

# **Oracle® Mobile Field Service**

User Guide for Laptops

Release 11*i*

**Part No. B10088-05**

December 2003

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

Part No. B10088-05

Copyright © 1996, 2003 Oracle Corporation. All rights reserved.

Primary Author: Mike Sanko

Contributing Authors: Millie Wang, Michelle Cheng

The Programs (which include both the software and documentation) contain proprietary information of Oracle Corporation; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent and other intellectual and industrial property laws. Reverse engineering, disassembly or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. Oracle Corporation does not warrant that this document is error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Oracle Corporation.

If the Programs are delivered to the U.S. Government or anyone licensing or using the programs on behalf of the U.S. Government, the following notice is applicable:

**Restricted Rights Notice** Programs delivered subject to the DOD FAR Supplement are "commercial computer software" and use, duplication, and disclosure of the Programs, including documentation, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement. Otherwise, Programs delivered subject to the Federal Acquisition Regulations are "restricted computer software" and use, duplication, and disclosure of the Programs shall be subject to the restrictions in FAR 52.227-19, Commercial Computer Software - Restricted Rights (June, 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and Oracle Corporation disclaims liability for any damages caused by such use of the Programs.

Oracle is a registered trademark, and Oracle *MetaLink*, Oracle *9i*, Oracle Store, and SQL\*Plus are trademarks or registered trademarks of Oracle Corporation. Other names may be trademarks of their respective owners.

---

---

# Contents

<b>Send Us Your Comments .....</b>	<b>v</b>
<b>Preface.....</b>	<b>vii</b>
Intended Audience .....	vii
How To Use This Guide .....	vii
Typographic Conventions.....	viii
Documentation Accessibility .....	viii
Other Information Sources .....	ix
Do Not Use Database Tools to Modify Oracle Applications Data .....	xi
About Oracle .....	xii
<b>1 Understanding Oracle Mobile Field Service/Laptop</b>	
1.1 What is Oracle Mobile Field Service/Laptop.....	1-1
1.2 Overview of the Oracle Field Service Suite .....	1-2
1.3 The Oracle Field Service Process.....	1-3
1.4 Navigation Path.....	1-6
<b>2 Installing Oracle Mobile Field Service/Laptop</b>	
2.1 Minimum Hardware Requirements .....	2-1
2.2 Minimum Software Requirements.....	2-1
2.3 Installing the Software.....	2-2

### 3 Using Oracle Mobile Field Service/Laptop

3.1	Application Overview .....	3-1
3.2	Launching Oracle Mobile Field Service/Laptop .....	3-3
3.3	Using the Calendar Page .....	3-5
3.3.1	Viewing and Opening Tasks.....	3-6
3.3.2	Viewing a Past or Future Calendar.....	3-9
3.3.3	Using Quick Debrief .....	3-10
3.3.4	Creating a Personal Task.....	3-21
3.4	Using the Information Page .....	3-22
3.4.1	Viewing Customer Information .....	3-22
3.4.2	Viewing Install Base Information.....	3-26
3.4.3	Working with Service Requests .....	3-30
3.4.4	Working with Tasks .....	3-41
3.4.5	Creating and Viewing Notes .....	3-47
3.4.6	Debrief Reporting.....	3-50
3.4.7	Setting Counters and Counter Properties.....	3-70
3.4.8	Spares Management.....	3-74
3.5	Using the Messaging Page .....	3-81
3.5.1	Viewing Received Messages.....	3-81
3.5.2	Writing and Sending New Messages .....	3-82
3.5.3	Viewing Sent Messages .....	3-83
3.6	Using the Home Page .....	3-85
3.7	Using the Quick Find Function .....	3-86
3.8	Global Button Functionality.....	3-87
3.8.1	Preferences Button.....	3-87
3.8.2	Synchronizing with the Enterprise System .....	3-87
3.8.3	Obtaining Online Help .....	3-89
3.8.4	Logging Out .....	3-89

### A Setting up Schedules and Responsibilities

A.1	Conform to the Schedule .....	A-1
A.2	Order of Task Completion.....	A-2

### Index

---

---

# Send Us Your Comments

**Oracle Mobile Field Service User Guide for Laptops, Release 11*i***

**Part No. B10088-05**

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?
- Do you need more information? If so, where?
- 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](mailto: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 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 field service representatives can exercise when doing their 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.
<b>bold</b>	Emphasizes important information. Also indicates button or option selections. For example, click <b>Next</b> .
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/>

**Accessibility of Links to External Web Sites in Documentation** This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

## 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 field service representatives 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 field service representatives is eliminated. For instance, field service representatives automatically receive the customer service history with the service request. Equipped with this information, they can better carry out their responsibilities at the customer site. Likewise, field service representatives are 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, field service representatives can access the robust spare parts management feature of Oracle Mobile Field Service/Laptop. When field service representatives have completed a task, they can report the time, materials, and expenses incurred during their 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 field service representatives to work in all places independent of network coverage. The dispatcher sends a job to field service representatives 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.

<b>Suite Application</b>	<b>Description</b>
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.
<b>Oracle Mobile Field Service/Laptop</b>	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 Palm™ handheld device so field service representatives can receive their 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, field service representatives electronically submit 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 representatives and home office.

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

<b>Steps</b>	<b>Description</b>
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 field service representatives 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
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. Field service representatives receive notification and progress on the task that is monitored.
4. Service request delivery and reporting	Once field service representatives receive an assigned task or schedule, they can begin service at the customer site. They report on progress, materials used and recovered, expenses, and labor time. Additionally, they can record counter readings and describe how the problem was resolved. It might be necessary to create new tasks or service requests if a field service representative cannot help the customer immediately. They 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 field service representatives complete a task, they sets the task status to COMPLETE and move 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.

---

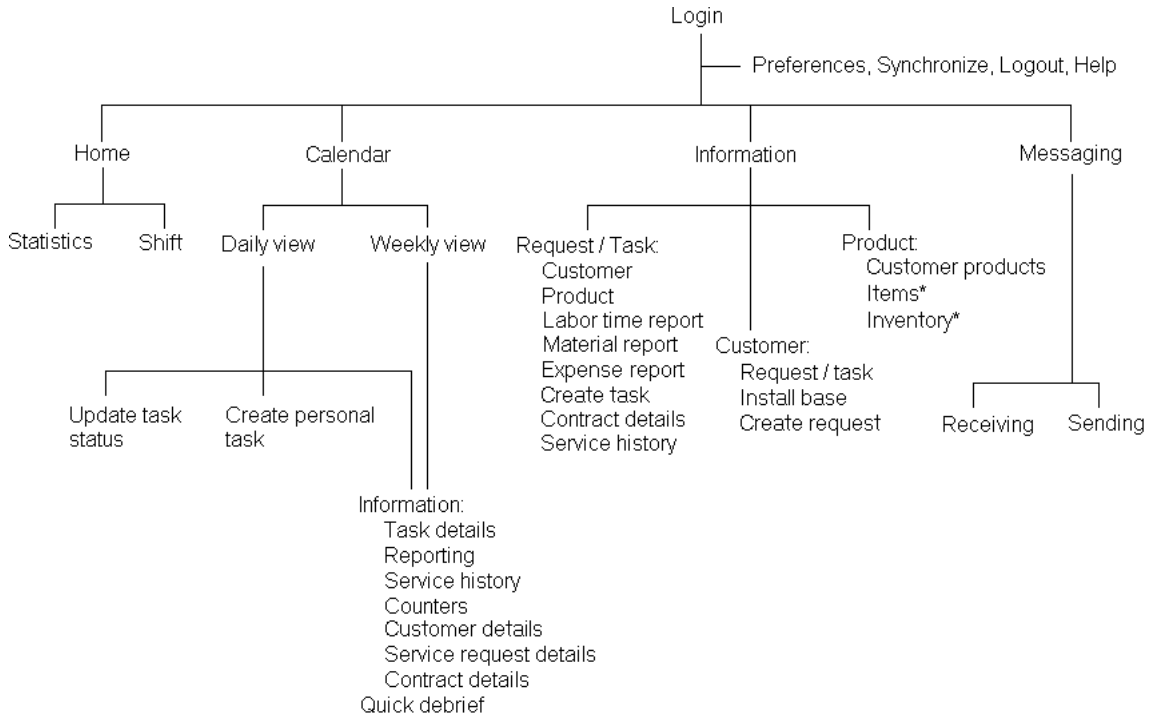
**Note:** Depending on your service organization, the above steps can be separated or combined.

---

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 field service representatives on their laptop computer. They record counter readings and report on materials 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 3-75 for a complete description of these procedures.

The Preferences, Synchronize, Logout and Help text in the above figure represents the global buttons. See ["Global Button Functionality"](#) on page 3-87 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 how many tasks on your laptop computer are at a particular status. The Calendar page is where you view all of the scheduled tasks assigned to you for either the day or week, depending on the view you are in. 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.

### Steps

Complete the following steps to install Oracle Mobile Field Service/Laptop on your laptop computer:

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

`http://<Mobile Server>/setup`

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

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

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

4. From Windows Explorer, double-click the `setup.exe` file that you just downloaded.

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

5. Choose an install directory.

For example, `C:\ora_HOME` and then click **OK**. The setup program downloads all the required components. Once the installation is completed, your browser will launch. If the browser does not launch automatically, the setup program box will have the Web-to-Go URL displayed on it. For example, `http://my-laptop`. In this case, click the URL.

---

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

---

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

Oracle9i Lite

Help | Logon

Workspace

Logon

■ [About Web-to-Go](#)

User Name:  
ppatanke

Password:  
XXXXXXXXXX

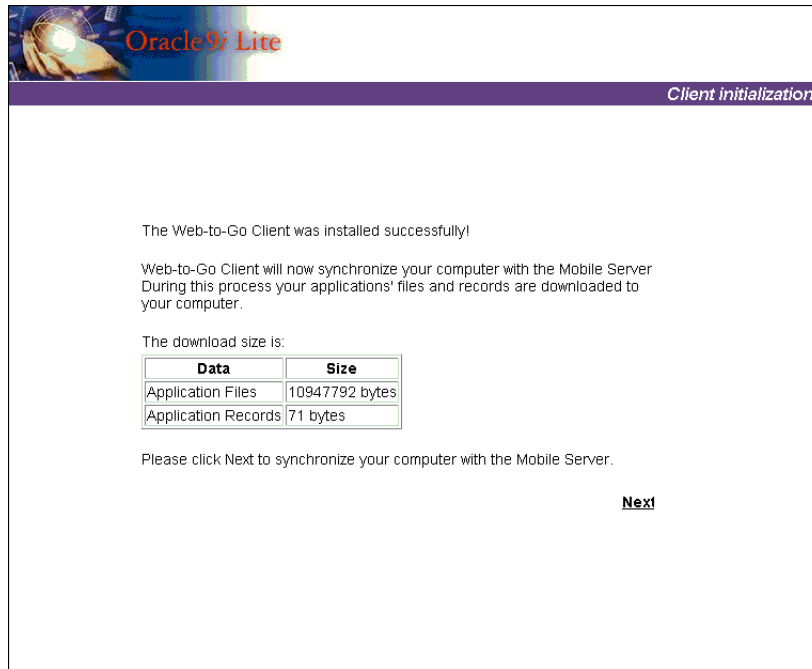
Logon

Copyright © Oracle Corporation, 2001  
Minimum requirements: Netscape 4.06/MSIE 4.0 browser with JavaScript enabled, 800x600 display.

If the browser returns a "Page Not Found" error, check your proxy settings. In Internet Explorer, ensure that the Bypass Proxy for Local Addresses check box is selected under Tools > Internet Options > Connections > LAN Settings. Reload the page and try again.

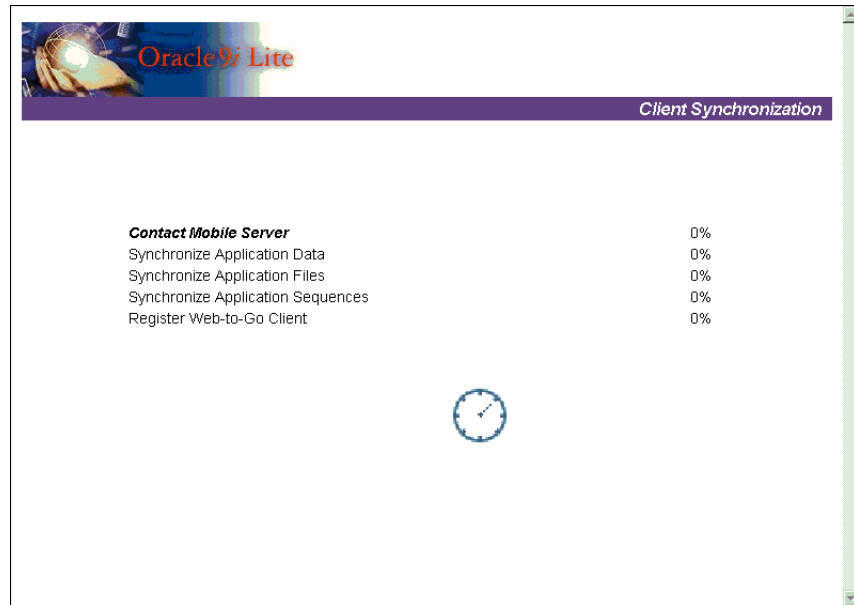
7. Click **Go**.

The Oracle9i Lite Client Initialization page opens.



**8. Click Next.**

The Oracle9i Lite Client Synchronization page opens. The initial synchronization downloads the application and your initial set of data. The synchronization takes several minutes; therefore, do not exit the browser until the synchronization is complete.



After synchronization completes, the browser displays the Oracle Mobile Field Service/Laptop Calendar page (Daily View).

The screenshot displays the Oracle Field Service/Laptop application interface. At the top, the Oracle logo and the title "Oracle Field Service/Laptop" are visible. Navigation tabs include Home, Calendar (selected), Information, and Messaging. A search bar at the top right contains "Quick Find" with a dropdown menu set to "Customer" and a "Go!" button. Below the search bar, the "Calendar: Daily View" is shown for "18-Oct-2000". A table lists three tasks with columns for Request, Scheduled, Travel Time, Customer, Task Name, Task Number, Product, Status, and Quick Debrief.

Request	Scheduled	Travel Time	Customer	Task Name	Task Number	Product	*Status	Quick Debrief
<a href="#">4045</a>	08:30		World of Business CRM San Jose	Laptop making weird noises. Feels hot when touched.	10674	Envoy Standard Laptop	Assigned	
<a href="#">4046</a>	08:30		World of Business CRM San Jose	CD-Rom drive does not work. Need this to install critical applications.	10675	Sentinel Standard Desktop	Cancelled	
<a href="#">4146</a>	11:00		World of Business CRM San Jose	Power module failed. Fix.	10713	Sentinel Standard Desktop	Assigned	

Navigation controls at the bottom of the table include "Update", "Create Personal Task", and pagination: "First | Previous 1 - 3 of 3 Next | Last".

To start Oracle Mobile Field Service/Laptop after installing the application, see "[Launching Oracle Mobile Field Service/Laptop](#)" on page 3-3.

---

---

# 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 field service representatives may start and end their 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 3-87.

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 3-6.
4. Create a personal task if you need to communicate any unavailability.  
See ["Creating a Personal Task"](#) on page 3-21.
5. Record the time before visiting the customer site.  
See ["Creating and Deleting a Time Report Item"](#) on page 3-50.
6. Open the task and view or change task information.  
See ["Viewing and Opening Tasks"](#) on page 3-6 and ["Viewing and Changing Task Information"](#) on page 3-42.
7. Review customer information.  
See ["Viewing Customer Information"](#) on page 3-22
  - Review contract information.  
See ["Viewing Contractual Information"](#) on page 3-36.
  - Review service history information.  
See ["Viewing Service History"](#) on page 3-40.
  - Create or update a customer note if necessary.  
See ["Creating and Viewing Notes"](#) on page 3-47.
8. Update or enter any service request information.  
See ["Viewing and Changing Service Request Information"](#) on page 3-30.
9. Set any counter and counter properties.  
See ["Setting Counters and Counter Properties"](#) on page 3-70.
10. Order or transfer any necessary parts needed to finish the task.  
See ["Spares Management"](#) on page 3-74.
11. Record the time prior to leaving the customer site.  
See ["Creating and Deleting a Time Report Item"](#) on page 3-50.
12. Record any materials used to complete the task.  
See ["Creating and Deleting a Material Report Item"](#) on page 3-53.

13. Record expenses incurred while completing the task.  
See "[Creating and Deleting an Expense Report Item](#)" on page 3-61.
14. Repeat these steps for each task that you complete.
15. Finally, exit out of Oracle Mobile Field Service/Laptop.  
See "[Logging Out](#)" on page 3-89.

## 3.2 Launching Oracle Mobile Field Service/Laptop

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 the Oracle E-Business Suite login page.

The screenshot shows the Oracle E-Business Suite login page. At the top, it says "Welcome to Oracle e-business suite" with a "Help | Logon" link in the top right corner. Below this is a "Login" section with two input fields: "User ID" and "Password", and a "Go" button. To the right of the login fields is a section titled "About Oracle e-business suite!" with the text: "In a marketplace where speed provides a competitive advantage, your choice is E-business or out of business. Oracle E-Business Suite is the simple, complete solution designed to get you moving at internet speed."

3. Enter your user name and password in the appropriate fields and then click **Go**.

The Calendar page (Daily View) opens. For a complete description of this page, see "Using the Calendar Page" on page 3-5.

**Oracle Field Service/Laptop**

Logout Preferences Synchronize Help

Home Calendar Information Messaging

Daily Weekly

Quick Find Customer  Go! Advanced Search

Calendar: Daily View Today 18-Oct-2000 Go!

Request	Scheduled	Travel Time	Customer	Task Name	Task Number	Product	Status	Quick Debrief
4045	08:30		World of Business CRM San Jose	Laptop making weird noises. Feels hot when touched.	10674	Envoy Standard Laptop	Assigned	
4046	08:30		World of Business CRM San Jose	CD-Rom drive does not work. Need this to install critical applications.	10675	Sentinel Standard Desktop	Cancelled	
4146	11:00		World of Business CRM San Jose	Power module failed. Fix.	10713	Sentinel Standard Desktop	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.

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

### 3.3 Using the Calendar Page

The Calendar tab is used to access the Calendar page, which can contain the daily or weekly listing of tasks assigned to you. The calendar gives you an immediate overview of all the tasks that need to be done for the day or week, along with pertinent task information, such as the scheduled task start time.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there is the Oracle logo and the text "Oracle Field Service/Laptop". Navigation tabs include "Home", "Calendar", "Information", and "Messaging". A search bar contains "Customer" and a "Go!" button. Below the search bar, the "Calendar: Daily View" is displayed for "13-Sep-2002". A table lists tasks with columns: Request, Scheduled, Travel Time, Customer, Task Name, Task Number, Product, \*Status, and Quick Debrief. One task is visible: Request 31332, Scheduled 15:43, Customer Business World, Task Name 2391 L STREET SAN JOSE, Task Number Task 1 09/13/02 20083, Product Envoy Deluxe Laptop, and Status Accepted. Navigation buttons include "Update" and "Create Personal Task".

Request	Scheduled	Travel Time	Customer	Task Name	Task Number	Product	*Status	Quick Debrief
31332	15:43		Business World 2391 L STREET SAN JOSE	Task 1 09/13/02	20083	Envoy Deluxe Laptop	Accepted	

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there is the Oracle logo and the text "Oracle Field Service/Laptop". Navigation tabs include "Home", "Calendar", "Information", and "Messaging". A search bar contains "Customer" and a "Go!" button. Below the search bar, the "Calendar: Weekly View" is displayed for "13-Sep-2002". The calendar grid shows days from Monday (09-Sep-2002) to Sunday (15-Sep-2002). A task is visible on Friday (13-Sep-2002) at 15:43, with details: Task 1 09/13/02 Accepted, Business World, and Quick Debrief.

Monday 09-Sep-2002	Tuesday 10-Sep-2002	Wednesday 11-Sep-2002	Thursday 12-Sep-2002	Friday 13-Sep-2002	Saturday 14-Sep-2002	Sunday 15-Sep-2002
				Task 1 09/13/02 Accepted Business World Quick Debrief 15:43		

The calendar defaults to the date of the oldest active task. For example, if a task from yesterday has not yet been closed or completed, Oracle Mobile Field Service/Laptop will display this task first in the Calendar page. The tasks for the

current day are listed in ascending order based on the scheduled date/time, after any active tasks from previous days.

The following table describes what you can do from the Calendar page based on the page view:

Calendar Function	Daily View	Weekly View
Navigate to the details of a selected task	Yes	Limited
Change the status of a task	Yes	No
Select a past or future calendar of tasks	For a day	For a week
Create a personal task	Yes	No

---

**Note:** As shown in the table above, you must be in the Daily View of the Calendar page in order to change the task status and create a personal task. The functionality in the Weekly View is an abbreviation of that of the Daily View.

---

### 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.

To view the calendar of tasks for another day or week, see "[Viewing a Past or Future Calendar](#)" on page 3-9.

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

The Weekly View of the Calendar page contains a table of tasks for the week. This table contains columns for each day of the week. A task appears in the column of the day for which it is assigned.

To open the Weekly View, click **Weekly View** in the Calendar tab.

2. Open the task either in the Daily View or Weekly View.

*To Open the Task from the Daily View:*

- From the Calendar: Daily View 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 3-30 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 3-22 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 3-42 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 3-75 for a complete description of this page.

The Calendar: Daily View 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:

<b>Task Status</b>	<b>Description</b>
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 a "Working" task, change its status to "Completed".

*To Open the Task from the Weekly View:*

- If you haven't done so already, click Weekly View in the Calendar tab. The Calendar: Weekly View table appears.
- From the Calendar: Weekly View table, open the task by clicking one of the following:
  - Task name—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 3-42 for a complete description of this page.

- Customer name—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 3-22 for a complete description of this page.

The Calendar: Weekly View table also provides the following information:

- Scheduled start time for a task

### 3.3.2 Viewing a Past or Future Calendar

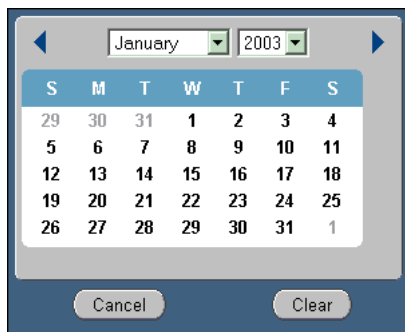
Oracle Mobile Field Service/Laptop enables you to view the calendar of tasks for a past or future day or week.

#### Steps

To view the calendar of tasks for a past or future day or week, 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. To change to the Weekly View, click Weekly View in the Calendar tab.
3. To go to the next or previous calendar of tasks, click the left or right arrow button.
  - In the Daily View, the tasks for the next or previous day appears.
  - In the Weekly View, the tasks for the next or previous week appears.
4. To select a calendar day or week directly, click the calendar button near the date field in upper right portion of the Calendar page.

The calendar window opens.



You can also type the date directly into the date field. If you type the date with the incorrect format, a warning message appears indicating this and then the date reverts back to its original value.

5. Use the month and year drop-down lists to display the desired month and year. Use the left and right arrow buttons in the calendar window to go to the next or previous month.
6. Click on the desired date.

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

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

7. Click **Go**.

If you are in the Daily View, the task(s) for the selected date appears in the Calendar page. If you are in the Weekly View, the tasks for the week of the selected date appear in the Calendar page.

### 3.3.3 Using Quick Debrief

*Quick Debrief* is a feature found in the Calendar page that enables you to view and specify general debrief information and specific labor time, expense, and material information from a single page. See [Debrief Reporting](#) on page 3-50 to learn more about debrief reporting.

Quick Debrief enables you to access debrief information for a specific service request. See [Viewing a Past or Future Calendar](#) on page 3-9 to choose a different service request.

## Steps

To access Quick Debrief, complete the following steps:

1. From the Calendar page, click the Quick Debrief page icon in the Calendar table, under the Quick Debrief heading.

The Quick Debrief page opens.

**ORACLE**  
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging Quick Debrief

Task Details

Quick Find Customer  Go! Advanced Search

**Quick Debrief**

Customer Name **Business World** Product **Envoy Deluxe Laptop** Service Request **SR 1 Ann 09/13/02**

Problem  Resolution

Task Number **20083** Task Name **Task 1 09/13/02** \*Assignment Status **Accepted**

SRNotes [View\(1\)](#) [Add](#) TaskNotes [View\(0\)](#) [Add](#)

Context Value

Lap01

Venky01

samir1 1100: Total Cash

samir2

**Time Reporting**

Business Process	*Labor Type	*Labor Item	*Service Date	Start Time	End Time	Duration	Unit Of Measure	Labor Reason Code
Customer Call	Return for Repair	Labor Item (Labor Item)	24-Oct-2003	00	00	00	00	
Business Process Id	Txn Billing Type Id	Description	Service Date	Start Time	End Time	Duration	Unit Of Measure TI	Labor Reason Code

2. From the Problem drop-down list, specify the type of service request problem.
3. From the Resolution drop-down list, specify the type of service request resolution.
4. In the SRNotes field, click **Add** to open the Notes window and to add a service request note.

See "[Creating and Viewing Notes](#)" on page 3-47 for a complete description of this procedure.

5. In the TaskNotes field, click **Add** to open the Notes window and add a task note.  
See "Creating and Viewing Notes" on page 3-47 for a complete description of this procedure.
6. For any flexfields, complete these according to your needs.
7. To add a labor time report item for a task, complete the following steps:
  - To change the default business process, make the appropriate selection from the Business Process drop-down list.

#### Time Reporting

*Business Process	*Labor Type	*Labor Item	*Service Date	Start Time	End Time	Duration	Unit Of Measure	Labor Reason Code
Customer Call	Return for Repair	Labor Item (Labor Item)	24-Oct-2003	00:00	00:00	00:00		
Business Process Id	Txn Billing Type Id	Description	Service Date	Start Time	End Time	Duration	Unit Of Measure	Labor Reason Code
<input type="checkbox"/>	Depot Repair	1EH m ret 25Jun02 <a href="#">Labor Item</a>	21-Oct-2003	00:00	00:00	2	Hour	
<input type="checkbox"/>	Field Service	Labor Transaction <a href="#">Labor Item</a>	21-Oct-2003	06:00	07:00	1	Hour	Labor - Recall
<input type="checkbox"/>	Customer Call	Return for Repair <a href="#">Labor Service</a>	15-Oct-2003	00:00	00:25			
<input checked="" type="checkbox"/>	Depot Repair	1EH m ret 25Jun02 <a href="#">Labor Item</a>	18-Sep-2002	13:40	14:40	1	Hour	

First | Previous 1 - 4 of 4 Next | Last

---

#### Expense Reporting

*Business Process	*Expense Type	*Expense Item	*Service Date	Quantity				
Customer Call	Return for Repair	Expense Item (Dollars) (Expense Item (Dollars))	24-Oct-2003					
Business Process	Expense Type	Expense Item	Quantity	UOM	Cost	Currency	Justification	Service Date
<input type="checkbox"/>	Customer Call	Return for Repair <a href="#">Expense Item (Dollars)</a>		10.5		US dollar		20-Oct-2003

First | Previous 1 - 1 of 1 Next | Last

---

#### Material Reporting

*Business Process	*Transaction Type
Depot Repair	Estimate Repair

**Recovered part**

---

**Note:** The Business Process, Labor Type, and Service Date drop-down lists are mandatory. To specify the length of the task, *either* the Start Time and End Time fields are mandatory *or* the Duration field and UOM drop-down list are mandatory. Specify the length of time using one of these pairs, but not both.

---

- To change the default labor type, make the appropriate selection from the Labor Type drop-down list.
- To change the default labor item, make the appropriate selection from the Labor Item drop-down list.

---

---

**Note:** The labor item is optional. If you keep the Labor Item drop-down list blank, then it is mandatory that you specify values in the Start Time and End Time fields, but nothing in the Duration field and UOM drop-down list.

---

---

- To change the default service date, specify the appropriate information in the Service Date field.

Use the procedure, "[Viewing a Past or Future Calendar](#)" on page 3-9, beginning with step 4, to change the service date. The star next to the Service Date field indicates that this drop-down list is required.

In the following steps, specify the amount of labor time used to complete the task. According to your business process, complete the steps for *either* the start and end times *or* duration.

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

The Start Time 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.

- From the End Time 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.

- In the Duration field, enter the length of time the task took to complete.
- From the UOM drop-down list, select the unit of time that describes the value in the Duration field.
- From the Reason drop-down list, select the reason for spending the specified labor time on the task.
- Click **Add**.

The labor time report item is saved and added to the time report. In the table in the Time Reporting area, the new labor time report item is now listed.

To clear the information that you specified for the labor time report item, click **Clear**. To delete a labor time report item from the report, select the check box near the desired report item and then click **Delete selected**.

For an open or closed task that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete a labor report item from the labor report.

8. To add an expense report item for a task, complete the following steps:
  - To change the default business process, make the appropriate selection from the Business Process drop-down list.

#### Time Reporting

*Business Process	*Labor Type	*Labor Item	*Service Date	Start Time	End Time	Duration	Unit Of Measure	Labor Reason Code
Customer Call	Return for Repair	Labor Item (Labor Item)	24-Oct-2003	00:00	00:00	00:00	00	
Business Process Id	Txn Billing Type Id	Description	Service Date	Start Time	End Time	Duration	Unit Of Measure	Labor Reason Code
<input type="checkbox"/>	Depot Repair	1EH m ret 25Jun02 <a href="#">Labor Item</a>	21-Oct-2003	00:00	00:00	2	Hour	
<input type="checkbox"/>	Field Service	Labor Transaction <a href="#">Labor Item</a>	21-Oct-2003	06:00	07:00	1	Hour	Labor - Recall
<input type="checkbox"/>	Customer Call	Return for Repair <a href="#">Labor Service</a>	15-Oct-2003	00:00	00:25			
<input checked="" type="checkbox"/>	Depot Repair	1EH m ret 25Jun02 <a href="#">Labor Item</a>	18-Sep-2002	13:40	14:40	1	Hour	

First | Previous 1 - 4 of 4 Next | Last

Clear Add Delete selected

---

#### Expense Reporting

*Business Process	*Expense Type	*Expense Item	*Service Date	Quantity	UOM	Cost	Currency	Justification	Service Date
Customer Call	Return for Repair	Expense Item (Dollars) (Expense Item (Dollars))	24-Oct-2003						Doll
Business Process	Expense Type	Expense Item	Quantity	UOM	Cost	Currency	Justification	Service Date	
<input type="checkbox"/>	Customer Call	Return for Repair <a href="#">Expense Item (Dollars)</a>	10.5		US dollar			20-Oct-2003	

First | Previous 1 - 1 of 1 Next | Last

Clear Add Delete selected

---

#### Material Reporting

*Business Process	*Transaction Type
Depot Repair	Estimate Repair

Recovered part

---

---

**Note:** The Business Process, Expense Type, and Expense Item, and Service Date drop-down lists are mandatory. To specify the expense of the task, *either* the Quantity field and UOM drop-down list are mandatory *or* the Cost field and Currency drop-down list are mandatory. Specify the expense using one of these pairs, but not both.

---

---

- To change the default business process, Customer Support, make the appropriate selection from the Business Process drop-down list.
- To change the default expense type, make the appropriate selection from the Expense Type drop-down list.
- To change the default expense item, make the appropriate selection from the Expense Item drop-down list.
- To change the default service date, specify the appropriate information in the Service Date field.

Use the procedure, "[Viewing a Past or Future Calendar](#)" on page 3-9, beginning with step 4, to change the service date.

- Specify the cost and currency that describes the expense.

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

- Complete the Quantity field and UOM drop-down list if the pricing amount is unknown.
- 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.
- In the Justification drop-down list, select the reason for spending the specified expense on the task.
- Click **Add**.

The expense report item is saved to your laptop computer. In the table in the Expense Reporting area, the new expense report item is now listed.

To clear the information that you specified for the expense report item, click **Clear**. To delete an expense report item from the report, select the check box near the desired report item and then click **Delete selected**.

For an open or closed task that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete an expense report item from the expense report.

There are two versions of the Material Reporting area of the Quick Debrief page: one for used parts and the other for recovered parts. In both versions, there are default values for the Business Process and Transaction Type drop-down lists.

9. To add a material report item for a task, complete the following steps:
  - To change the default business process, make the appropriate selection from the Business Process drop-down list.

First | Previous 0 - 0 of 0 Next | Last

Clear Add Delete selected

**Material Reporting**

\*Business Process \*Service Activity Code  
 Field Service Field Service Return

**Recovered part**

*Item	*Description	Serial Number	*Service Date	*Quantity	*UO
			13-Nov-2003		

Find Clear Add

Status	Service Activity Code	Product	Description	Inventory Locator Id	Quantity	UOM	Reason	Disposition Code	Service Date
<input type="checkbox"/> Used	qamfs mat order ib	AS18947	Sentinel Deluxe Desktop FS_Truck9		1	Each			12-Nov-2003

First | Previous 1 - 1 of 1 Next | Last

Delete selected

**Sign off**

Name

World of Business

Date 13-Nov-2003

Save

Calendar Task Details

The business process selection determines the selection in the Transaction Type drop-down list. The selection in this drop-down list determines

whether fields and drop-down lists for a used or recovered part appear in the Material Reporting area of the Quick Debrief page.

- To change the default transaction type, make the appropriate selection from the Transaction Type drop-down list.

### *Adding a Used Part*

- Click **Find** without completing any fields or drop-down lists.

The Search Materials window opens.

The screenshot shows a window titled "Search Materials". Inside the window, there are several input fields arranged in two columns. The left column contains "Item Number", "Serial Number", "Instance Number", and "Inventory" (with a dropdown arrow). The right column contains "Description", "Revision", and "Lotnumber". Below the input fields, there are three buttons: "Clear", "Find", and "Cancel".

- Click **Find** without completing any fields.

The Search Materials area appears in the Search Materials window.

- Select the desired part from the Search Materials area.

The Search Materials window closes and the selected material report item appears in the Used Part table.

- To change the default service date, specify the appropriate information in the Service Date field.

Use the procedure, "[Viewing a Past or Future Calendar](#)" on page 3-9, beginning with step 4, to change the service date.

- To change the default quantity, specify the correct value in the Quantity field.

- To change the default unit of measure, specify the correct information in the UOM drop-down list.
- From the Reason drop-down list, select the reason for adding the specified part.
- Click **Add**.

The material report item is saved and added to the material report. In the table in the Material Reporting area, the new material report item is now listed.

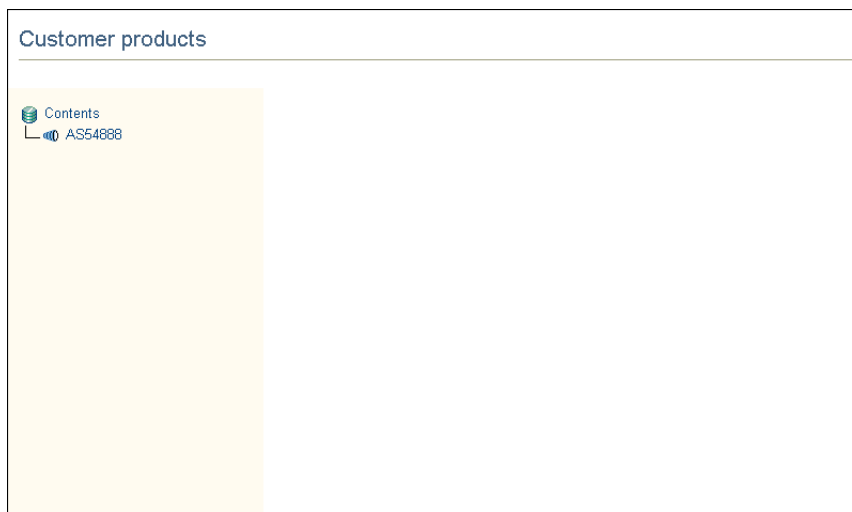
To clear the information that you specified for the material report item, click **Clear**. To delete a material report item for a used part from the report, select the check box near the desired report item and then click **Delete selected**.

For an open or closed task that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete a material report item from the material report.

#### *Adding a Recovered Part*

- Click **Find** without completing any fields or drop-down lists.

The Customer Products window opens.



- Select the desired service request.  
The Customer Products window displays a recovered install base part.

Customer products

Contents  
AS54888

Instance Number 82268  
Product Number qamfsmat5inblins3  
Description qamfs\_mat5\_inbl\_ins3  
Lot Number  
Serial Number qamfs\_mat5sno  
Revision  
Disposition Code Fast Return

Cancel Ok

- Click **OK**.  
The Customer Products window closes and the selected material report item appears in the Recovered Part table.
- To change the default service date, specify the appropriate information in the Service Date field.  
Use the procedure, "[Viewing a Past or Future Calendar](#)" on page 3-9, beginning with step 4, to change the service date.
- To change the default quantity, specify the correct value in the Quantity field.
- To change the default unit of measure, specify the correct information in the UOM drop-down list.
- To change the default inventory, specify the correct information in the Inventory drop-down list.
- From the Reason drop-down list, select the reason for adding the specified part.
- Click **Add**.  
The material report item is saved and added to the material report. In the table in the Material Reporting area, the new material report item is now listed.

To clear the information that you specified for the material report item, click **Clear**.

- To delete a material report item for a recovered part from the report, select the check box near the desired report item and then click **Delete selected**.

For an open or closed task that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete a material report item from the material report.

- View sign off information.

The screenshot displays a software interface with the following sections:

- Navigation:** "First | Previous 0 - 0 of 0 Next | Last"
- Buttons:** "Clear", "Add", "Delete selected"
- Material Reporting:**
  - \*Business Process: Field Service
  - \*Service Activity Code: Field Service Return
- Recovered part:**

*Item	*Description	Serial Number	*Service Date	*Quantity	*UO
			13-Nov-2003		
- Table:**

Status	Service Activity Code	Product	Description	Inventory	Locator Id	Quantity	UOM	Reason	Disposition Code	Service Da
<input type="checkbox"/>	Used	qamfs mat order ib	AS18947 Sentinel Deluxe Desktop FS_Truck9			1	Each			12-Nov-2003
- Navigation:** "First | Previous 1 - 1 of 1 Next | Last"
- Buttons:** "Delete selected"
- Sign off:**
  - Name:
  - World of Business:
  - Date: 13-Nov-2003
  - Signature area:
  - Buttons: "Save"
- Bottom Navigation:** "Calendar", "Task Details"

The customer name, current date, and space for a signature appear at the bottom of the Quick Debrief page. You can print this page and have the customer sign off for the task in the signature area.

- Click **Calendar** to return to the Calendar page.

Click **Task Details** to open the Information page (Task Details view) and view all the details for the task.

### 3.3.4 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 3-5)
- Using the Quick Find function from the Home, Calendar, and Messaging pages (see ["Using the Quick Find Function"](#) on page 3-86)

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 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. Utility icons for Logout, Preferences, Synchronize, and Help are present. The main content area is titled 'Customer details' and shows 'Party Name World of Business' and 'Party Number 1000'. Below this, 'Context Value' is listed as 'qamfs g 1', 'qamfs g 2', and 'qamfs g 3'. A 'Customer locations' table is shown with two entries. At the bottom, there are 'Notes' and 'Create Service Request' buttons.

View: Customer [Advanced](#)  
 Search: %

Contents  
 Business World 95106 SAN JOSE  
 World of Business 95053 San Jose

**Customer details**

Party Name **World of Business** Party Number **1000**

Context Value  
 qamfs g 1  
 qamfs g 2  
 qamfs g 3

**Customer locations**

Address	Postal Code	City	County	Province	State	Country	IB Products
2391 L Street	95106	San Jose	Santa Clara	CA	US		
CRM	95053	San Jose	Santa Clara	CA	US		

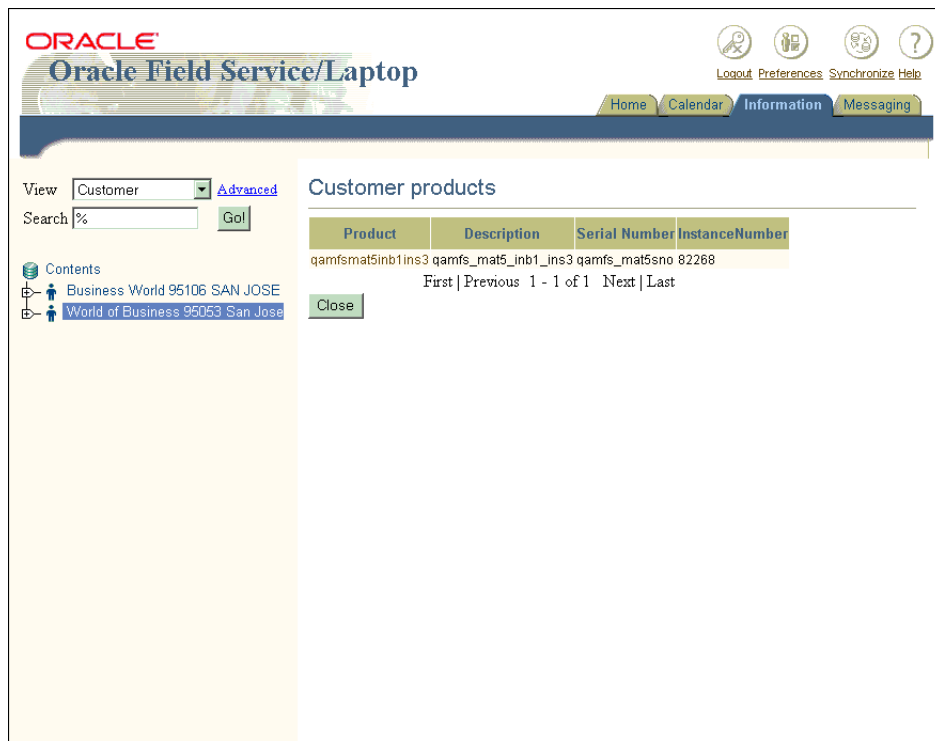
First | Previous 1 - 2 of 2 Next | Last

Notes

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

- To view the customer product information for the customer, click on the person icon for the desired customer location.

The Information page displays the Customer Products view. This view lists all the customer products for the customer.



6. Click **Close** to exit the Customer Products view.
7. In the Information page (Customer Details view), click **Notes** to view existing customer notes or to add a new customer note.

See "[Creating and Viewing Notes](#)" on page 3-47 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. Also, you are able to view the configuration of the customer product. Finally, 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.

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. Utility icons for Logout, Preferences, Synchronize, and Help are in the top right. The main content area is titled 'Installed Base details' and shows the following information:

- Product Number:** AS54888
- Description:** Sentinel Standard Desktop
- Serial Number:** (blank)
- InstanceNumber:** 71974
- Context Value:** qamfs g 1, qamfs g 2, qamfs g 3
- Location:**
  - Address1: 2391 L STREET
  - Address2: (blank)
  - Address3: (blank)
  - Address4: (blank)
  - City: SAN JOSE
  - County: Santa Clara
  - State: CA
  - Country: US
  - Postal Code: 95106
  - Province: (blank)
- Product:**
  - Revision: (blank)
  - Installation Date: (blank)

At the bottom of the details section are 'Notes' and 'Configuration' buttons. On the left side, there is a 'Contents' tree with a search bar and a 'Go!' button. The search bar contains a '%' character. The tree shows a hierarchy starting with 'AS54888', which includes 'HP Printer' and three sub-items labeled 'AS54888'.

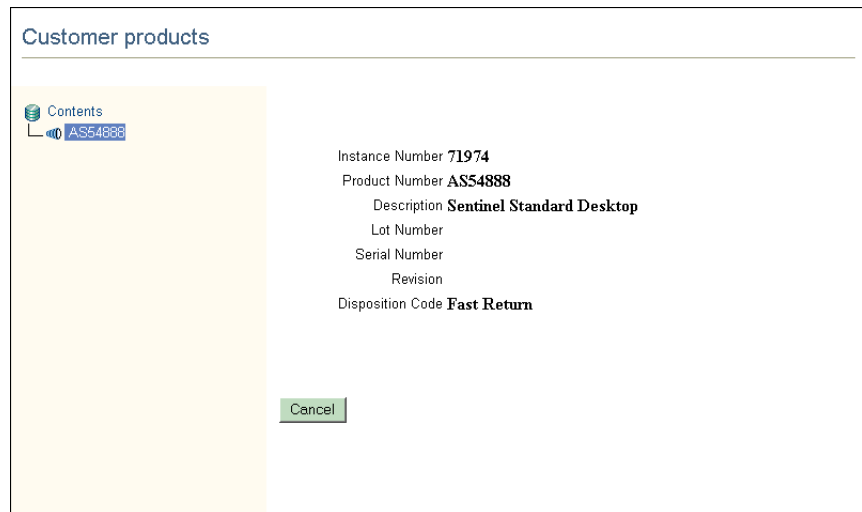
5. Click **Configuration**.

The Customer Products window opens.



6. Select the desired service request.

The Customer Products window displays a customer product description.



7. Click **Cancel** to return to the Information page (Installed Base Details view).
8. Click **Notes** to view existing customer product notes or to add a new customer product note.

See ["Creating and Viewing Notes"](#) on page 3-47 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 3-6 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.

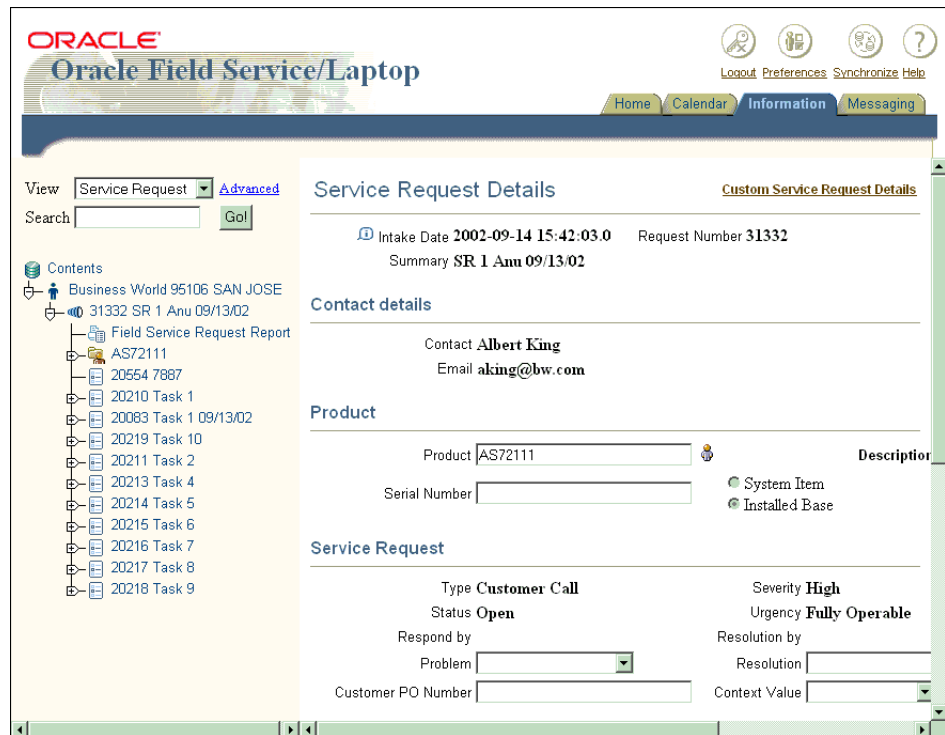
- Complete one or more fields and then click **Search**.

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 Product header, you can enter or change information for the following:
  - Product field—click the person icon next to this field to specify a new or different customer product. The Information page displays the Customer Products view.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there is a navigation bar with 'Home', 'Calendar', 'Information', and 'Messaging' tabs. Below the navigation bar, there is a search area with a 'View' dropdown set to 'Task' and a 'Search' field. A 'Contents' tree on the left lists various service requests, with '13434 Hard Drive making noise' selected. The main area displays 'Customer products' with a table containing one row of product information.

Product	Description	Serial Number	InstanceNumber
AS54888	Sentinel Standard Desktop		71974

Below the table, there is a 'Close' button and pagination controls: 'First | Previous 1 - 1 of 1 Next | Last'.

Click the desired product code.

The Information page displays the Service Request Details view, with the new product information in the Product field and Description drop-down list. Click **Close** to exit the Customer Products view without selecting a customer product.

- Serial Number field—enter the serial number of the customer product specified in the Product field and Description drop-down list.
  - System Item and Installed Base radio buttons—specify the type of customer product you specified in the Product field and Description drop-down list.
6. 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 3-38.

To create a service request note, click **Note**. See "[Creating and Viewing Notes](#)" on page 3-47 for a complete description of this procedure.

To create a task, click **Create Task**. See "[Creating a Task](#)" on page 3-44 for a complete description of this procedure.

To view the service history, click **Service History**. See "[Viewing Service History](#)" on page 3-40 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:

- 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.

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

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

- Click **Create Service Request**.

The Information page displays the Create Service Request view.

**ORACLE**  
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar **Information** Messaging

View Customer [Advanced](#)

Search %

Contents

- Costco Wholesale Corp. 99027 Issac
- Paul Hunter 94404 Foster City

### Create Service Request

Use the following request as template

Party Name **Costco Wholesale Corp.** Party Number **1280**  
 Caller Type **ORGANIZATION**

Request Date **07-Nov-2002** Request Number

\*Type  \*Severity   
 \*Status  Urgency   
 Problem  Resolution   
 PO Number   
 \*Summary

Install Base Product

Product   Description   
 Serial Number  Installation Date   
 Install Address

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. To change the defaults in the Type, Status, Severity, and Urgency drop-down lists, 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 3-30 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 3-30 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. The top navigation bar includes Home, Calendar, Information (selected), and Messaging. 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** (selected in a drop-down menu)

Below this information is a section titled "Transaction billing types" which contains a table with the following data:

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 only be 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 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 3-87 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 3-30 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 shows the Oracle Field Service/Laptop interface. At the top, there's a navigation bar with 'Home', 'Calendar', 'Information', and 'Messaging'. The main content area is titled 'Type Customer Call' and includes fields for 'View' (Service Request), 'Status' (Open), 'Severity' (High), 'Urgency' (Fully Operable), 'Problem' (Mechanical Problem), and 'Resolution' (Solution to Mechanical). There are also input fields for 'Customer PO Number', 'Steve's Flexfield\_1' through '5', 'Daves Flexfield', and 'Test diff field'. A 'Credit Card details' section contains fields for 'Credit Card Number', 'New Credit Card Number', 'Credit Card Type', 'Expiration Date', 'First Name', 'Last Name', and 'Middle Name'. At the bottom, there are buttons for 'Notes', 'Save', 'Create Task', and 'Service History'. A left-hand navigation pane shows a tree view of service requests, with 'Costco Wholesale Corp. 98027 Issaq' 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 3-47 for a complete description of this procedure.

To create a task, click **Create Task**. See "[Creating a Task](#)" on page 3-44 for a complete description of this procedure.

To view service history, click **Service History**. See "[Viewing Service History](#)" on page 3-40 for a complete description of this procedure.

### 3.4.3.5 Viewing Service History

To best service the customer, field service representatives 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 3-30 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. At the top, the Oracle logo is on the left, and navigation icons for Logout, Preferences, Synchronize, and Help are on the right. Below the logo is the title "Oracle Field Service/Laptop" and a navigation bar with buttons for Home, Calendar, Information, and Messaging. The main content area is divided into two columns. The left column contains a search bar with "110020" entered, a "Go!" button, and a "Contents" section with a tree view showing "Business World 95106 SAN JOSE" and a sub-item "110020 srib 1 b lap". The right column is titled "Service History" and shows details for a service request: Name "Business World", Address "2391 L STREET", City "SAN JOSE", Contact "Andre Beaulie", and Postal Code "95106". Below this is a "Previous Requests" table with columns for Intake Date, Request, Product, Serial, Problem, Resolution, and Details. The table lists five requests from January 2003, all with the same product (QP-LPTR-103) and problem/resolution codes. A "Close" button is located below the table.

**Service History**

Name **Business World** Contact **Andre Beaulie**  
 Address **2391 L STREET** Postal Code **95106**  
 City **SAN JOSE** Phone

**Previous Requests**

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	

First | Previous 1 - 5 of 5 Next | Last

Close

### 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 3-6 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 3-5)
- Using the Quick Find function from the Home, Calendar, and Messaging pages (see "[Using the Quick Find Function](#)" on page 3-86)

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.

**ORACLE**  
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View: Task [Advanced](#)

Search: %

**Contents**

- Business World 95106 SAN JOSE
  - 10525 Laptop not fitting docking
  - Field Service Request Repo
  - 15650 Extended Notebook f
  - AS92689
  - 12672 laptop not fitting dock
  - 12672 laptop not fitting dock
  - 11741 cd rom is stuck in drive
  - Field Service Request Repo
  - 15649 Extended Notebook f
  - AS54888
  - 14784 replace cd rom
  - 13434 Hard Drive making noise
  - Field Service Request Repo
  - 15649 Extended Notebook f
  - AS54888
  - 15365 Repair Hard Drive
  - 15366 Repair power unit
- World of Business 95053 San Jose
  - 1343 Hard drive not working. Us
  - Field Service Request Repo

**Task Details** [Quick Debrief](#)

Task Number **12672**  Escalated

Name **laptop not fitting docking station** Task Description

**Location**

Address1 **2391 L STREET** County **Santa Clara**

Address2 State **CA**

Address3 Country **US**

Address4 Zip code **95106**

City **SAN JOSE** Province

**Task**

\*Task Type  Task Status

Planned Start Date    Priority

Planned End Date    \*Planned Effort

Scheduled Start Date

Scheduled End Date

Context Value

qarfs g 1

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

- To access Quick Debrief, click on the Quick Debrief link.

See "[Using Quick Debrief](#)" on page 3-10 for a complete description of this procedure.

- In the Information page (Task Details view), under the Task header, ensure that the values in the fields and drop-down lists are correct.

---

**Note:** The fields and drop-down lists under the Task header are enabled as long as Cancelled or Completed is not specified in the Assignment Status drop-down list.

---

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 3-36 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 and Deleting a Time Report Item](#)" on page 3-50 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.

7. Under the Task Assignment header, ensure that the selection in the Assignment Status drop-down list is correct.

---

---

**Note:** The fields and drop-down lists under the Task Assignment header are enabled as long as Cancelled or Completed is not specified in the Assignment Status drop-down list.

---

---

8. Click **Notes** to view any existing task notes or to add a new task note.  
See "[Creating and Viewing Notes](#)" on page 3-47 for a complete description of this procedure.
9. 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 3-30 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.

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. Utility icons for Logout, Preferences, Synchronize, and Help are also present.

The main content area is divided into several sections:

- View:** A dropdown menu set to "Service Request" with an "Advanced" link and a "Go!" button.
- Search:** A search box with a percentage sign and a "Go!" button.
- Contents:** A tree view showing a customer "Costco Wholesale Corp. 98027 Issaq" with several service requests listed, including "1000001000026 Do a good job!".
- Product:** Details for "Product AS18947" with description "Sentinel Deluxe Desktop". Radio buttons for "System Item" and "Installed Base" are shown.
- Service Request:** Details for a "Customer Call" with status "Open", severity "High", and urgency "Fully Op". The problem is "Mechanical Problem".
- Credit Card details:** Fields for Credit Card Number, Type, First Name, Middle Name, New Credit Card Number, Expiration Date, and Last Name.

At the bottom, there are buttons for "Notes", "Save", "Create Task", and "Service History".

- 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.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there's a navigation bar with 'Home', 'Calendar', 'Information', and 'Messaging'. Below that, the 'Create Task' view is active. It features a search bar with a 'Go!' button and a 'Contents' tree on the left. The main form area contains fields for 'Planned Start Date', 'Planned End Date', 'Start Time', 'End Time', 'Type', 'Status', 'Duration', and 'Priority'. A 'Create' button is located at the bottom right of the form.

**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.

---

---

**Note:** A task that has the status of `Assigned` is automatically assigned to you, provided that this feature was implemented at setup. You can work on these tasks immediately, including entering debrief reports.

---

---

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 3-42 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 3-30 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 3-42 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 3-22 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 3-26 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	<a href="#">customer note 2 b pa</a>	Armstrong, Mr. Billie Joe	qa note type 1	Public
06-Nov-2002	Party	<a href="#">customer note 1 b pa</a>	Gasemgr, Steve	qa note type 1	Public
06-Nov-2002	Party	<a href="#">customer note 2 b la</a>	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 \_\_\_\_\_

Note

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

- 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	<a href="#">customer note 2 b pa</a>	Armstrong, Mr. Billie Joe	qa note type 1	Public
06-Nov-2002	Party	<a href="#">customer note 1 b pa</a>	Gasemgr, Steve	qa note type 1	Public
06-Nov-2002	Party	<a href="#">customer note 2 b la</a>	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".

---

---

5. From the Note status drop-down list, select the not status.
6. In the Note field, enter the note text.
7. 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.

8. 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 field service representatives record any or all of the above information, they 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 and Deleting a Time Report Item

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

For a locally created time report item that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete this report item from the time report.

---

---

**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 3-42 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 item:

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 3-42 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. This view contains default values for the Business Process, Labor Type, Labor Item, and UOM drop-down lists along with the Start Time and End Time fields.

**Oracle Field Service/Laptop**

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View: Task [Advanced](#)

Search: %

Contents

- AT&T Universal Card 32209 Jacksc
- 1000003000019 sdgfsdg
  - Field Service Request Repo
  - 32516 adsdasd
- 1000013000019 Terminal connec
  - Field Service Request Repo
  - AS54688
  - 1000019000019 Repair print
  - 1000018000019 Test
- 117658 test
  - Field Service Request Repo
  - AS62444
  - 35389 Fix Laptop
    - Time reporting**
    - Material reporting
    - Expense reporting
    - Field Service Task Repo
  - 33714 test
  - 11968 TEST
  - Field Service Request Repo

**Time Reporting**

\*Business Process: Customer Support

\*Labor Type: ABOrder

\*Labor Item: Labor\_Item\_QA\_102 (QA)

\*Start Time: 27-May-2003 00:00

\*End Time: 27-May-2003 00:00

Duration:

\*UOM: Each

**Summary of reported labor**

	Business Process	Labor Type	Labor Item	Time Begin	Time End	Duration	UOM
<input type="checkbox"/>	Customer Support		qa labor item 2 (hour)	1904-01-01 00:00	1904-01-01 04:00	4	Hour
<input type="checkbox"/>	Field Service	Labor Transaction	Labor_Item_QA_104	2003-04-29 08:30	2003-04-29 09:30	-99999	Each
<input type="checkbox"/>	Customer Support	ABOrder	Labor_Item_QA_104	2003-05-06 09:00	2003-05-06 10:00	-99999	Each
<input type="checkbox"/>	Field Service	Labor Transaction	Labor_Item_QA_102	2003-05-20 02:00	2003-05-20 03:15		

First | Previous 1 - 4 of 4 Next | Last

**Note:** The Business Process, Labor Type, and Labor Item drop-down lists are mandatory. To specify the length of the task, *either* the Start Time and End Time fields are mandatory *or* the Duration field and UOM drop-down list are mandatory. Specify the length of time using one of these pairs, but not both.

- To change the default business process, Customer Support, make the appropriate selection from the Business Process drop-down list.
- To change the default labor type, make the appropriate selection from the Labor type drop-down list.
- To change the default labor item, make the appropriate selection from the Labor item drop-down list.

In the following steps, specify the amount of labor time used to complete the task. Complete *either* steps 8 and 9 *or* steps 10 and 11, according to your business process.

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 3-9.

- 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 end 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 3-9.

- 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 Duration field, enter the length of time the task took to complete.

11. From the UOM drop-down list, select the unit of time that describes the value in the Duration field.

12. Click **Add**.

The time report item is saved to your laptop computer. In the Summary of Reported Labor table, the new time report item is now listed.

To delete the newly created time report item, select the time report item and then click **Delete selected**.

### 3.4.6.2 Creating and Deleting a Material Report Item

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 customer's 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.

For a locally created material report item that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete this report item from the material report.

### Steps

Complete the following steps to create a material report item:

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 3-42 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. There are two versions of this view: one for recovered parts and the other for used parts. In both versions, there are default values for the Business Process and Transaction Type drop-down lists.

**ORACLE**  
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View: Task [Advanced](#)

Search:

**Material Reporting**

\*Business Process: Field Service \*Service Activity Code: Field Service Return

**Recovered part**

\*Item:  \*Description:   
 Serial Number:  \*Service Date: 11-Nov-2003  
 \*Quantity:  \*UOM:   
 \*Inventory: Field Service Truck 9 Locator:   
 \*Instance Number:  Parent Instance Number:   
 Reason:  Disposition Code:   
 Return Reason:

**Summary of reported materials**

Service Status	Activity Code	Product	Description	Inventory	Locator Id	Quantity	UOM	Reason	Disposition Code	Ser Da
First   Previous 0 - 0 of 0 Next   Last										

- To change the default business process, Customer Support, make the appropriate selection from the Business Process drop-down list.

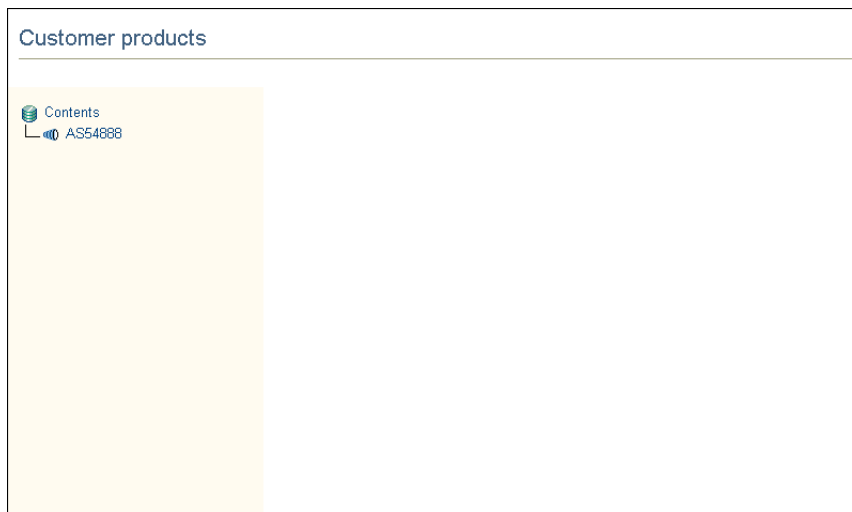
The business process selection determines the selection in the Transaction Type drop-down list. The selection in this drop-down list determines whether fields and drop-down lists for a used or recovered part appear in the Material Reporting view.

- To change the default transaction type, make the appropriate selection from the Transaction Type drop-down list.
- Click **Find** to locate and select the part.

If you have enough information to describe the part, you can complete the mandatory fields and any other fields and then click **Add**. (Mandatory fields are denoted with an asterisk [\*])

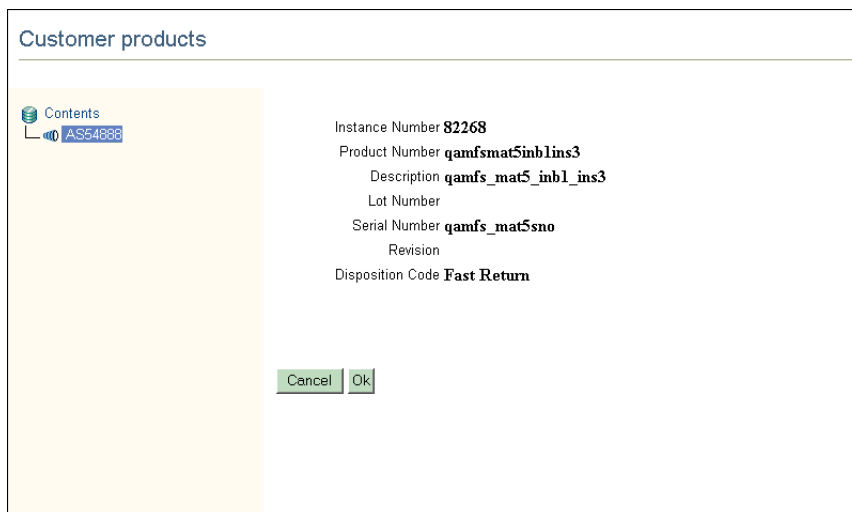
After you click **Find**, either the Information page displays the Search Materials view or the Customer Products window opens. If you are searching for a recovered install-base part, then the Customer Products window opens.

*Selecting a Recovered Install Base Part*



- Select the desired service request.

The Customer Products window displays a recovered install base part.



- Click **OK**.

The recovered install base part appears in the Information page (Material Reporting view) under the Recovered Part header.

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. Utility icons for Logout, Preferences, Synchronize, and Help are present in the top right.

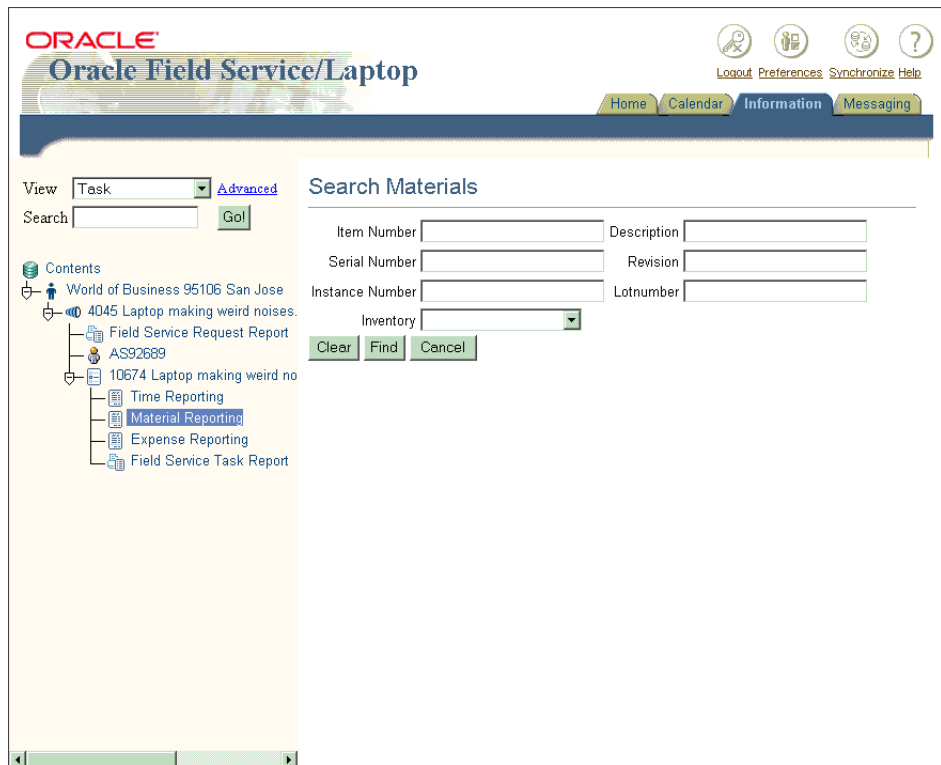
The main content area is titled 'Material Reporting'. It features a search bar with a 'View' dropdown set to 'Customer' and a 'Go!' button. A 'Contents' sidebar on the left shows a tree view with 'Material Reporting' selected. The main form contains the following fields:

- \*Business Process: Field Service
- \*Service Activity Code: Field Service Return
- Recovered part** section:
  - \*Item: qamfsmat5inb1ins3
  - \*Description: qamfs\_mat5\_inb1\_ins3
  - Serial Number: qamfs\_mat5sno
  - \*Service Date: 14-Nov-2003
  - \*Quantity: 1
  - \*UOM: Each
  - \*Inventory: qamfs\_sub1
  - Locator: (dropdown)
  - \*Instance Number: 82268
  - Parent Instance Number: (dropdown)
  - Reason: (dropdown)
  - Disposition Code: Fast Return
  - Return Reason: (dropdown)

Buttons for Find, Clear, and Add are located below the form fields. A 'Summary of reported materials' section is visible at the bottom of the form area.

- Proceed to step 8.

*Selecting a Part that is Not Recovered and Install Base*



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

The Search Results section appears in the Search Materials view of the Information page. This section displays all the possible parts for the task.

The screenshot displays the Oracle Field Service/Laptop application 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 is present with a 'Go!' button. A left-hand navigation pane shows a tree structure of tasks and reports, with 'Material Reporting' highlighted. The main area is titled 'Search Materials' and contains a search form with fields for Item Number, Description, Serial Number, Revision, Instance Number, Lotnumber, and Inventory. Below the form are 'Clear', 'Find', and 'Cancel' buttons. A table of search results is displayed below the form.

Item	Description	Serial Number	Quantity	UOM	Inventory	Instance Number	Trackable Flag
AS18947	Sentinel Deluxe Desktop		50	Each	Field Service Truck 9		N
AS18947	Sentinel Deluxe Desktop		50	Each	Field Service Truck 8		N
AS18947	Sentinel Deluxe Desktop		50	Each	Field Service Truck 7		N
AS18947	Sentinel Deluxe Desktop		37	Each	Field Service Truck 6		N
AS54888	Sentinel Standard Desktop		49	Each	Field Service Truck 9	50455	Y
AS54888	Sentinel Standard Desktop		50	Each	Field Service Truck 8	50454	Y
AS54888	Sentinel Standard Desktop		46	Each	Field Service Truck 6	50452	Y
CM08512	RAM - 512MB		100	Each	Field Service Truck 6		N
CM08512	RAM - 512MB		125	Each	Field Service Truck 6		N

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 Search Materials view closes and the selected part appears in the Material Reporting view under the Used Part header or Recovered Part header, depending on the type of material report item you are reporting.

**ORACLE**  
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

View: Task [Advanced](#)

Search:

Contents

- World of Business 95106 San Jose
  - 4045 Laptop making weird noises.
    - Field Service Request Report
    - AS92689
      - 10674 Laptop making weird no
        - Time Reporting
        - Material Reporting**
        - Expense Reporting
        - Field Service Task Report

**Material Reporting**

\*Business Process: qamfs field service \*Service Activity Code: qamfs mat order ib

**Used part**

\*Item: AS18947 \*Description: Sentinel Deluxe Desktop

Serial Number:  \*Service Date: 12-Nov-2003

\*Quantity: 1 \*UOM: Each

\*Inventory: Field Service Truck 9

Reason:

**Summary of reported materials**

Status	Service Activity Code	Product	Description	Inventory	Locator Id	Quantity	UOM	Reason	Disposition Code	Service Date

First | Previous 0 - 0 of 0 Next | Last

- In the Serial Number field of the Information page (Material Reporting view), enter an optional serial number for the part.

Add the serial number for a part that is serial-number based and has no serial number allocated to the item instance.

- Click **Add** to add the selected material report item to the material report.

The material report item is saved to your laptop computer. The Information page (Material Reporting view) displays the part, along with a detailed description in the Summary of Reported Materials table. In this case, Item AS18947 is saved and added to the Summary of Reported Materials table.

To remove the selected part description from the Material Reporting view, click **Clear** instead of **Add**.

The screenshot shows the Oracle Field Service/Laptop interface. The top navigation bar includes 'Home', 'Calendar', 'Information' (selected), and 'Messaging'. The main content area is titled 'Material Reporting' and contains several input fields and a table.

**Material Reporting Form Fields:**

- View: Task (dropdown), [Advanced](#)
- Search: [ ] Go!
- \*Business Process: Field Service (dropdown)
- \*Service Activity Code: Field Service Return (dropdown)
- Recovered part**
- \*Item: [ ]
- \*Description: [ ]
- Serial Number: [ ]
- \*Service Date: 12-Nov-2003
- \*Quantity: [ ]
- \*UOM: [ ]
- \*Inventory: Field Service Truck 9 (dropdown)
- Locator: [ ]
- \*Instance Number: [ ]
- Parent Instance Number: [ ]
- Reason: [ ]
- Disposition Code: [ ]
- Return Reason: [ ]
- Buttons: Find, Clear, Add

**Summary of reported materials table:**

Status	Service Activity Code	Product	Description	Inventory	Locator Id	Quantity	UOM	Reason	Disposition Code
<input type="checkbox"/> Used	qamfs mat	AS18947	Sentinel Deluxe Desktop	FS_Truck9		1	Each		

To delete the newly created material report item, select the material report item from the Summary of Reported Materials table and then click **Delete selected**.

### 3.4.6.3 Creating and Deleting an Expense Report Item

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.

For a locally created expense report item that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete this report item from the expense report.

#### Steps

Complete the following steps to create an expense report item:

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

2. Choose the desired task for which you want to create a expense report item.  
See "[Viewing and Changing Task Information](#)" on page 3-42 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**.

The Information page displays the Expense Reporting view. This view contains default values for the Business Process, Expense Type, Expense Item, UOM, and Currency drop-down lists.

**Oracle Field Service/Laptop**

Home Calendar **Information** Messaging

View: Task [Advanced](#)  
Search: %

**Contents**

- AT&T Universal Card 32209 Jacksc
- 1000003000019 sdgfsdg
  - Field Service Request Repo
  - 32516 adsdasd
- 1000013000019 Terminal conn
- Field Service Request Repo
- AS54888
- 1000019000019 Repair print
- 1000018000019 Test
- 117658 test
  - Field Service Request Repo
  - AS62444
  - 35389 Fix Laptop
    - Time reporting
    - Material reporting
    - Expense reporting**
    - Field Service Task Repo
- 33714 test
- 11968 TEST
  - Field Service Request Repo
  - AS54888
  - 29551 Test

**Expense Reporting**

\*Business Process: Customer Support  
 \*Expense Type: 1EH old disregard  
 \*Expense Item: qa expense item (dollars)  
 Quantity:   
 Cost:   
 \*UOM: Dollars  
 \*Currency: ANY Currency

**Summary of reported expenses**

Business Process	Service Activity Code	Expense Item	Quantity	UOM	Cost	Currency
First   Previous 0 - 0 of 0 Next   Last						

---

---

**Note:** The Business Process, Expense Type, and Expense Item drop-down lists are mandatory. To specify the expense of the task, *either* the Quantity field and UOM drop-down list are mandatory *or* the Cost field and Currency drop-down list are mandatory. Specify the expense using one of these pairs, but not both.

---

---

5. To change the default business process, Customer Support, make the appropriate selection from the Business Process drop-down list.
6. To change the default expense type, make the appropriate selection from the Expense Type drop-down list.
7. To change the default expense item, make the appropriate selection from the Expense Item drop-down list.

8. Specify the cost and currency that describes the expense.

The Quantity field and UOM drop-down list are used together while the Cost field and Currency drop-down list are paired together. In your description, complete only *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.
9. Click **Add** to add the selected expense report item to the expense report.

The expense report item is saved to your laptop computer. The Information page (Expense Reporting view) displays the part, along with a detailed description in the Summary of Reported Expenses table.

Click **Clear** to remove the selected part description from the Expense Reporting view.

Oracle Field Service/Laptop

Home Calendar Information Messaging

View: Task [Advanced](#)

Search: %

Contents

- AT&T Universal Card 32209 Jacksc
- 1000003000019 sdgfsdg
  - Field Service Request Repo 32516 adsdasd
- 1000013000019 Terminal connec
  - Field Service Request Repo AS54888
  - 1000019000019 Repair print
  - 1000018000019 Test
- 117658 test
  - Field Service Request Repo AS62444
  - 35389 Fix Laptop
    - Time reporting
    - Material reporting
    - Expense reporting
    - Field Service Task Repo
- 33714 test
- 11968 TEST
  - Field Service Request Repo AS54888
  - 29551 Test

\*Business Process: Customer Support

\*Expense Type: 1EH old disregard

\*Expense Item: qa expense item (dollars)

Quantity:

UOM: Dollars

Cost:

\*Currency: ANY Currency

Summary of reported expenses

Business Process	Expense Type	Expense Item	Quantity	UOM	Cost	Currency
<input type="checkbox"/> Customer Support	1EH old disregard	qa expense item (dollars)	12	Dollars		

First | Previous 1 - 1 of 1 Next | Last

To delete the newly created expense report item, select the expense report item and then click **Delete selected**.

### 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 3-30 for a complete description of this procedure.

- 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.

- 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

**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
19583	Transaction	(Labor Item) 27 00:00			21	31
19583	Return for Repair	Labor Item 2002-08-27 01:00	2002-08-27 01:00			
19583	Labor	Labor Item 2002-09-17 15:00	2002-09-17 16:00		31	51
19583	Transaction	(Labor Item) 21 21:00			100	150
19583	Return for Repair	Labor Item 2002-09-21 22:00	2002-09-21 22:00			

**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 shows the Oracle Field Service/Laptop interface. The top navigation bar includes 'Home', 'Calendar', 'Information' (selected), and 'Messaging'. The main content area displays a task report for 'Summary test' with a 'Type' of 'Customer Call' and 'Severity' of 'High'. The report is divided into sections: 'Reported time', 'Reported material', and 'Reported expenses'. A 'Sign off' section is also present with fields for 'Name' and 'Date' (01-Jul-2003).

**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 Modifier
    - 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

**Summary test**  
 Type **Customer Call** Severity **High**

**Reported time**

Task Number	Service Activity Code	Labor item	Start	End	Duration	UOM
14162		Labor Transaction			2	Volts

**Reported material**

Task Number	Service Activity Code	Status	Product	Description	Serial number	Inv
14162	qamfs mat order noib	Used	AS65102	Vision Pad - Silver		qam

**Reported expenses**

Task Number	Service Activity Code	Expense item	Expense Amount	Currency Code	OU
-------------	-----------------------	--------------	----------------	---------------	----

**Sign off**

Name \_\_\_\_\_  
 Date 01-Jul-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 3-42 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, material, and expenses. The customer and task details are also shown. The customer name, current date, and space for a signature appear at the bottom of the Field Service Task Report for customer sign off.

The screenshot displays the Oracle e-businesssuite interface for Field Service/Laptop. The top navigation bar includes 'Home', 'Calendar', 'Information', and 'Messaging'. The main content area is divided into several sections:

- Customer details:**
  - Name: **Costco Wholesale Corp.**
  - Contact: **James Jackson**
  - Address: **PO Box 34331**
  - Postal Code: **98027**
  - City: **Issaquah**
  - 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:** (Table with columns: Task, Labor type, Labor item, Start, End, Start, End)

On the left side, a 'Contents' tree shows the navigation path: Costco Wholesale Corp. 98027 Issaquah > 1000001000026 Do a good job. > 1000002000026 This field is not bl > 27934 Problem resolution Modific > 19583 task1 > **Field Service Task Report**.

**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 msan
  - 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 (Labor Item)	2002-08-22 00:00	2002-08-22 04:00	1	11
19583	Return for Repair	Labor Item (Labor Item)	2002-08-27 00:00	2002-08-27 01:00	21	31
19583	Labor Transaction	Labor Item (Labor Item)	2002-09-17 15:00	2002-09-17 16:00	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	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](#)

Scheduled start: 2003-JUN-24 03:03  
Priority: Medium  
Scheduled end: 2003-JUN-24 03:00

Search: %

**Contents**

- Costco Wholesale Corp. 98027 Issaquah
  - 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	Service Activity Code	Labor item	Start	End	Duration	UOM
14162		Labor Transaction			2	Volts

**Reported material**

Task Number	Service Activity Code	Status	Product	Description	Serial number	Inv
14162	qarnfs mat order noib	Used	AS65102	Vision Pad - Silver		qarr

**Reported expenses**

Task Number	Service Activity Code	Expense item	Expense Amount	Currency Code	Out
-------------	-----------------------	--------------	----------------	---------------	-----

**Sign off**

Name: \_\_\_\_\_  
Date: 01-Jul-2003

- 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 3-26 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 a "Go!" button. On the left, a "Contents" tree shows a hierarchy: AS18947, AS54888, AS92689, AS92689, NVidia GeForce 2MX, and Usage (selected). The main content area is titled "Counter readings" and contains a table with the following data:

Date	Reading	Misc. Reading	UOM	Pro Reset	Pre Reset
06-Mar-2002	6789		Ea		
06-Mar-2002	123123		Ea		
07-Mar-2002	8888	88	Ea		
08-Mar-2002	10000	10	Ea		
08-Mar-2002	1500	15	Ea	1500	12000
22-Mar-2002	100	75	Ea		
26-Mar-2002	60	10	Ea	5	5
27-Mar-2002	333		Ea		

Below the table, there are navigation links: "First | Previous 1 - 8 of 8 Next | Last" and a "New Reading" button.

5. Click **New Reading**.

The Information page displays the Counter Reading view.

The screenshot shows the Oracle Field Service/Laptop interface. The main title is "Oracle Field Service/Laptop". The navigation bar includes "Home", "Calendar", "Information", and "Mes". The "View" dropdown is set to "Customer Product" with an "Advanced" link. A search bar contains a percent sign and a "Go!" button. The left sidebar shows a tree view with "Contents" and several items: AS54888 (HP Printer), AS54888, AS72111, AS92689, and AS92689. The main form area is titled "Counter reading" and contains the following fields:

- Counter Name: HP Printer
- Date: 28-Jan-2003 (with a calendar icon)
- Reading: (empty field)
- Misc Reading Type: (drop-down menu)
- Misc. Reading: (empty field)
- Unit Of Measure: Ea
- Reset Flag: (checkbox)
- Pre-reset last reading: (empty field)
- PostReset First Reading: (empty field)
- Reset Reason: (empty text area)

Below the form is a "Counter values" section with a table:

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

At the bottom of the form are "Save" and "Cancel" buttons.

- 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.
- 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 Mobile Field Service/Laptop interface. At the top, there is a navigation bar with 'Home', 'Calendar', 'Information', and 'Messaging' tabs. Below the navigation bar, there is a search bar with a 'Go!' button and a 'View' dropdown menu set to 'Customer Product'. A tree view on the left shows a hierarchy of assets, including 'HP Printer' under 'AS54888'. The main content area displays a table of counter readings for a specific asset.

Date	Reading	Misc. Reading	UOM	Pro Reset	Pre Reset	Reset Flag	Details
22-Jan-2003 24:00	1990		109 Ea				

Navigation links: First | Previous 1 - 1 of 1 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 order parts from inventories assigned to you and those that are not assigned to you (sub-inventories). The latter case requires you to do an advanced search where you supply specific information about the desired part.

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

---

---

**Note:** You can specify an inventory not assigned to you if it contains the desired part. In this case, continue with the following steps to narrow the search.

---

---

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.

The screenshot shows the Oracle Field Service/Laptop application interface. At the top, there is a navigation bar with 'Home', 'Calendar', 'Information', and 'Messaging' buttons. Below the navigation bar, there is a search area with a 'View' dropdown set to 'Inventory' and a search box containing '%'. The search results are displayed in a table with the following columns: Select, Item, Description, Serial Number, Inventory, Quantity, Uom, Revision, and Lot Number. The table contains four rows of results for 'AS18947 - Sentinel Deluxe Desk' with quantities of 37, 50, 50, and 50 respectively. Below the table, there are 'Order' and 'Transfer' buttons. On the left side, there is a 'Contents' tree view with a list of items, including 'AS18947 - Sentinel Deluxe Desk' which is currently selected.

Select	Item	Description	Serial Number	Inventory	Quantity	Uom	Revision	Lot Number
<input type="radio"/>	AS18947	Sentinel Deluxe Desktop		FS_Truck6	37	Each		
<input type="radio"/>	AS18947	Sentinel Deluxe Desktop		FS_Truck7	50	Each		
<input type="radio"/>	AS18947	Sentinel Deluxe Desktop		FS_Truck8	50	Each		
<input type="radio"/>	AS18947	Sentinel Deluxe Desktop		FS_Truck9	50	Each		

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 3-77 for a complete description of this procedure.

The screenshot shows the Oracle Field Service/Laptop interface. At the top, there's a navigation bar with 'Home', 'Calendar', 'Information', and 'Messaging'. Below this, the 'Order an Item' form is displayed. The form includes a search bar with 'View' set to 'Inventory' and a 'Go!' button. The main form area shows 'Item Number AS18947' and 'Description Sentinel Deluxe Desktop'. Under 'Shipment details', there are fields for 'Quantity', 'UOM' (set to 'Bag'), 'Subinventory' (set to 'FS\_Truck6'), and 'Shipment location' (set to '450 Churchill Ave., PALO ALTO, CA 94301'). There are 'Restore' and 'Save' buttons. On the left, a 'Contents' tree lists various components, with 'AS18947 - Sentinel Deluxe Desk' selected.

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 3-75 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.

The screenshot shows the Oracle Field Service/Laptop interface. The top navigation bar includes 'Home', 'Calendar', 'Information' (selected), and 'Messaging'. The 'Information' page displays the 'Transfer Parts' view. On the left, a 'Contents' tree shows 'Stores' expanded with a list of items, including AS54888. The main area is titled 'Transfer Parts' and contains a 'New Transfer Line' form. The form fields are: Item (AS54888), Description (Sentinel Standard Desktop), Revision (A), Lotnumber, Serial Number, \*Subinventory (Stores Inventory), \*To subinventory, \*Quantity, \*UOM (Each), Reason, and Reference. There are 'Add' and 'Cancel' buttons below the form. Below the form is a 'Transfer Lines' table with columns: Item, Subinventory, To subinventory, Quantity, UOM, Reason, Reference. The table currently shows 0 of 0 items. Navigation links 'First | Previous', 'Next | Last' are visible at the bottom of the table.

Click **Order** to order a part. See "[Ordering a Part](#)" on page 3-75 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 application 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 is present with a 'View' dropdown set to 'Order' and a search field containing '%'. A 'Contents' sidebar on the left lists three items, with the first one selected. The main area shows 'Item Order details' for item number 75100001, including shipment details and shipment address.

Item Order details	
Item Number <b>75100001</b>	Description <b>Printer Mechanism</b>
Shipment details	
Quantity <b>1</b>	UOM <b>GRO</b>
Order need date	Subinventory <b>FS_Truck8</b>
Process status <b>New</b>	Order number -
Arrival date	Requirement number <b>1000002000002</b>
Shipment address	
Address 1 <b>393</b>	City <b>Foster City</b>
Address 2 <b>Bramble</b>	State <b>CA</b>
Postal Code <b>94404</b>	Country <b>US</b>

## 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 Viewing Received Messages

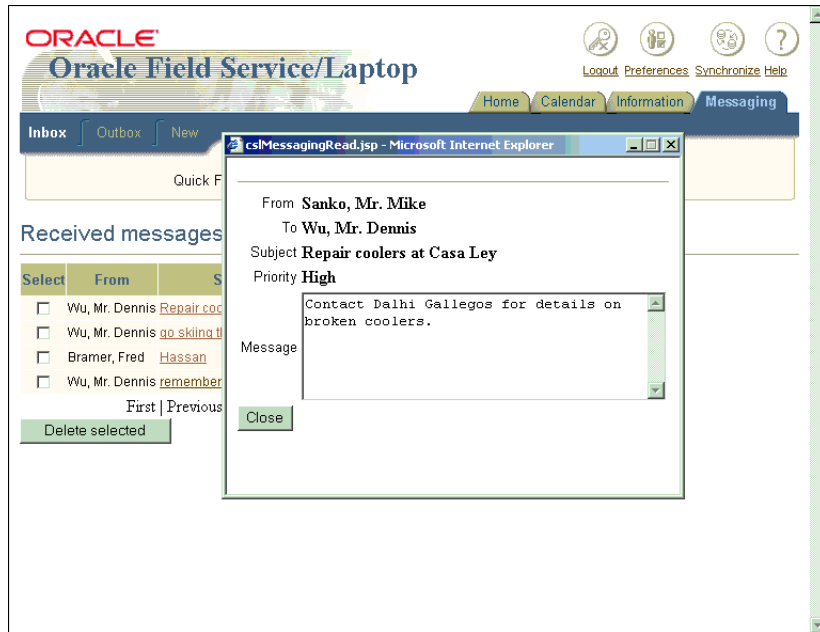
After you synchronize with the enterprise system, you can check to see if you have received any messages.

#### **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' form 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 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

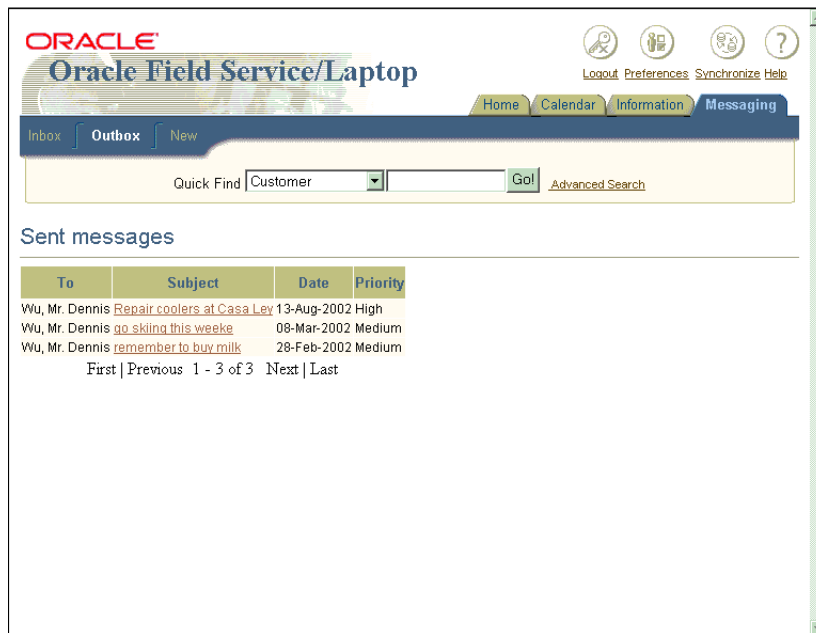
In the Messaging page, you can ensure that a message you wrote has been sent to the intended person(s) in your field service organization.

#### 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 is updated with the number of task at a particular status each time you synchronize with the enterprise system.

### Steps

Complete the following to access the Home page:

- Click the Home tab to open the Home page.

In this page, you can view the Tasks Summary table. This table lists how many tasks are at a particular status.

ORACLE  
Oracle Field Service/Laptop

Logout Preferences Synchronize Help

Home Calendar Information Messaging

Quick Find Customer  Go! Advanced Search

Welcome Dennis 19-Sep-2002 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

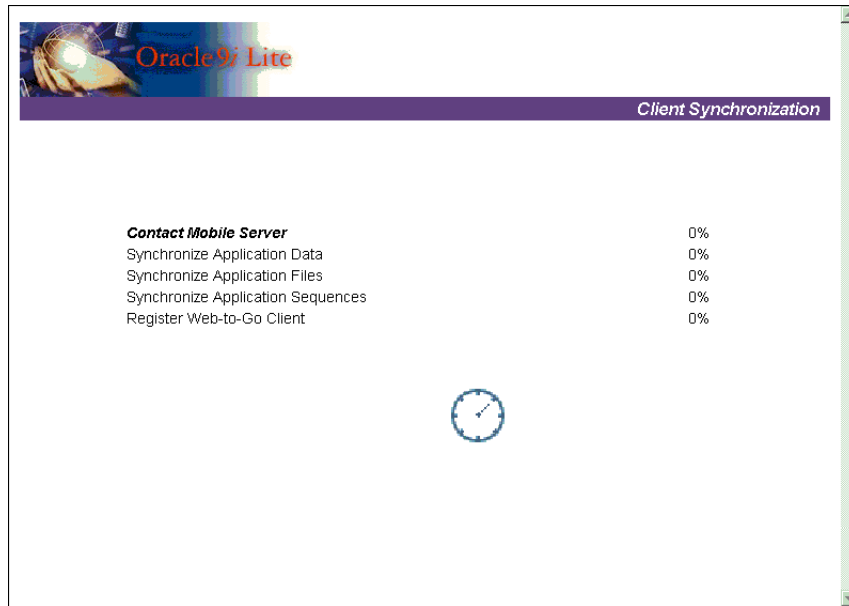
In order to receive new data assigned to you, such as new tasks and service requests, you need to synchronize with the enterprise system. Likewise, to send the changes that you have made, such as creating debrief lines and updating task statuses to the enterprise system, you need to synchronize with 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 Oracle9i Lite Client 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.

After synchronization completes, the browser displays the Oracle Mobile Field Service/Laptop Calendar page.

The screenshot displays the Oracle Field Service/Laptop application interface. At the top, the Oracle logo and the title "Oracle Field Service/Laptop" are visible. Navigation tabs include Home, Calendar (selected), Information, and Messaging. A search bar labeled "Quick Find" has "Customer" selected in the dropdown and a "Go" button. Below the search bar, the "Calendar: Daily View" section shows a date of "18-Oct-2000". A table lists tasks with columns for Request, Scheduled, Travel Time, Customer, Task Name, Task Number, Product, Status, and Quick Debrief.

Request	Scheduled	Travel Time	Customer	Task Name	Task Number	Product	*Status	Quick Debrief
4045	08:30		World of Business CRM San Jose	Laptop making weird noises. Feels hot when touched.	10674	Envoy Standard Laptop	Assigned	
4046	08:30		World of Business CRM San Jose	CD-Rom drive does not work. Need this to install critical applications.	10675	Sentinel Standard Desktop	Cancelled	
4146	11:00		World of Business CRM San Jose	Power module failed. Fix.	10713	Sentinel Standard Desktop	Assigned	

Navigation controls at the bottom of the table include "Update", "Create Personal Task", and pagination: "First | Previous 1 - 3 of 3 Next | Last".

### 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 field service representatives can exercise when doing their job.

### A.1 Conform to the Schedule

Field service representatives 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.

Field service representatives can complete their 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 field service representatives control over their 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. Field service representatives are expected to complete all the tasks on the day they were assigned. If they are unable to complete a scheduled task, they can reject it and then the dispatcher will re-schedule the task for the next day.

---

---

# Index

## A

---

Accepted task status, 3-8  
Assigned task status, 3-8  
Assignment Status drop-down list, 3-44

## B

---

Business Process drop-down list (Information screen, Expense Reporting), 3-15, 3-63  
Business Process drop-down list (Information screen, Time Reporting), 3-52, 3-55  
buttons  
Delete selected, 3-53, 3-61, 3-64

## C

---

Calendar page  
Create Personal Task view, 3-21  
Customer column, 3-7  
Daily View of the Calendar page, 3-21  
page shot, 3-5  
Product column, 3-7  
Request column, 3-7  
Scheduled column, 3-7  
Status column, 3-8  
Task Name column, 3-7  
Task Number column, 3-7  
Travel Time column, 3-7  
Calendar tab, 3-5, 3-6, 3-9, 3-21  
calendar window, 3-10  
Cancelled task status, 3-8  
check boxes  
Escalated, 3-43

Install Base Product, 3-36  
Reset Flag, 3-73  
Closed status, 3-51  
Closed task status, 3-8  
Completed task status, 3-8  
Computer Telephone Integration (CTI), 1-3  
Create Task view (Information page), 3-46  
Credit Card Details header, 3-39  
CTI, 1-3  
Currency drop-down list, 3-15, 3-63  
Customer column (Calendar page), 3-7  
Customer PO Number field, 3-34  
Customer Product selection, 3-27  
Customer selection, 3-23  
customer setup, 3-40

## D

---

Delete selected button, 3-53, 3-61, 3-64  
drop-down lists  
Assignment Status, 3-44  
Business Process drop-down list (Information screen, Expense Reporting), 3-15, 3-63  
Business Process drop-down list (Information screen, Time Reporting), 3-52, 3-55  
Currency, 3-15, 3-63  
Expense, 3-15, 3-63  
Misc. Reading Type, 3-73  
Note status, 3-50  
Note type, 3-49  
Problem, 3-33  
Quick Find, 3-86  
Reason, 3-79  
Resolution, 3-33

Severity, 3-36  
Status, 3-36, 3-47  
Status (Calendar page, Create Personal Task view), 3-21  
Transaction Type drop-down list (Information screen, Time Reporting), 3-55  
Transaction Type drop-down list (Quick Debrief page), 3-17  
Type, 3-36, 3-47  
Type (Calendar page, Create Personal Task view), 3-21  
UOM, 3-15, 3-63  
Urgency, 3-36  
Use the following task as template, 3-36, 3-46  
View (Information page), 3-23, 3-30, 3-31

## E

---

End Time field, 3-53  
enterprise system  
    adding a note, 3-50  
    Mobile Application Foundation, 1-3  
    task escalation, 3-43  
    updating the Home page, 3-85  
Escalated check box, 3-43  
Expense Type drop-down list, 3-15, 3-63

## F

---

fields  
    Customer PO Number, 3-34  
    End Time, 3-53  
    flexfields, 3-25, 3-34, 3-44  
    Labor item, 3-52  
    Labor type, 3-52  
    Name (Calendar page, Create Personal Task view), 3-21  
    Name (Information page, Create Task view), 3-47  
    Need by date, 3-77  
    Note, 3-50  
    Planned Effort, 3-44  
    Planned End Date, 3-44  
    Planned Start Date, 3-44  
    Scheduled End Date, 3-44

Scheduled Start Date, 3-44  
Start Time, 3-53  
Summary, 3-36  
flexfields, 3-25, 3-34, 3-44

## H

---

headers  
    Credit Card Details, 3-39  
    Service Request, 3-33  
    Summary of Reported Materials, 3-60  
    Task, 3-43  
    Task Assignment, 3-44  
Home page  
    page shot, 3-85  
Home tab, 3-85

## I

---

icons  
    person, 3-25, 3-32  
Inbox subtab, 3-81  
Information page  
    Contract Line Details view, 3-37  
    Create Service Request view, 3-35  
    Create Task view, 3-46  
    Customer Details view, 3-24  
    Expense Reporting view, 3-62  
    Material Reporting view, 3-54  
    Material Transaction view, 3-56  
    Service Request Details view, 3-31, 3-38, 3-42, 3-45  
    Task Details view, 3-42, 3-47  
    Time Reporting view, 3-51  
Information tab, 3-23, 3-30, 3-35, 3-36, 3-38, 3-40, 3-42, 3-45, 3-51, 3-54, 3-61, 3-64, 3-67, 3-71, 3-75, 3-78, 3-79  
Install Base Product check box, 3-36  
Internet Explorer, 2-2  
Inventory selection, 3-75

## L

---

Labor item field, 3-52  
Labor type field, 3-52

## M

---

Material reporting selection, 3-54  
Material Transaction view (Information page), 3-56  
Messaging tab, 3-81, 3-82, 3-83  
Microsoft Internet Explorer, 2-1  
Misc. Reading Type drop-down list, 3-73  
Mobile Client for Laptop setup program, 2-2  
Mobile Server, 2-2

## N

---

Name field (Calendar page, Create Personal Task view), 3-21  
Name field (Information page, Create Task view), 3-47  
Need by date field, 3-77  
New subtab, 3-82  
Note field, 3-50  
Note status drop-down list, 3-50  
Note type drop-down list, 3-49  
Notes window, 3-49

## O

---

operating systems  
    Windows 2000, 2-1  
    Windows 98, 2-1  
    Windows ME, 2-1  
    Windows NT 4.0 (Service Pack 5), 2-1  
    Windows XP, 2-1  
Oracle Service Online, 1-2  
Oracle9i Lite database, 2-2  
Order selection, 3-79, 3-80  
Outbox subtab, 3-83

## P

---

page shots  
    Calendar, 3-5  
    Home, 3-85  
    Information, 3-24  
    Information, Contract Line Details view, 3-37  
    Information, Create Service Request view, 3-35  
    Information, Create Task view, 3-46  
    Information, Customer Details view, 3-25, 3-41

Information, Installed Base Details view, 3-28  
Information, Material Reporting view, 3-55  
Information, Service Request Details view, 3-31, 3-39, 3-45  
Information, Task Details view, 3-43  
Information, Time Reporting view, 3-52  
Information, Transfer Parts, 3-78

Palm handheld device, 1-3  
Pentium III processor, 2-1  
person icon, 3-25, 3-32  
personal task, definition of, 3-21  
Planned Effort field, 3-44  
Planned End Date field, 3-44  
Planned Start Date field, 3-44  
Problem drop-down list, 3-33  
Product column (Calendar page), 3-7

## Q

---

Quick Find drop-down list, 3-86

## R

---

Reason drop-down list, 3-79  
Rejected task status, 3-8  
Request column (Calendar page), 3-7  
Reset Flag check box, 3-73  
Resolution drop-down list, 3-33

## S

---

Scheduled column (Calendar page), 3-7  
Scheduled End Date field, 3-44  
Scheduled Start Date field, 3-44  
Service Request Details view (Information page), 3-31, 3-42, 3-45  
Service Request header, 3-33  
Service Requests selection, 3-30, 3-31  
setup.exe, 2-2  
Severity drop-down list, 3-36  
Start Time field, 3-53  
Status column (Calendar page), 3-8  
Status drop-down list, 3-36, 3-47  
Status drop-down list (Calendar page, Create Personal Task view), 3-21

## subtabs

Inbox, 3-81

New, 3-82

Outbox, 3-83

Summary field, 3-36

Summary of Reported Materials header, 3-60

system administrator, 3-44

system tray, 3-3

## T

---

table of tasks for the day (Calendar page), 3-6  
tabs

Calendar, 3-5, 3-6, 3-9, 3-21

Home, 3-85

Information, 3-23, 3-30, 3-35, 3-36, 3-38, 3-40,  
3-42, 3-45, 3-51, 3-54, 3-61, 3-64, 3-67, 3-71,  
3-75, 3-78, 3-79

Messaging, 3-81, 3-82, 3-83

Task Assignment header, 3-44

Task Details view, 3-44

Task Details view (Information page), 3-42, 3-47

Task header, 3-43

Task Name column (Calendar page), 3-7

Task Number column (Calendar page), 3-7

Task selection, 3-42

task statuses

Accepted, 3-8

Assigned, 3-8

Cancelled, 3-8

Closed, 3-8

Completed, 3-8

order of progression, 3-8

Rejected, 3-8

Working, 3-8

task, definition of, 3-41

Tasks Summary table, 3-85

Time Reporting selection, 3-51

Transaction Type drop-down list (Information  
screen, Time Reporting), 3-55

Transaction Type drop-down list (Quick Debrief  
page), 3-17

Transfer Lines table, 3-79

Travel Time column (Calendar page), 3-7

Type drop-down list, 3-36, 3-47

Type drop-down list (Calendar page, Create  
Personal Task view), 3-21

## U

---

UOM drop-down list, 3-15, 3-63

Urgency drop-down list, 3-36

Use the following task as template drop-down  
list, 3-36, 3-46

## V

---

View drop-down list (Information page), 3-23,  
3-30, 3-31

View drop-down list selections

Customer, 3-23

Customer Product, 3-27

Inventory, 3-75

Order, 3-79, 3-80

Service Requests, 3-30, 3-31

Task, 3-42

## W

---

Web-to-Go icon, 3-3

Web-to-Go server, 2-2

window shots

calendar, 3-10

Notes, 3-49

Windows 2000, 2-1

Windows 98, 2-1

Windows Explorer, 2-2

Windows ME, 2-1

Windows NT 4.0 (Service Pack 5), 2-1

Windows XP, 2-1

Working status, 3-51

Working task status, 3-8