Oracle Mobile Field Service/Laptop enables you to send and receive messages to other people within your organization. This messaging function facilitates communication among field service employees. It can be set up to send messages among all Field Service users, or among the members of one team.

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

3.5.1 Reading Received Messages

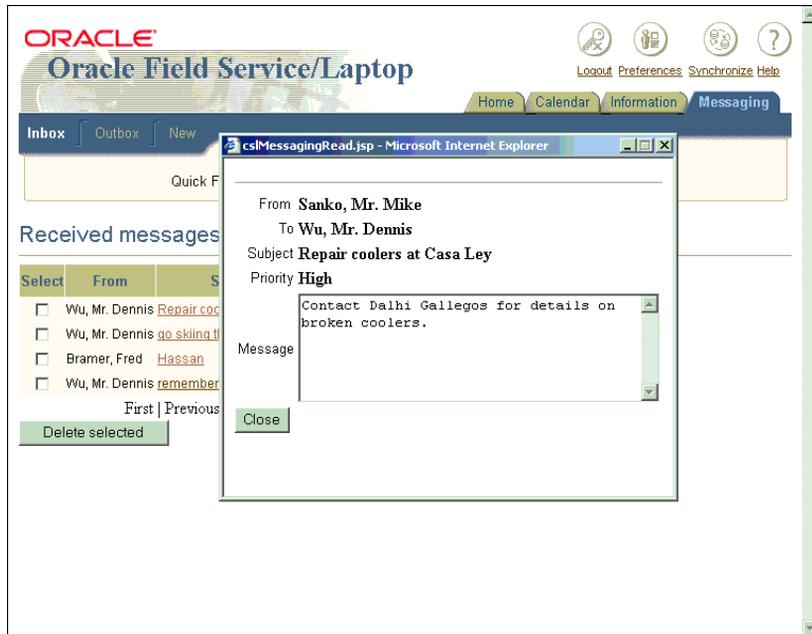
After you synchronize with the enterprise system, you can check to see if you have received any messages.

Steps

Complete the following steps to read messages that you have received, and to delete messages that you have read:

1. Click the Messaging tab to open the Messaging page.
2. Ensure that the Inbox subtab is selected.
3. To read a message, click on the message subject in the Subject column.

A window opens showing the complete message. A blue icon next to the Subject indicates that the message has an attachment.



4. To reply to a message, click **Reply**.

A new message with a blank Message field appears. The subject and recipient fields are already completed.

5. To delete a message, select the check box to the left of the desired message and then click **Delete selected**.

The check box is in the Select column.

3.5.2 Writing and Sending New Messages

When you need information from one of the other members of the field service organization, you can ask for it by sending a message.

Steps

Complete the following steps to write and send messages to others people in your field service organization:

1. Click the Messaging tab to open the Messaging page.
2. Click the New subtab.

The screenshot displays the Oracle Field Service/Laptop interface. At the top, the Oracle logo and 'Oracle Field Service/Laptop' title are visible. Navigation tabs include 'Home', 'Calendar', 'Information', and 'Messaging'. A search bar contains 'Quick Find' and a dropdown menu with 'Customer' selected. The 'New message' section includes a 'To' dropdown, a 'Subject' text field, a 'Priority' dropdown set to 'Medium', and a large 'Message' text area. A 'Send' button is positioned at the bottom left of the message form.

3. From the To drop-down list, select the recipient's name.
4. In the Subject field, enter a title or brief summary of the message.
5. Change the information in the Priority drop-down list, if necessary.
6. In the Message field, enter the text of the message.
Messages can be up to 255 characters long.
7. Click **Send** to send the message.

3.5.3 Viewing Sent Messages

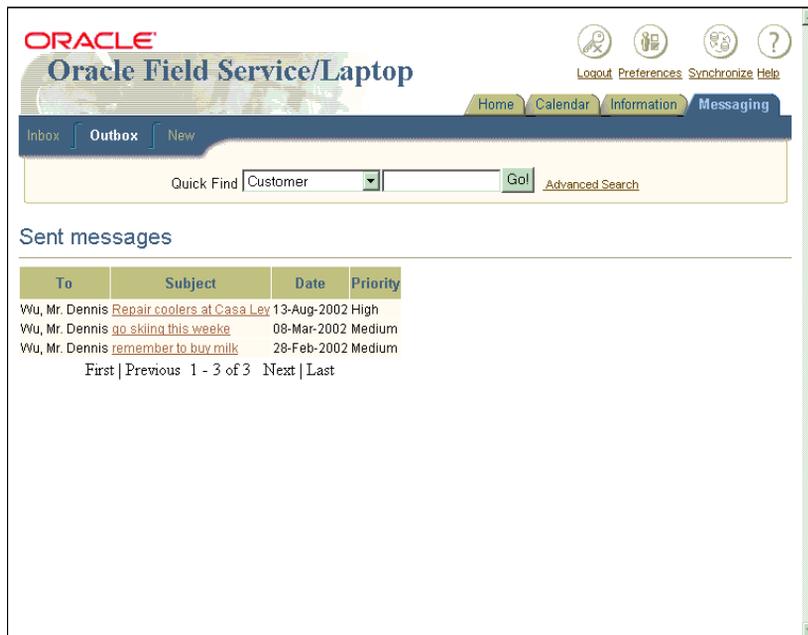
In the Messaging page, you can ensure that a message you wrote has been sent to the intended person(s) in your field service organization.

Steps

Complete the following steps to view the messages you have sent:

1. Click the Messaging tab to open the Messaging page.
2. Click the Outbox subtab.

The messages you have recently sent appear.



3. Click on the recipient's name in the To column to see the user IDs of the other mobile users.
4. Choose the recipient's name.
5. Click on the message in the Subject column to see the text of the message that you sent.

3.6 Using the Home Page

The Home page contains the Task Summary table, which summarizes your tasks for the day. The Task Summary table lists how many tasks are at a particular status.

The Home page is updated each time you synchronize with the enterprise system.

Steps

Complete the following step to access the Home page:

- Click the Home tab to open the Home page.

In this page, you can view the Tasks Summary table.



ORACLE
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

Quick Find Customer Go! [Advanced Search](#)

Welcome Dennis GO

Tasks Summary

Tasks	Status
1	Completed
8	Assigned
1	Working

First | Previous 1 - 3 of 3 Next | Last

Version 11.5.8

3.7 Using the Quick Find Function

You can perform a quick find from the Home, Calendar, and Messaging pages. A quick find allows you to locate any of the following:

- Customer
- Customer product
- Inventory
- Item
- Order
- Personal task
- Service request
- Task

Steps

To do a quick find, complete the following steps from either the Home, Calendar, or Messaging pages:

1. From the Quick Find drop-down list, select the type of information for which you want to search.
2. In the search field, enter the word or numbers for which to search.
Use the % wildcard to represent one or more unknown characters.
3. Click **Go**.

The Information page opens and the search results are displayed in an outline on the left side of the page.

To narrow the search to more specific criteria:

- From the Quick Find drop-down list, select a value and then click **Advanced Search**.

Additional fields appear that correspond to the type of information you entered in the Quick Find drop-down list.

- Complete one or more fields and then click **Search**.

Use the % wildcard to represent one or more unknown characters.

3.8 Global Button Functionality

The global buttons are located in the upper right corner of each page in the Oracle Mobile Field Service/Laptop application.

3.8.1 Preferences Button

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

3.8.2 Synchronizing with the Enterprise System

In order to receive new data assigned to you, such as new tasks and service requests, you need to synchronize with the enterprise system. Likewise, to send the changes that you have made, such as creating debrief lines and updating task statuses to the enterprise system, you need to synchronize with the enterprise system.

Steps

Complete the following steps to synchronize Oracle Mobile Field Service/Laptop information with the enterprise system:

1. Establish a telephone / internet connection for your laptop computer.
2. Click the **Synchronize** button in the upper right corner of the page.

The Synchronization page opens.



The information on your laptop computer is synchronized with the enterprise system. Synchronizing your data can take a few minutes; therefore, do not abort this process. If the synchronization process fails, contact your system administrator.

3.8.3 Obtaining Online Help

The online help for the Oracle Mobile Field Service/Laptop application is an online version of the *Oracle Mobile Field Service User Guide for Laptops*.

Steps

Complete the following steps to obtain online help:

1. Click the **Help** button in the upper right corner of any page.

Oracle Mobile Field Service/Laptop displays an online version of the *Oracle Mobile Field Service User Guide for Laptops*.

2. Navigate through the hyperlinks to find the desired information.

3.8.4 Logging Out

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

Prerequisites

Save all data and be ready to exit the application.

Steps

Do the following to log out of Oracle Mobile Field Service/Laptop:

- Click the **Logout** button in the upper right corner of any page.
Oracle Mobile Field Service/Laptop checks that all data has been correctly saved and then closes. The application returns you to the login page.

Setting up Schedules and Responsibilities

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 appendix describes the different levels of control the field service representative can exercise when doing his job.

A.1 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.

A.2 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 calendars of all three representatives. It now appears on their calendars. However, if one of your field service representatives changes the time for his task, that would affect the calendar 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.

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