Oracle® Mobile Field Service

User Guide for Palm Handhelds

Release 11*i*

Part No. B10090-04

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

Part No. B10090-04

Primary Author: Mike Sanko

Contributing Authors: Millie Wang, Michelle Cheng

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

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

Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Mobile Field Service User Guide for Palm Handhelds*. This guide describes 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.

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

The *Oracle Mobile Field Service User Guide for Palm Handhelds* describes how to use Oracle Mobile Field Service / Palm. The guide is composed of the following chapters:

- Chapter 1, "Understanding Oracle Mobile Field Service / Palm" describes what Oracle Mobile Field Service / Palm 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 / Palm" describes what is needed to install and use the Oracle Mobile Field Service / Palm application. It also describes how to launch the application.
- Chapter 3, "Using Oracle Mobile Field Service / Palm" describes how to use Oracle Mobile Field Service / Palm to process service requests and tasks.
- Chapter 4, "General Operating Rules" describes some general operating rules of Oracle Mobile Field Service / Palm that may not be obvious.
- Appendix A, "Setting up Schedules and Responsibilities" describes the different levels of control the field service representative can exercise when doing his job.

Typographic Conventions

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

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

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/Palm 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/Palm.

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 This Product

Oracle Mobile Field Service User Guide for Field Service/Laptop

This guide explains how to use the Oracle 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.

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.

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.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Mobile Field Service/Palm 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/Palm 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 Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* 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 Oracle*MetaLink*, 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 Oracle*MetaLink*, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* 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.

1

Understanding Oracle Mobile Field Service/Palm

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

1.1 About Oracle Mobile Field Service/Palm

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

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

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

1.2 Overview of the Oracle Field Service Suite

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

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

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

1.3 The Oracle Field Service Process

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

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

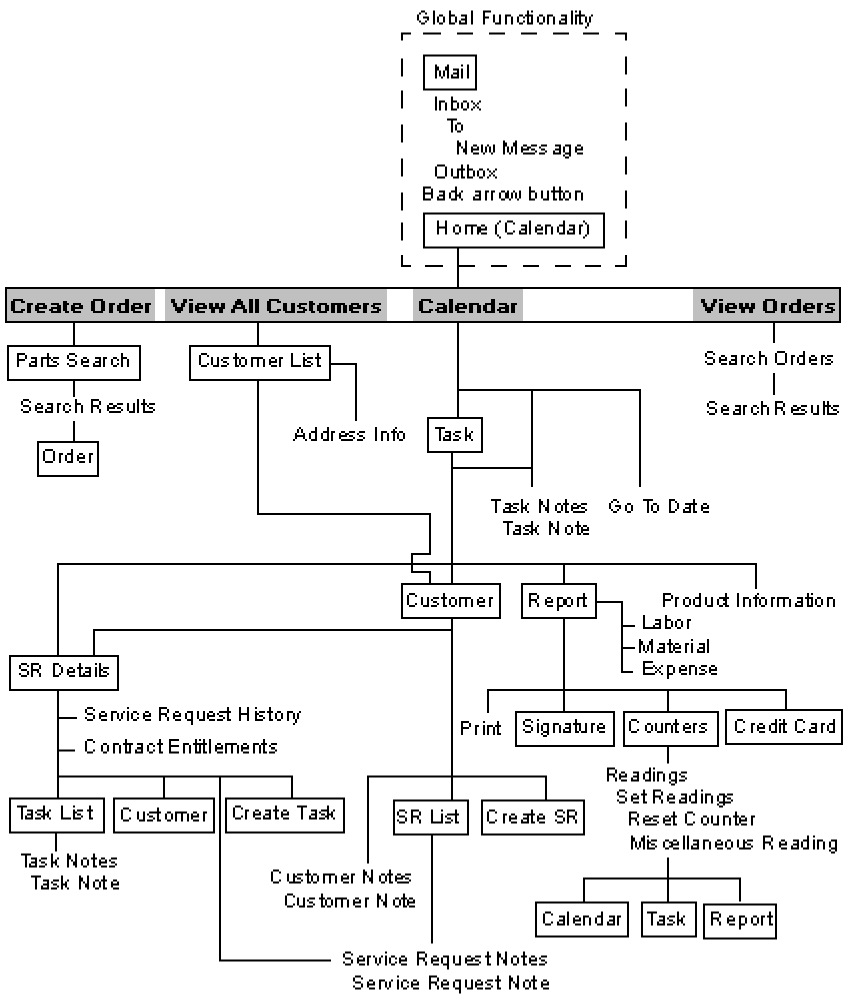
Steps	Description *(Cont.)*
2. Service request screening and qualification	After a service request is created, it is screened to avoid a field visit. The service request is analyzed by a support agent who searches the knowledge base for a solution. As an outcome of this process, the request may be closed,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

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

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

1.4 Navigation Path

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



In Oracle Mobile Field Service / Palm, there are screens and windows. A screen contains global icons and the time of day in the upper portion while a window contains none of these. See "Using Global Functionality" on page 3-5 for further details. In the diagram in this section, text within a rectangle represents a screen.

The Calendar screen is where you start in Oracle Mobile Field Service / Palm. The Calendar screen is the "Home screen." From this screen, you can access your calendar of tasks for the day. You have the ability to view the tasks for a different day. From the Calendar screen, you can open the Customer List screen and then access the task for a desired customer. Also from the Calendar screen, you can view and create part orders. Finally, you can access and create task notes and open the Tasks screen from the Calendar screen.

A task is described in the Task screen. From this screen, you can access and create task notes and you can also access customer product information, and the SR (Service Request) Details, Customer, and Report screens.

The SR Details screen is where you can access service request history and contract entitlements. Likewise, you can access and create service request notes. From the SR Details screen, you can also access the Task Lists, Customer, and Create Task screens.

From the Task List screen, you can view all the tasks for the current service request. You can also access and create task notes from this screen.

The Customer screen is where you can view the customer’s address and access and create service request notes. From this screen, you can also access the SR Details, Create SR, and SR List screens.

The SR List screen lists all the service requests assigned to you. From this screen, you can also access and create service request notes.

From the Report screen, you can view and report labor time, material, and expenses used to complete a task. From this screen, you can print a task summary report and access the Signature, Counter, and Credit Card screens.

From the Counter screen, you can set, reset, and change readings. You can also access the Calendar, Task, and Reports screens from here.

The Mail screen 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 screen.

2

Installing Oracle Mobile Field Service/Palm

The Oracle Mobile Field Service/Palm application is installed from a desktop PC. First, you download and install the application onto a PC. Then you synchronize the Palm handheld with the PC to transfer the software onto the Palm handheld.

This section describes the installation requirements for the Oracle Mobile Field Service/Palm application. It also describes how to launch the application on the Palm handheld.

2.1 Minimum Hardware Requirements

This section describes the minimal desktop PC and Palm handheld hardware necessary to run the Oracle Mobile Field Service/Palm application.

2.1.1 Desktop PC Hardware Requirements

The following are the minimal hardware necessary to download and install the application onto a desktop PC:

- Computer: IBM-compatible with Pentium I processor
- Disk space: 50 MB free space
- Monitor: 256 color display
- RAM: 32 MB of available memory
- Other requirements: serial port, Internet connection, mouse or pointer device

2.1.2 Palm Handheld Hardware Requirements

The following is the minimal hardware necessary to run the Oracle Mobile Field Service/Palm application on a Palm handheld:

- Device: Any Palm handheld running Palm OS 3.5 or higher
- RAM: 2 MB of available memory

2.2 Minimum Software Requirements

This section describes the minimal PC and Palm handheld software necessary to run the Oracle Mobile Field Service / Palm application.

2.2.1 Desktop PC Software Requirements

The following are the minimal software necessary to install the application from a PC:

- Operating system: Windows NT 4.0 (Service Pack 5), Windows 95, Windows 98, Windows 2000, Windows ME or Windows XP.
- Palm desktop: At least the HotSync Manager and Install Tool.
- Browser: Microsoft Internet Explorer, version 5.5 or later. This is the recommended browser.

2.2.2 Palm Handheld Software Requirements

The following is the minimal software necessary to run the application:

- Operating System: Palm OS 3.5 or higher

2.3 Minimum Palm Handheld Communication Requirements

The Palm handheld can synchronize over any network that supports HTTP. This includes the following type of communications:

- Wired modem
- Wireless modem
- RAS connection
- HotSync operation

2.4 Installing the Application on Your Palm Handheld Device

The following table provides high-level steps that describe the installation of Oracle Mobile Field Service/Palm. Some of the steps are performed on a desktop PC while others are performed on the Palm handheld.

Step	Performed at
1. Download and Installing Oracle Lite Setup	PC: The PC to which the Palm handheld HotSyncs
2. Perform a HotSync to put the application and Oracle Lite components on the Palm handheld	Palm handheld
3. Configure the Oracle Conduit on the Palm desktop	PC: The PC to which the Palm handheld HotSyncs
4. Configure the Oracle Lite mSync on the Palm handheld	Palm handheld
5. Perform a full synchronization to retrieve the Oracle Mobile Field Service/Palm application and data	Palm handheld
6. Open the Oracle Mobile Field Service/Palm application	Palm handheld

2.4.1 Step 1: Downloading and Installing Oracle Lite Setup

Complete this procedure from a PC to install the Oracle Mobile Field Service/Palm application.

Steps

1. Open your browser.
2. Enter the following URL in your browser, where `<mobile server>` is the domain name or IP address of the mobile server:

   `http://<mobile server>/setup`

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

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

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

4. To run the setup program, use Windows Explorer and double click on the `setup.exe` file that you downloaded.

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

5. Choose a directory, for example, `C:\ora_HOME`, and then click **OK**.

   The Setup program downloads all the required components.

   After you download the necessary files, the setup program prompts you to select a Palm user.

Notes:

- If the Palm desktop is not installed, the setup program will prompt you to install it. Also, you will need to manually publish all `*.PRC` files if they have not been published.
- When you have installed the Palm desktop, the setup program informs you that the components are successfully installed and will be uploaded with the next HotSync.

2.4.2 Step 2: Performing a HotSync to Put the Application and Oracle Lite Components on the Palm Handheld

Complete this procedure using the Palm handheld and the PC loaded with Mobile Client for Palm.

Steps

1. Perform a HotSync on the Palm handheld to upload the Oracle Lite components from the PC to the Palm handheld device.

2. Perform a HotSync again to receive the Field Service Application and the database.

   The PC that hosts the HotSync manager must have an HTTP connection with the Mobile Server.

2.4.3 Step 3: Establishing an Oracle Conduit on the Palm HotSync Manager

Complete this procedure to establish an Oracle Conduit on the Palm HotSync Manager.

Steps

1. Copy the following files from the `C:/ORANT/palm` to the HotSync directory:
   - `conshttp_reg.exe`
   - `conshttp.dll`
2. Start the HotSync manager.
3. Run `conshttp_reg.exe`.
4. Close and restart the HotSync manager.

2.4.4 Step 4: Configuring mSync on the Palm Handheld Device

To install the Oracle Mobile Field Service/Palm application and database on the Palm handheld device, you must perform an mSync. See "Synchronizing with the Enterprise System" on page 3-75 for a complete description of this procedure.

2.4.5 Step 5: Performing a Full Synchronization to Retrieve the Oracle Mobile Field Service/Palm Application and Data

Complete this procedure to do a full synchronization.

Steps

- Perform a HotSync.

  After the HotSync, the mobile database and the Oracle Mobile Field Service/Palm application are replicated to the client. You can also use Remote Access Services (RAS) or a modem to connect to the mobile server. You need not use the HotSync option all the time.

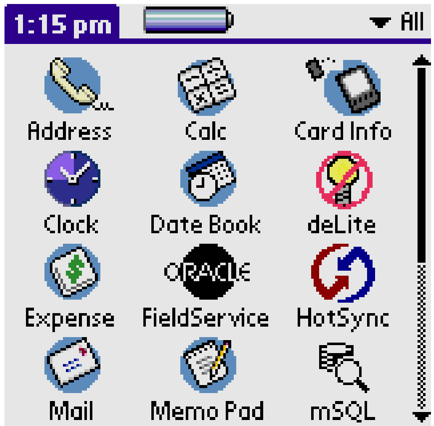
2.4.6 Step 6: Launching the Oracle Mobile Field Service/Palm Application

Complete this procedure to launch Oracle Mobile Field Service/Palm.

Steps

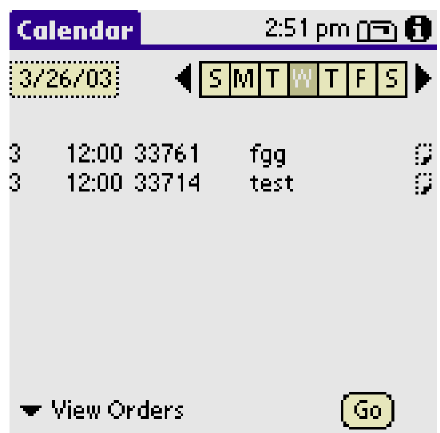
1. Tap the Applications icon in the lower screen of the Palm handheld to display the application picker.

   The Palm desktop opens.



2. From the Palm desktop, tap the FieldService icon.

   The application splash screen appears momentarily and then the Calendar screen opens.



3

Using Oracle Mobile Field Service/Palm

This chapter describes how to use Oracle Mobile Field Service / Palm to process service requests and tasks.This application enables you to do the following:

- View your task list for the day
- Work easily with tasks and service requests
- Create notes for tasks and service requests
- View customer information
- Create reports summarizing labor, material, and expense
- Set counter readings
- Obtain an electronic signature
- Record credit card information
- Communicate with others within your organizations through electronic messaging
- View customer product information

3.1 Application Overview

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

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

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

1. Launch Oracle Mobile Field Service / Palm

   See "Launching Oracle Mobile Field Service / Palm" on page 3-4.

2. Synchronize Oracle Mobile Field Service / Palm with the enterprise system

   See "Synchronizing with the Enterprise System" on page 3-75.

3. Review your calendar for the day.

   See "Working with Your Calendar" on page 3-6.

4. Open the task and view or change task information.

   See "Viewing and Changing Task Information" on page 3-10.

5. Set the status of the task on which you will be working.

   See "Viewing and Changing Task Information" on page 3-10.

6. Learn the customer address.

   See "Viewing Customer Information" on page 3-65.

7. Review service request information.

   See "Working with Service Requests" on page 3-15

   - Review contract information.

     See "Viewing Contract Information" on page 3-18.

   - Review service history information.

     See "Viewing Service Request History" on page 3-21.

   - Create or update a customer note if necessary.

See "Creating and Viewing a Customer Note" on page 3-30.

8. Set any counter and counter properties.

   See Setting Counter Readings on page 3-54.

9. Report task details.

   See "Reporting" on page 3-35.

10. Order any necessary parts needed to finish the task.

    See Spare Parts Management on page 3-60.

11. Repeat these steps for each task that time allows.

12. Finally, exit out of Oracle Mobile Field Service / Palm.

    See "Closing the Application" on page 3-77.

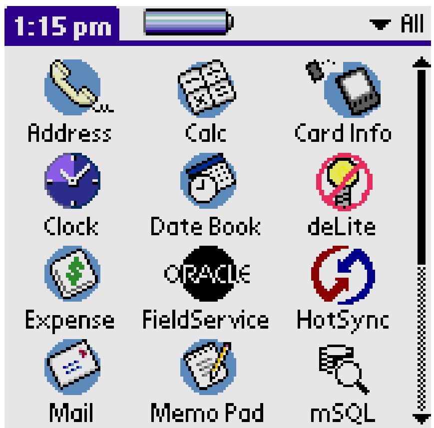
3.2 Launching Oracle Mobile Field Service/Palm

Complete this procedure to launch Oracle Mobile Field Service / Palm.

Steps

1. Tap the Applications icon in the lower screen of the Palm handheld to display the application picker.

   The Palm desktop opens.

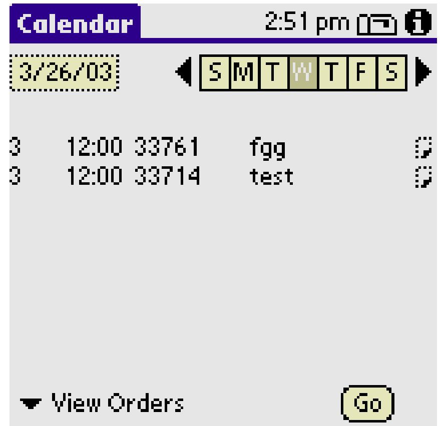
   

2. Tap the mSync icon on the Palm desktop to synchronizeOracle Mobile Field Service / Palm with the enterprise system.

   See "Synchronizing with the Enterprise System" on page 3-75 for a complete description of this procedure.

3. From the Palm desktop, tap the FieldService icon.

   The application splash screen appears momentarily and then the Calendar screen opens.



3.3 Using Global Functionality

Oracle Mobile Field Service / Palm provides global functions in all its screens. From the top of each screen, you can access this functionality through global icons.

Note: In Oracle Mobile Field Service / Palm, there are screens and windows. A screen contains global buttons and the time of day in the upper portion while a window contains none of these.

The following graphic shows the global functionality found in screens.

The global icons perform the following functions:

 Use the left arrow icon to return to the previous screen

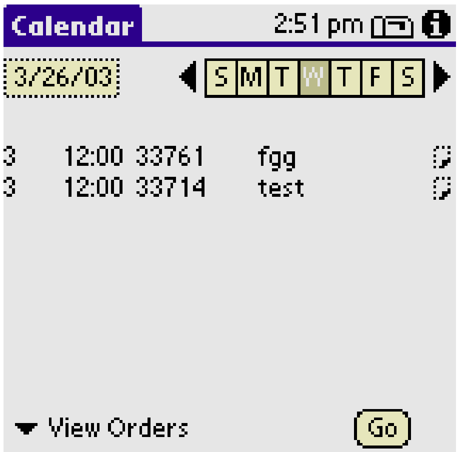
 Use the home icon to go to the Home screen

 Use the mail icon to go to the Mail screen (see "Messaging" on page 3-72)

To use a global function, tap on the appropriate global icon.

3.4 Working with Your Calendar

The Calendar screen is the starting point in the Oracle Mobile Field Service / Palm application. The Calendar screen lists non-closed tasks in descending order based on the scheduled date and time stamp. See "Viewing a Past or Future Calendar" on page 3-7 to view the tasks for a different day.



3.4.1 Understanding the Calendar Screen

The Calendar screen provides the following:

- A view of the tasks for the day
- Access to view or create part orders
- Access to task information for a selected task
- Access to a list of customers for which you are assigned tasks
- Access to past or future tasks

In the following table format, the Calendar screen briefly describes the tasks for the day:

- Column 1: Task severity
- Column 2: Task status
- Column 3: Task start time
- Column 4: Task number

- Column 5: Task name
- Column 6: Task note icon

The following table lists the possible task statuses that can be used in Oracle Mobile Field Service / Palm:

Task Status Symbol	Definition
check mark	Closed or completed task
x	Cancelled or rejected task
!	On hold task
->	Task is in the working process
nothing	Accepted, approved, assigned, or any other status

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

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

See "Viewing and Changing Task Information" on page 3-10 to learn how to change the status of a task.

The Calendar screen is updated each time you synchronize with the enterprise system. See "Synchronizing with the Enterprise System" on page 3-75 for a complete description of this procedure.

3.4.2 Viewing a Past or Future Calendar

This section describes how to change to a past or future calendar. There are two ways to change the calendar:

- Using the Go to Date window
- Using the calendar bar

3.4.2.1 Using the Go to Date Window

Steps

Complete the following steps from the Calendar screen to go directly to a desired date:

1. Tap the date field.

   The Go to Date window opens.

2. To change the year, tap the left and right arrows by the year.
3. To change the month, tap the desired month.
4. To change the day, tap the desired day in the calendar.

   Oracle Mobile Field Service / Palm returns you to the Calendar screen. Tap **Cancel** to return to the Calendar screen without selecting a day. Tap **Today** to select the current day and return to the Calendar screen.

3.4.2.2 Using the Calendar Bar

Steps

Complete the following steps from the Calendar screen to advance to the desired date:

1. To change the day for the active week, tap on the desired day of the week in the calendar bar.

   The tasks for the specified day appear in the Calendar screen.

2. To change the week, tap either the left or right arrow near the calendar bar.

   Depending on the arrow you tap, the application retrieves the schedule for the day seven days before or after the date your are currently displaying on the Calendar screen.

3.5 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 Changing Task Information" on page 3-10 for a complete description of this procedure.

In Oracle Mobile Field Service / Palm, you can view and change existing task information. The application also enables you to create a new task.

3.5.1 Viewing and Changing Task Information

The Task screen is where you access the following information:

- Tasks
- Service requests
- Customers
- Task notes
- Debriefs and counters
- Customer Products

Prerequisites

- Opening a task from the Calendar screen or Task List screen. See "Working with Your Calendar" on page 3-6 or "Viewing the Service Request Task List" on page 3-20, respectively.

Steps

Complete the following steps to view and change task information:

1. Navigate to the Calendar screen and then tap the desired task.

   The Task screen opens and displays task information along with product and problem information.

The following table describes the read-only fields of the Task screen:

Read-only Fields	Description
Task Num	The generated number for a task
Task	The name of the task
Priority	The priority in which the task is to be completed
Type	The type of task
Summary	Description of the service request
Product	The product that needs service
Customer	The name of the customer

2. To view or add a task note, tap on the note icon to the right of the Task Num field.

   See "Creating and Viewing a Task Note" on page 3-28 for a complete description of this procedure.

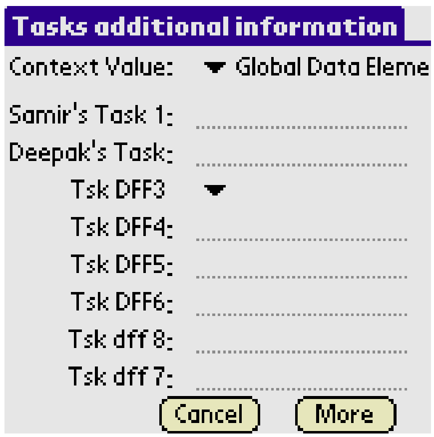
3. To change the task status, open the Status drop-down list and make one of the following selections:

   - Accepted—specify when you are ready to begin work on the task
   - Cancelled—specify when if the assigned task is not necessary
   - Closed—specify when the work for the task is finished

- Completed—specify when the work for the task is finished
- Rejected—specify if the assigned task is not applicable to the current situation
- Working—specify when a task is in progress

4. To view any additional task information, tap on the flexfields icon next to the Status drop-down list.

   The Task Additional Information screen opens.



This graphic is a typical view of the Task Additional Information screen. In this example, Context Value drop-down list, Samir's Task 1, Deepak's Task, Tsk DFF3 drop-down list, Tsk DFF4, Tsk DFF5, Tsk DFF6, Tsk DFF7, and Tsk DFF8 are the task flexfields.

Note: Task flexfields are determined at the home office and cannot be changed or created in the field.

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5. Tap **OK** to save your work and return to the Task screen.

   Tap **Cancel** to return to the Task screen without saving your work.

6. In the Task screen, tap on the icon next to the Product field to view additional install base information.

   See "Viewing Customer Product Information" on page 3-70 for a complete description of this procedure.

7. To view customer address information, tap on the envelope icon to the right of the Customer field.

   See "Viewing Customer Information" on page 3-65 for a complete description of this procedure.

   If a task is escalated on the enterprise system, then the Escalated check box will be selected.

8. From the drop-down list at the bottom of the screen, make a selection and then tap **Go**.

   - For the **View Debrief** selection, the Report screen opens. In this screen, you can enter information for the labor, material, and expense reports. See "Reporting" on page 3-35 for additional details.

   - For the **View Notes** selection, the Task Note window opens. In this window, you can specify a note for a task. See "Creating and Viewing a Task Note" on page 3-28 for additional details.

   - For the **View Service Request** selection, the SR Details screen opens. In this screen, you can view and change service request details, including the problem and resolution. See "Viewing and Changing Service Request Information" on page 3-15 for additional details.

   - For the **View Customer** selection, the Customer screen opens. In this screen, you can view the customer's address and other related information. See "Viewing Customer Information" on page 3-65 for additional details.

3.5.2 Creating a Task

Steps

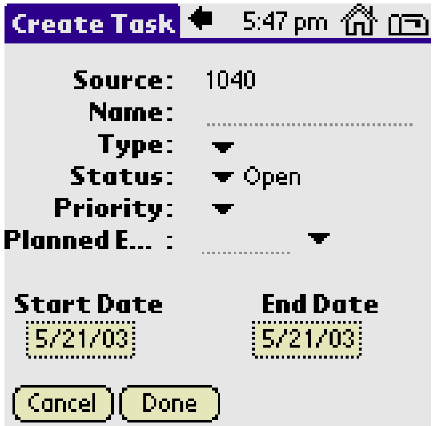
Complete the following steps to create a task:

1. Navigate to the SR Details screen.

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

2. From the drop-down list at the bottom of the screen, select **Create Task** and then tap **Go**.

   The Create Task screen opens. A generated source number is in the Source field.



3. In the Name field, enter the name of the task.
4. From the Type drop-down list, select the task type.
5. From the Status drop-down list, select task status.

   The default selection is `Open`.

> **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.

6. From the Priority drop-down list, select the task priority.
7. In the Planned Effort field, enter the planned finish time for the task.

   Next to this field is a drop-down list where you select the type of time units.
8. To change the task start date, tap in the Start Date field and make the appropriate change.

   See "Using the Go to Date Window" on page 3-8 for a complete description of this procedure.
9. To change the task end date, tap in the End Date field and make the appropriate change.

   See "Using the Go to Date Window" on page 3-8 for a complete description of this procedure.

10. Tap **Done** to save the task and return to the SR Details screen.

    Tap **Cancel** to return to the SR Details screen without saving the task. See "Viewing and Changing Service Request Information" on page 3-15 for a complete description of the SR Details screen.

3.6 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 screen. See "Understanding the Calendar Screen" on page 3-6 for a complete description of this procedure.

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

In Oracle Mobile Field Service / Palm, you can view and change service requests. The application also enables you to view all the tasks for a service request.

3.6.1 Viewing and Changing Service Request Information

Prerequisites

- Opening a task from the Calendar screen. See "Working with Your Calendar" on page 3-6.

Steps

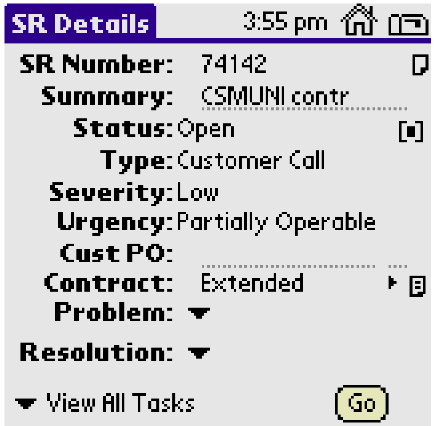
Complete the following steps to view or change service request information:

1. Navigate to the Calendar screen and tap on the desired task.

   The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

2. From the drop-down list at the bottom of the screen, select **View Service Request** and then tap **Go**.

   The SR Details screen opens.



The following table describes the read-only fields of the SR Details screen:

Read-only Fields	Description
SR Number	The service request number
Summary	Description of the service request
Status	The current state of the service request
Type	The type of service request
Severity	The level of importance of the service request
Urgency	The urgency in which the service request is to be completed

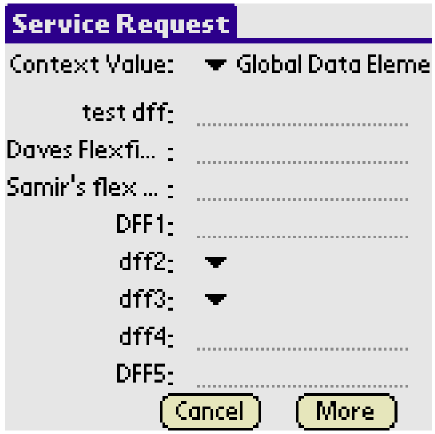
3. To view or add a service request note, tap on the note icon to the right of the SR Num field.

   See "Creating and Viewing a Service Request Note" on page 3-26 for a complete description of this procedure.

4. To view any additional summary text, tap on the arrow to the right of the Summary field.

5. To view or change any additional service request information, tap on the flexfields icon next to the Status drop-down list.

   The Service Request screen opens.



This graphic is a typical view of the Service Request screen. In this example, Context Value drop-down list, test dff, Daves Flexfield, Samir’s flex, DFF1, DFF2 drop-down list, DFF3 drop-down list, DFF4, and DFF5 are the service request flexfields.

Note: Service request flexfields are determined at the home office and cannot be changed or created in the field.

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6. Tap **OK** to save your work and return to the SR Details screen.

   Tap **Cancel** to return to the SR Details screen without saving your work.
7. In the SR Details screen, enter new information in the Cust PO field to add or change customer purchase order information.
8. To change the service request problem type, open the Problem drop-down list and make the appropriate selection.
9. To change the service request problem resolution, open the Resolution drop-down list and make the appropriate selection.
10. From the drop-down list at the bottom of the screen, make a selection and then tap **Go**.

    - For the **View All Tasks** selection, the Task List screen opens. In this screen, you can view all the tasks for the service request. See "Viewing the Service Request Task List" on page 3-20 for complete details.

- For the **View Customer** selection, the Customer screen opens. In this screen, you can view customer address information and other related customer information. See "Viewing Customer Information" on page 3-65 for complete details.
- For the **View Notes** selection, the Service Request Notes window opens. In this window, you can view and add service request notes. See "Creating and Viewing a Service Request Note" on page 3-26 for complete details.
- For the **Create Task** selection, the Create Task screen opens. As the screen name implies, this is where you can create a task. See "Creating a Task" on page 3-13 for complete details.
- For the **View SR History** selection, the SR History window opens. As the screen name implies, this is where you view the service request history. See "Viewing Service Request History" on page 3-21 for complete details.

3.6.2 Viewing Contract Information

Before performing a job, 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
- Service coverage

Steps

Complete the following steps to view contract information:

1. Navigate to the SR Details screen.

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

2. To view any contract information, tap on the icon next to the Contract field.

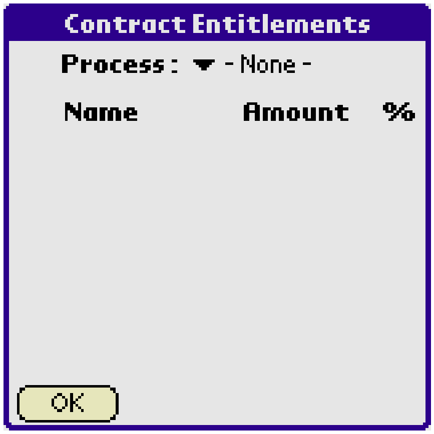
   The Contract Entitlements window opens.

The following table describes the read-only fields of the Contract Entitlements window:

Read-only Fields	Description
Contract Number	The number of the contract.
Contract Status	The status of the contract
Description	The name of the contract

3. Tap **Details** to view additional contract information.

   Oracle Mobile Field Service / Palm displays another view of the Contract Entitlements window, which contains additional contract information. To return to the SR Details screen without viewing additional contract information, tap **OK**.



4. Tap **OK** to return to the first view of the Contract Entitlements window.
5. Tap **OK** to return to the SR Details screen.

3.6.3 Viewing the Service Request Task List

Steps

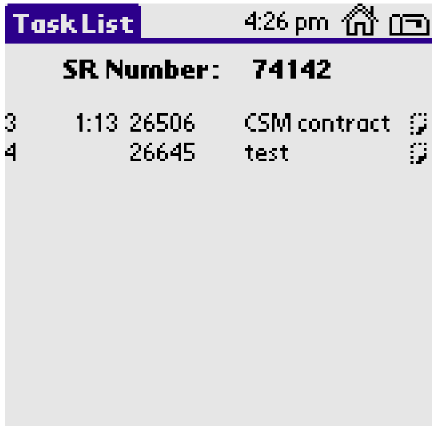
Complete the following steps to view the service request task list:

1. Navigate to the SR Details screen.

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

2. From the drop-down list at the bottom of the screen, select **View All Tasks** and then tap **Go**.

   The Task List screen opens.



This screen contains the service request number and lists each task for the service request.

3. To view the task description, tap on the desired task.

   The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

4. To view or create a task note, tap on the note icon for the task.

   The Task Note window opens. See "Creating and Viewing a Task Note" on page 3-28 for a complete description of this procedure.

5. Tap the global arrow button at the top of the Task List screen to return to the SR Details screen. See "Using Global Functionality" on page 3-5 for complete details.

3.6.4 Viewing Service Request History

To best service the customer, the field service representative should review the customer's service history prior to making a customer visit. Oracle Mobile Field Service/Palm can provide you with 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.

Steps

Complete the following steps to view service request history:

1. Navigate to the SR Details screen.

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

2. From the drop-down list at the bottom of the screen, select **View SR History** and then tap **Go**.

   The SR History window opens. This screen displays the in-date or service request call-date, service request number, and product name.

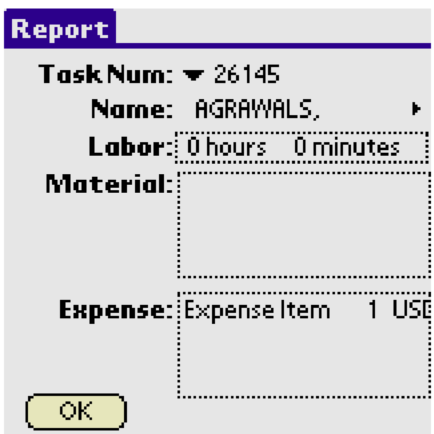
   

3. Tap on the service request.

   The SR Details screen opens, displaying read-only information about the selected service request. See "Viewing and Changing Service Request Information" on page 3-15 for a complete description of this screen.

4. Tap **Report**.

   The Report screen opens. The task number is found in the Task Num drop-down list and the user name is found in the Name field. For additional details about this screen and how to view reports, see "Reporting" on page 3-35.



5. In the Report screen, tap **OK**.

   Oracle Mobile Field Service / Palm returns you to the SR Details screen.

3.6.5 Creating a Service Request

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)

Steps

Complete the following steps to create a service request:

1. Navigate to the Customer screen.

   See "Viewing Customer Information" on page 3-65 for a complete description of this procedure.

2. From the drop-down list at the bottom of the screen, select **Create Service Request** and then tap **Go**.

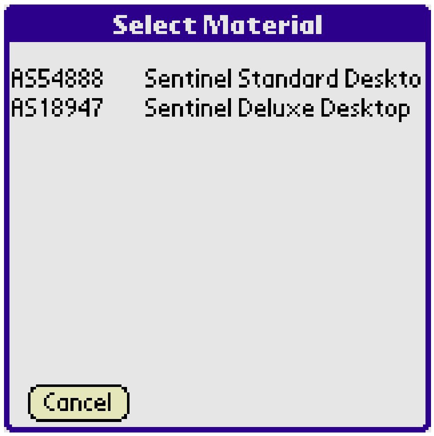
   The Create SR screen opens. The customer name appears below the screen name.

3. From the Type drop-down list, select the service request type.
4. From the Status drop-down list, select service request status.
5. In the Summary field, briefly describe the service request.
6. In the Cust PO field, enter the customer purchase order.
7. From the Problem drop-down list, select the service request problem.
8. To specify an inventory item or install base product, select either the Inventory check box or the IB Product check box, respectively, and then tap **Find**.

For either check box selection, the Select Material window opens.

Note: It is not required to specify an inventory item or install base product when creating a service request.



9. Tap the appropriate material item.

   In the Create SR screen, the selected material item appears in the Product field and the material item serial number appears in the Serial Num field.

   Tap **Cancel** to return to the Create SR screen without selecting a material item.

10. Tap **Done** to save your work and return to the Customer screen.

    Tap **Cancel** to return to the Customer screen without saving your work.

3.7 Using Notes

You can create and view notes for the following:

- Service request
- Task
- Customer
- Customer product

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

3.7.1 Creating and Viewing a Service Request Note

Steps

Complete the following steps to view or add a service request note:

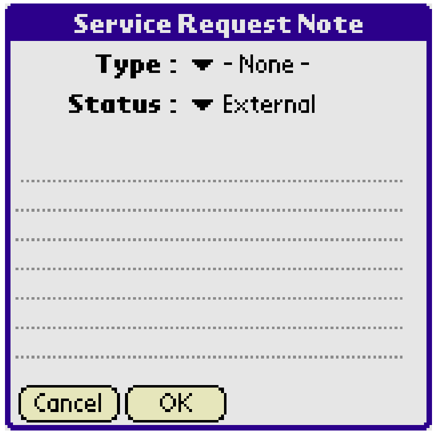
1. Navigate to the SR Details screen.

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

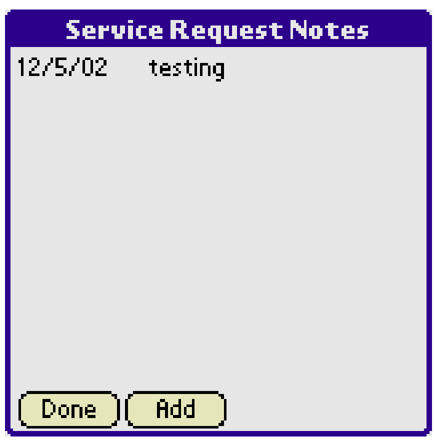
2. In the SR Details screen near the SR Number field, tap on the note icon to view or add a service request note.

   The Service Request Note window opens if there are no existing service request notes.

> **Note:** If the note icon is not solid, this indicates that there are no existing service request notes. If the note icon is solid, then there are existing service request notes.



The Service Request Notes window opens if there are existing service request notes.



- Tap **Add** to open the Service Request Note window and create a service request note. See step 3 for further details.
- Tap on the service request note to open the Service Request Note window and view the note.
- Tap **Done** to return to the Customer screen.

3. From the Service Request Note window, select the note type from the Type drop-down list.
4. From the Status drop-down list, select the note status.

5. Enter the note text in the Note field.
6. Tap **OK**.

   Oracle Mobile Field Service / Palm opens the Service Request Notes window. The new service request note is now listed in this window along with the creation date.
7. Tap **Done** to return to the Customer screen.

3.7.2 Creating and Viewing a Task Note

Steps

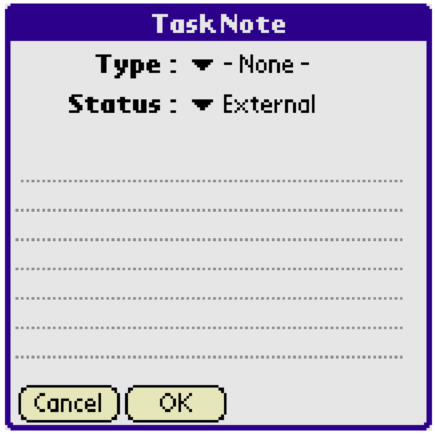
Complete the following steps to view or add a task note:

1. Navigate to the Task screen.

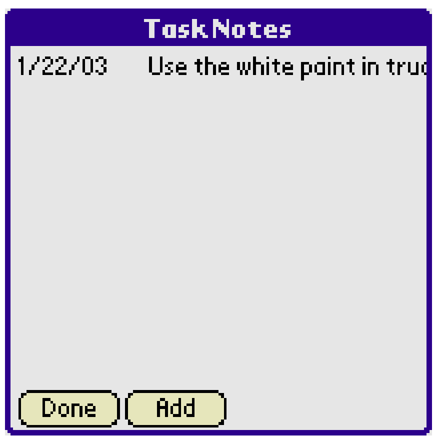
   See "Viewing and Changing Task Information" on page 3-10 for a complete description of this procedure.
2. In the Task screen near the Task Num field, tap the note icon to view or add a task note.

   The Task Note window opens if there are no existing task notes.

   Note: If the note icon is not solid, this indicates that there are no existing task notes. If the note icon is solid, then there are existing task notes.



The Task Notes window opens if there are existing task notes.



- Tap **Add** to open the Task Note window and create a task note. See step 3 for further details.
- Tap on the task note to open the Task Note window and view the note.
- Tap **Done** to return to the Task screen.

3. From the Task Note window, open the Type drop-down list and then select the note type.
4. From the Status drop-down list, select the note status.
5. Enter the note text in the Note field.

6. Tap **OK**.

   Oracle Mobile Field Service / Palm opens the Task Notes window. The new task note is now listed in this window, along with the creation date.

7. Tap **Done** to return to the Task screen.

3.7.3 Creating and Viewing a Customer Note

Steps

Complete the following steps to view or add a customer note:

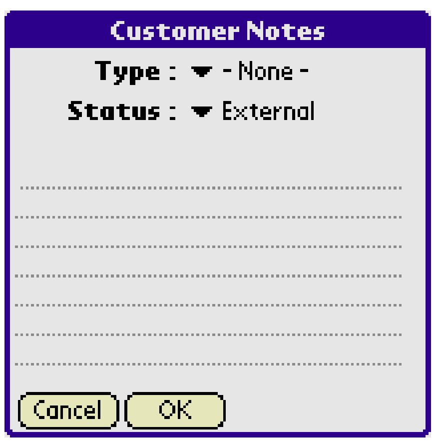
1. Navigate to the Customer screen.

   See "Viewing Customer Product Information" on page 3-70 for a complete description of this procedure.

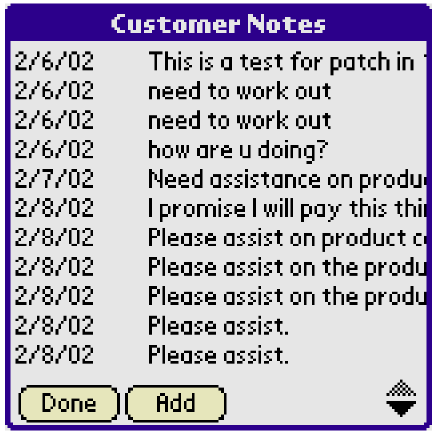
2. In the Customer screen near the Cust num field, tap on the note icon to view or add a customer note.

   The Task Note window opens if there are no existing customer notes.

Note: If the note icon is not solid, this indicates that there are no existing customer notes. If the note icon is solid, then there are existing customer notes.



The Customer Notes window opens if there are existing task notes.



- Tap **Add** to open the Customer Note window and create a customer note. See step 3 for further details.
- Tap on the task note to open the Customer Note window and view the note.
- Tap **Done** to return to the Customer screen.

3. From the Customer Note window, open the Type drop-down list and then select the note type.

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

4. From the Status drop-down list, select the note status.
5. Enter the note text in the Note field.
6. Tap **OK**.

   Oracle Mobile Field Service / Palm opens the Customer Notes window. The new customer note is now listed in this window, along with the creation date.
7. Tap **Done** to return to the Customer screen.

3.7.4 Creating and Viewing a Customer Product Note

Steps

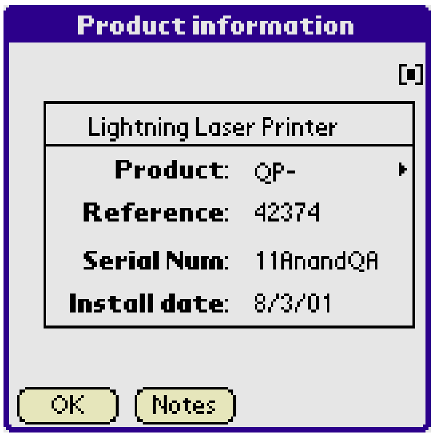
Complete the following steps to view or add a customer product note:

1. Navigate to the Task screen.

   See "Viewing and Changing Task Information" on page 3-10 for a complete description of this procedure.

2. Tap on the customer product icon near the Product field.

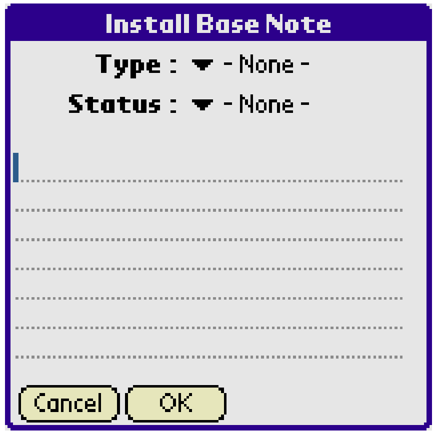
   The Product Information window opens. This window contains the customer product name, product number, reference, serial number, and install date.

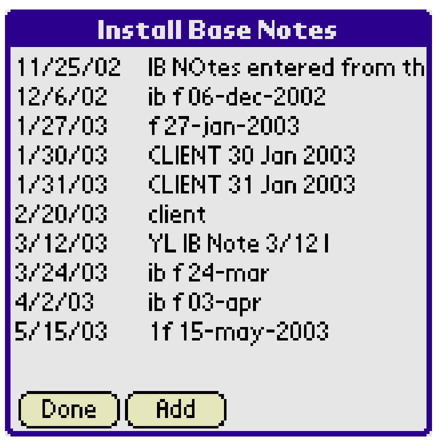
   If the product name is too large to fit in the Product field, an arrow appears to the right of the Product field. Tap on this arrow to view any additional product name.

3. Tap **Notes**.

   The Install Base Note window opens if there are no existing customer product notes.



The Install Base Notes window opens if there are existing customer product notes. The notes are listed in ascending order by creation date. For each note, the Install Base Notes window displays a portion of the note text.



- Tap **Add** to open the Install Base Note window and create a customer product note. See step 4 for further details.
- Tap on the customer product note to open the Install Base Note window and view the note.
- Tap **Done** to return to the Product Information window.

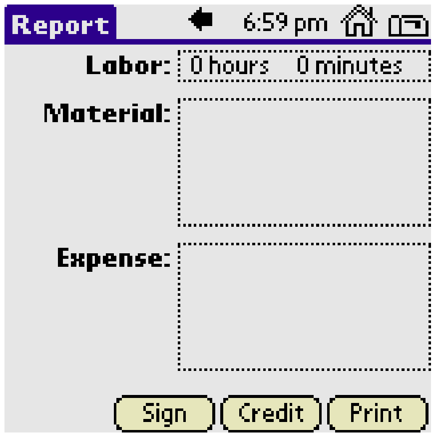
4. From the Install Base Note window, open the Type drop-down list and then select the note type.

5. From the Status drop-down list, select the note status.
6. Enter the note text in the Note field.
7. Tap **OK**.

   Oracle Mobile Field Service / Palm opens the Install Base Notes window. The new customer product note is now listed in this window, along with the creation date.
8. Tap **Done** to return to the Product Information window.

3.8 Reporting

The Report screen is where you do debrief reporting. Debrief reporting involves creating and viewing different report types.



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

- Labor — Describes how much labor 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.

3.8.1 Creating a Labor Report Item

You create labor report items to describe how much labor time was involved in the completion of a task. Oracle Mobile Field Service / Palm enables you to add labor report items regardless of the task status.

Prerequisites

- Opening a task from the Calendar screen. See "Working with Your Calendar" on page 3-6.
- Selecting View Debrief in the Task screen. See "Viewing and Changing Task Information" on page 3-10.

Steps

Complete the following steps to create a labor report:

1. Navigate to the Calendar screen and tap the desired task.

   The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

2. Select **View Debrief** from the drop-down list at the bottom of the screen.

   The Report screen opens. See "Reporting" on page 3-35 for a description of this screen.

3. Tap in the Labor field.

   The Select Labor window opens. This window lists the possible labor types.

4. Tap the desired labor type.

   The Set Labor window opens with the selected labor type at the top of the window and a default business process in the Process drop-down list. In this example, the default business process is Field Service.

5. If you are not satisfied with the default business process, then make the appropriate selection from the Process drop-down list.

6. From the Activity drop-down list, select the appropriate service activity.

7. If the date is incorrect, tap in the date field and then change the date. See "Using the Go to Date Window" on page 3-8 for complete details.

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. In the Duration field, specify the amount of labor time that was needed to complete the task.

9. From the drop-down list next to the Duration field, select the unit of time that describes the value in the Duration field.

10. Tap in the Start field and then select the start time from the hour and minutes lists to the right of the field.

    The hour values are 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.

11. Tap in the End field and then select the start time from the hour and minutes lists to the right of the field.

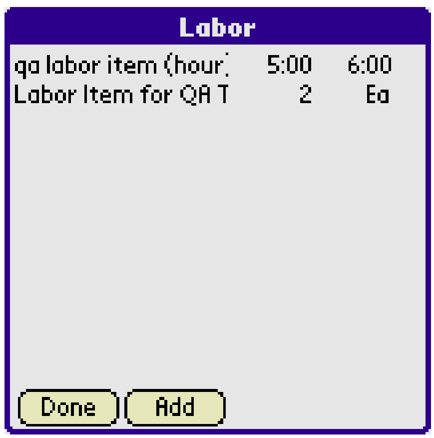
    Again, the hour values are for the 24-hour clock format.

Note: If you specify an end-time that precedes the start-time, an asterisk (*) appears next to the End field to indicate that the task will continue into the next day. The date is also incriminated by one day.

---

12. Tap **OK**.

The Labor window opens. The labor item along with the start and finish times are listed here.



13. Tap **Done** to add the labor item to the labor report and return to the Report screen.

Tap **Add** to add the labor item to the labor report and return to the Select Labor window to add another labor item.

3.8.2 Deleting a Labor Report Item

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

Prerequisite

- Creating a labor report item. See "Creating a Labor Report Item" on page 3-35.

Steps

Complete the following steps to delete a labor report item:

1. For a desired task, navigate to the Report screen.

   See "Creating a Labor Report Item" on page 3-35 for a complete description of this procedure.

2. Tap in the Labor field.

   The Labor window opens.

3. Select the labor report item that you want to delete.

   The Set Labor window opens containing the **Delete** button. If Oracle Mobile Field Service/Palm was synchronized after the creation of the desired labor report item, the **Delete** button will not be present in the Set Labor window.

4. Tap **Delete**.

5. Oracle Mobile Field Service/Palm returns you to the Labor window where the desired labor report item is no longer present.

3.8.3 Creating 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 customers install base, and possibly invoice the customer for the materials used.

Initially, one item is associated with a service request. This can be an item from a customer's install base or an item from an inventory. One or more tasks are created for this service request and you can create a material report for each task. If multiple field service representatives are assigned to a task, then you can create multiple material reports for a task. You can also add several material report items to a material report. For each material report item, a separate line is created in the report. Oracle Mobile Field Service/Palm enables you to add material report items regardless of the task status.

Prerequisites

- Opening a task from the Calendar screen. See "Working with Your Calendar" on page 3-6.
- Selecting View Debrief in the Task screen. See "Viewing and Changing Task Information" on page 3-10.

Steps

Complete the following steps to create a material report:

1. Navigate to the Calendar screen and tap the desired task.

   The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

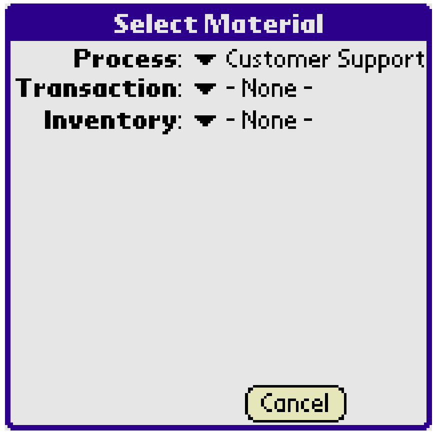
2. Select **View Debrief** from the drop-down list at the bottom of the screen.

   The Report screen opens. See "Reporting" on page 3-35 for a description of this screen.

3. Tap in the Material field.

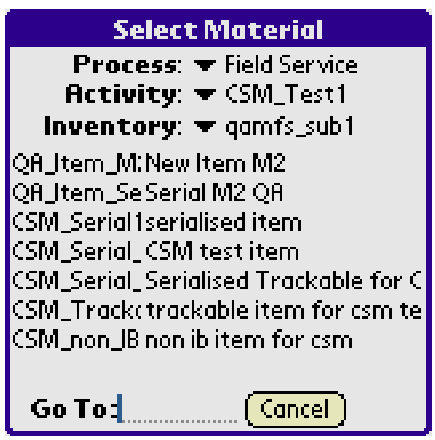
   The Select Material window opens with a default business process in the Process drop-down list. In this example, Customer Support is the default business process.

   If there are existing material report items, then the Material window opens. In this case, tap **Add** to open the Select Material window.



4. If you are not satisfied with the default business process, then make the appropriate selection from the Process drop-down list.
5. From the Transaction drop-down list, make the appropriate selection.

   The inventory appears in the Inventory drop-down list and the material items appear below this drop-down list.



6. If you are not satisfied with the default inventory type, then make the appropriate selection from the Inventory drop-down list.

   The material items for the selected inventory appear below the Inventory drop-down list.
7. Select the appropriate material item.

The Set Material window opens with the material name appearing near the top of the window. The default value of 1 appears in the Quantity field. In this example, `Each` is the default selection for the UOM drop-down list.

8. If 1 is not the correct amount of material needed to complete the task, then specify the correct value in the Quantity field.
9. If the default for the UOM drop-down list is not correct, then select the correct unit of measure from this drop-down list.
10. If the default for the Revision drop-down list is not correct, then make the correct selection from this drop-down list.
11. To add another material item to the material report, tap **More**.

    The Select Material window opens again.
12. Select the appropriate material item.

    The Set Material window opens with the material name appearing near the top of the window. Enter information in this window as described earlier in this procedure.
13. Tap **OK**.

    The Material window opens with the new material items listed.

14. Tap **Done** to add the material item to the material report and return to the Report screen.

    Tap **Add** to add the material item to the material report and return to the Select Material window to add another material item.

3.8.4 Deleting a Material Report Item

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

Prerequisite

- Creating a material report item. See "Creating a Material Report Item" on page 3-39.

Steps

Complete the following steps to delete a material report item:

1. For a desired task, navigate to the Report screen.

   See "Creating a Material Report Item" on page 3-39 for a complete description of of this procedure.

2. Tap in the Material field.

   The Material window opens.

3. Select the material report item that you want to delete.

The Set Material window opens containing the **Delete** button. If Oracle Mobile Field Service / Palm is synchronized after the creation of the desired material report item, then the **Delete** button will not be present in the Set Material window.

4. Tap **Delete**.

   Oracle Mobile Field Service / Palm returns you to the Material window where the desired material report item is no longer present.

3.8.5 Creating 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. Oracle Mobile Field Service / Palm enables you to add expense report items regardless of the task status.

Prerequisites

- Opening a task from the Calendar screen. See "Working with Your Calendar" on page 3-6.
- Selecting View Debrief in the Task screen. See "Viewing and Changing Task Information" on page 3-10.

Steps

Complete the following steps to create an expense report:

1. Navigate to the Calendar screen and tap the desired task.

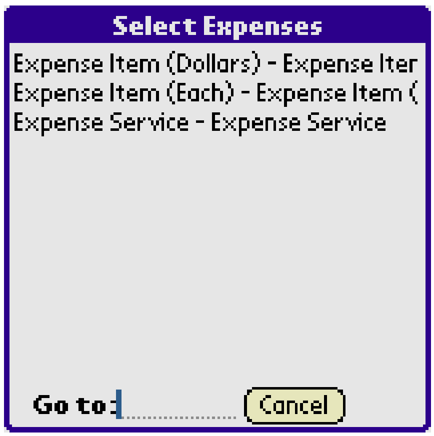
The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

2. Select **View Debrief** from the drop-down list at the bottom of the screen.

   The Report screen opens. See "Reporting" on page 3-35 for a description of this screen.

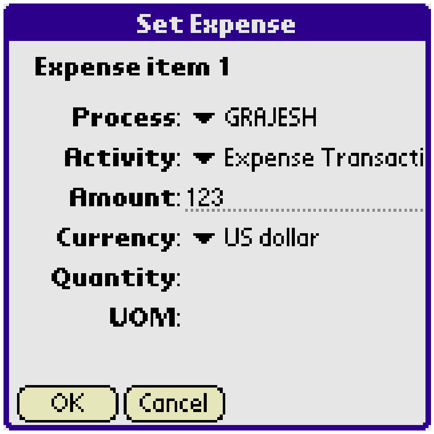
3. Tap in the Expense field.

   The Select Expense window opens.



4. Tap the desired expense type.

   The Set Expense window opens with the selected expense type at the top of the window and a default business process in the Process drop-down list. In this example, the default business process is GRAJESH.



5. If you are not satisfied with the default business process, then make the appropriate selection from the Process drop-down list.
6. From the Activity drop-down list, select the appropriate service activity.

In the following steps, specify the amount of money used to complete the task. Complete *either* steps 7 and 8 *or* steps 9 and 10, according to your business process.

7. In the Amount field, specify the amount of money that was needed to complete the task.

> **Note:** The value for the Amount and Quantity fields cannot exceed 16-digits. Also, these fields supports integer values, such as 0.75 and 5.25.

8. From the Currency drop-down list, specify the currency being used.
9. In the Quantity field, specify the quantity of items used to complete the service request.
10. From the UOM drop-down list, select the currency being used.
11. Tap **OK**.

    The Expense screen opens. This screen displays the expense item along with the amount and currency.

12. Tap **Done** to add the expense item to the expense report and return to the Report screen.

    Tap **Add** to add the expense item to the expense report and return to the Select Expense screen to add another expense item.

3.8.6 Deleting an Expense Report Item

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

Prerequisite

- Creating an expense report item. See "Creating an Expense Report Item" on page 3-44.

Steps

Complete the following steps to delete an expense report item:

1. For a desired task, navigate to the Report screen.

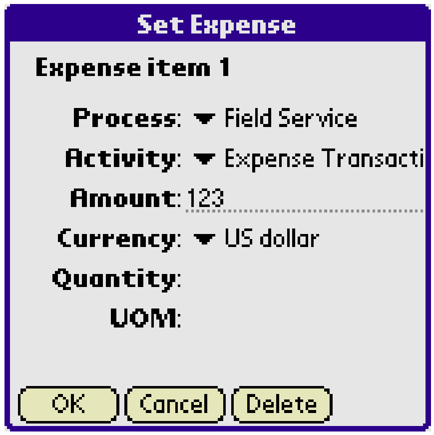
   See "Creating an Expense Report Item" on page 3-44 for a complete description of this procedure.

2. Tap in the Expense field.

   The Expense window opens.

3. Select the material report item that you want to delete.

The Set Expense window opens containing the **Delete** button. If Oracle Mobile Field Service / Palm is synchronized after the creation of the desired material report item, then the **Delete** button will not be present in the Set Expense window.



4. Tap **Delete**.
5. Oracle Mobile Field Service / Palm returns you to the Expense window where the desired expense report item is no longer present.

3.8.7 Printing Report Information

Oracle Mobile Field Service / Palm enables you to print a task summary report that contains the labor, material, and expenses that were necessary to complete a task. The information in this report is limited to what you recorded for a particular task.

Prerequisites

Create one, some, or all of the following reports:

- Labor report, see "Creating a Labor Report Item" on page 3-35
- Material report, see "Creating a Material Report Item" on page 3-39
- Expense report, see "Creating an Expense Report Item" on page 3-44

Steps

Complete the following steps to create a summary report:

1. Navigate to the Calendar screen and tap the desired task.

The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

2. Select **View Debrief** from the drop-down list at the bottom of the screen.

   The Report screen opens. See "Reporting" on page 3-35 for a description of this screen.

3. Tap **Print**.

   Ensure that the Palm handheld is pointing towards a printer that supports infrared communication.

Note: Oracle Mobile Field Service/Palm only supports infrared printing.

3.9 Obtaining an Electronic Signature

Oracle Mobile Field Service / Palm enables you to obtain a customer's electronic signature for a task. The customer's electronic signature indicates that the task is complete and that the customer has accepted your work.

Steps

Complete the following steps to obtain an electronic signature:

1. Navigate to the Calendar screen and tap the desired task.

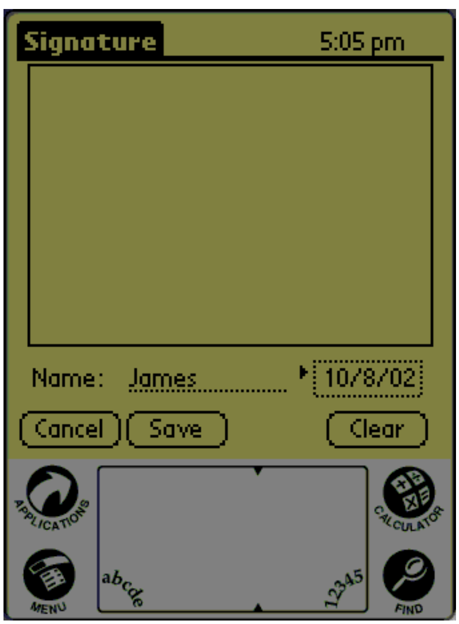
   The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

2. Select **View Debrief** from the drop-down list at the bottom of the screen.

   The Report screen opens. See "Reporting" on page 3-35 for a complete description of this screen.

3. Tap **Sign**.

   The Signature screen opens with the customer name in the Name field and the date to the right of this field. To view a customer name that is not completely displayed, tap on the arrow to the right of the Name field.



4. Have the customer use the Palm stylus to sign in the writing area of the Palm handheld.

5. Tap **Save**.

   Oracle Mobile Field Service/Palm returns to the Report screen.

   Tap **Cancel** to exit the Signature screen without saving a signature or tap **Clear** to clear a signature.

3.10 Recording Credit Card Information

Giving the customer the ability to pay by credit card is a convenience for both the customer and the service organization. Oracle Mobile Field Service / Palm enables you to record or update the following credit card information:

- 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.

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 record or update credit card information:

1. Navigate to the Calendar screen and tap the desired task.

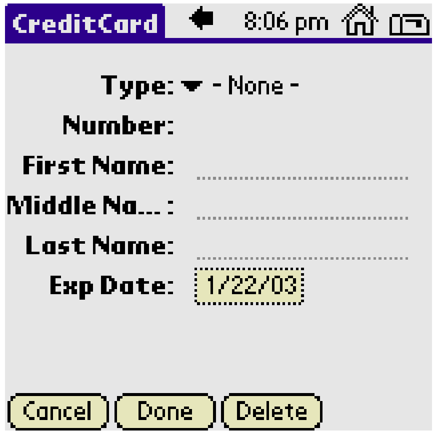
   The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

2. Select **View Debrief** from the drop-down list at the bottom of the screen.

   The Report screen opens. See "Reporting" on page 3-35 for a complete description of this screen.

3. Tap **Credit**.

   The Credit Card screen opens.



4. From the Type drop-down list, select the credit card type.
5. Complete the Number and Exp Date fields with the customer's credit card information.

   Oracle Mobile Field Service / Palm encrypts the customer credit card information. This is indicated with all but the last four credit card digits X'ed out in the Number field.
6. Complete the First Name, Middle Name, and Last Name fields with customer information.
7. Tap **Done**.

   Oracle Mobile Field Service / Palm returns you to the Report screen.

   Tap **Cancel** to return to the Report screen without saving any credit card information. Tap **Delete** to clear the contents of the Credit Card screen.

3.11 Setting Counter Readings

You can log a service request for a customer product that contains a counter. A copier having a number-of-copies counter is an example of this.

In the Counter screen, there can be multiple readings listed for a customer product. For each counter, you can learn about the historic readings. You can also create new readings for a customer product counter. You can reset a reading as well as make miscellaneous readings.

A counter reading consists of the following:

- Name
- Time stamp
- Value
- Unit of measure

3.11.1 Creating a New Counter Reading

Prerequisites

- Opening a task from the Calendar screen. See "Working with Your Calendar" on page 3-6.
- Selecting View Debrief in the Task screen. See "Viewing and Changing Task Information" on page 3-10.
- Using the Report screen. See "Reporting" on page 3-35.

Steps

Complete the following steps to set a counter reading:

1. Navigate to the Calendar screen and tap the desired task.

   The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

2. Select **View Debrief** from the drop-down list at the bottom of the screen.

   The Report screen opens. See "Reporting" on page 3-35 for a complete description of this screen.

3. Tap **Counter**.

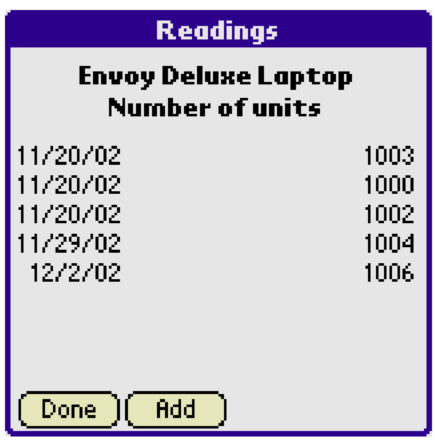
   The Counter screen opens with the counter(s) listed.

4. Tap on the desired counter.

   In this case, `Number of units` is the only counter for the customer product, `Envoy Deluxe Laptop`.

5. Tap the customer product, `Envoy Deluxe Laptop`.

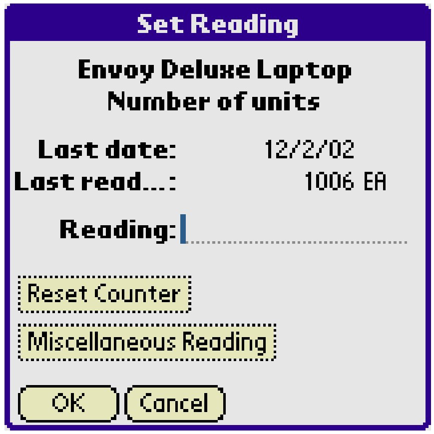
   The Readings window opens. If there are too many reading to display, then up and down arrow button will be present for you to use to scroll.



6. To add a new counter reading, tap **Add**.

   The Set Reading screen opens.

   Tap **Done** to view the readings and return to the Counters screen.



The reading date appears in the Last date field and the last reading value appears in the Last reading field.

7. In the Reading field, enter a reading value and then tap **OK**.

   Oracle Mobile Field Service / Palm returns you to the Readings window where the new reading is listed.

   For a description of the Reset Counter procedure, see "Resetting a Counter Reading" on page 3-58. For a description of the Miscellaneous Reading procedure, see "Creating a Miscellaneous Counter Reading" on page 3-59.

Note: Depending how your counter is defined, you may have to enter a reading that is either less than or greater than the last counter reading. Or your counter may be defined with no restrictions.

3.11.2 Changing a Counter Reading

Steps

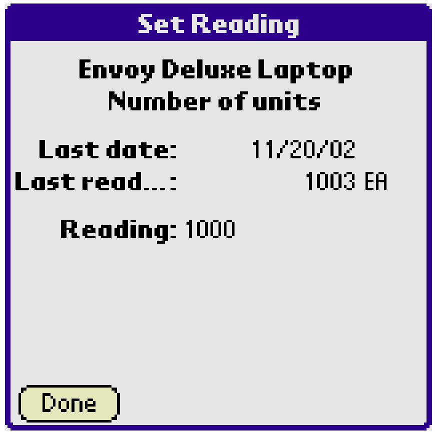
Complete the following steps to change a counter reading:

1. Navigate to the Readings window.

   See "Creating a New Counter Reading" on page 3-54 for a complete description of this procedure.

2. Tap on a counter reading.

The Set Reading window opens.



The reading date appears in the Last date field and the last reading value appears in the Last reading field. The counter reading value for the customer product appears in the Reading field.

3. In the Reading field, select the old counter reading and then re-enter a new reading.

4. Tap **Done**.

   Oracle Mobile Field Service/Palm returns you to the Readings window where the new counter reading is listed.

Note:

- Depending how your counter is defined, you may have to enter a counter reading that is either less than or greater than the last counter reading. Or your counter may be defined with no restrictions.
- You can also change a counter reading by tapping Add in the Readings window. In this case, the Set Reading window opens with options to reset the counter and add a miscellaneous reading. See "Creating a New Counter Reading" on page 3-54.

Oracle Mobile Field Service/Palm returns you to the Readings window.

3.11.3 Resetting a Counter Reading

Steps

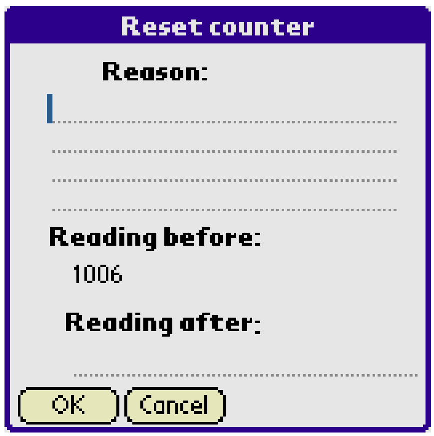
Complete the following steps to reset a counter reading:

1. Navigate to the Set Reading window.

   See "Creating a New Counter Reading" on page 3-54.

2. Tap Reset Counter.

   The Reset Counter window opens.



3. In the Reason field, enter a statement describing your reason for resetting the counter.
4. In the Reading after field, enter a value to reset the counter.

> **Note:** Depending how your counter is defined, you may have to enter a counter reading that is either less than or greater than the last counter reading. Or your counter may be defined with no restrictions.

5. Tap **OK**.

   Oracle Mobile Field Service / Palm returns you to the Readings window.

3.11.4 Creating a Miscellaneous Counter Reading

Steps

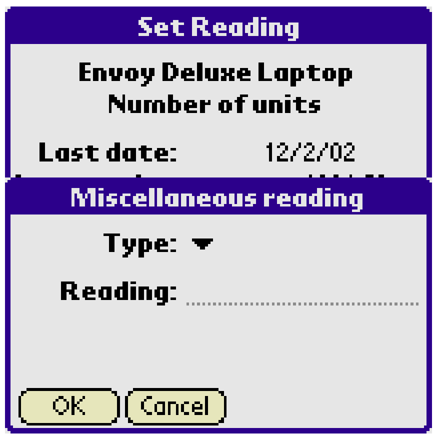
Complete the following steps to create a miscellaneous counter reading:

1. Navigate to the Set Reading window.

   See "Creating a New Counter Reading" on page 3-54.

2. Tap **Miscellaneous Reading**.

   The Miscellaneous Reading window opens.



3. From the Type drop-down list, select the reading type.

4. In the Reading field, enter the counter reading and then tap **OK**.

   Oracle Mobile Field Service / Palm returns you to the Set Reading window.

   Tap **Cancel** to return to the Set Reading window without saving any miscellaneous reading information.

3.12 Spare Parts Management

Spare parts management includes ordering parts and viewing part orders.

3.12.1 Ordering a Part

Steps

Complete the following steps to order a part:

1. From the Calendar screen, select **Create Parts Order** from the drop-down list at the bottom of the screen and then tap **Go**.

   The Parts Search screen opens.

2. If you know the part for which you want to search, complete the following fields and then tap **Search**:

   - In the Part No field, specify the part number for the desired part.
   - In the Description field, specify the name of the desired part.

   The Order screen opens.

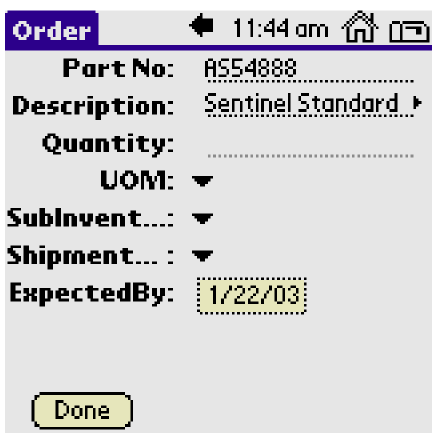
3. If you do not know the part for which you want to search, then tap **Search** without completing any fields.

   The Search Results window opens. Tap **Cancel** in the Parts Search screen to return to the Calendar screen.

4. Select a part and then tap **Order**.

   The Order screen opens.

   In the Search Results window, if there are too many parts to display, a scroll bar appears with up and down arrow buttons. Use these buttons to scroll through the parts list. If the part you select is not orderable, Oracle Mobile Field Service/Palm displays a warning message.



   The Part No field is read-only and contains the part number for the selected part. The Description field is also read-only and contains the name of the selected part.

5. From the UOM drop-down list, select unit of measure to be used when ordering the desired part.
6. From the Subinventory drop-down list, select the subinventory from which you want to receive the desired part.
7. From the Shipment drop-down list, select the address where you want the part delivered.
8. To change the delivery date, tap in the Expected by field and make the appropriate change.

   See "Using the Go to Date Window" on page 3-8 for a complete description of this procedure.
9. Tap **Done**.

   Oracle Mobile Field Service / Palm displays a message with the required part number. In this same message, you are prompted to create a part order. Tap **OK** to create the order and return to the Calendar screen. Tap **Cancel** to decline the order and return to the Order screen.

3.12.2 Viewing Part Orders

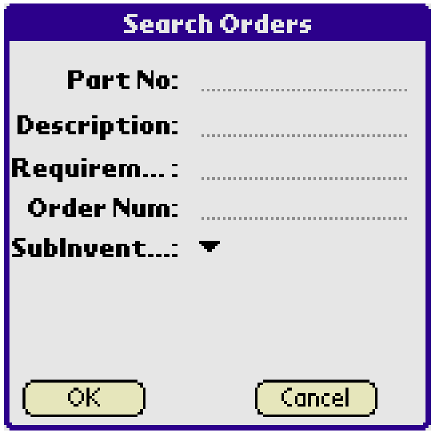
After a part has been ordered, you can view part orders to see what parts have been ordered.

Steps

Complete the following steps to view part orders:

1. From the Calendar screen, select **View Part Orders** from the drop-down list at the bottom of the screen and then tap **Go**.

   The Search Orders window opens.



If you know the part order for which you want to search, complete step 2 without completing step 3.

If you do not know the part order for which you want to search, complete step 3 without completing step 2.

2. Complete the following and then tap **OK**:

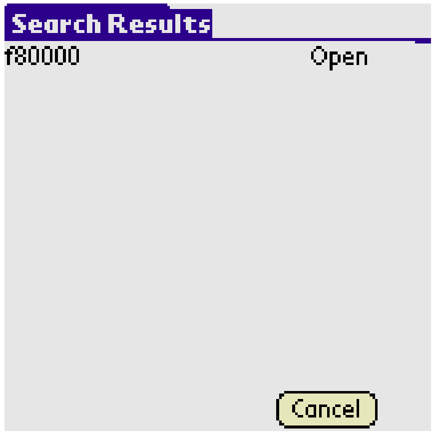
   - In the Part No field, specify the part number for the desired part.
   - In the Description field, specify the name of the desired part.
   - In the Requirement field, specify the requirement number.
   - In the Order Number field, specify the part order number.
   - From the Subinventory drop-down list, select the subinventory where the desired part is to be stored.

   The Order screen opens, displaying read-only information about the part order. See "Ordering a Part" on page 3-60 for a complete description of this screen.

3. Tap **OK** without completing any fields.

   The Search Results screen opens.

   Tap **Cancel** in the Search Order screen to return to the Calendar screen.



4. Tap on a part order.

   The Order screen opens, displaying read-only information about the part order. See "Ordering a Part" on page 3-60 for a complete description of this screen.

3.13 Viewing Customer Information

You view the following customer information in the Customer screen:

- Name and number
- Address
- Phone number
- Contact name
- Service request
- Contract information

Prerequisites

Opening a task from the Calendar screen. See "Viewing and Changing Task Information" on page 3-10.

Steps

Complete the following steps to view customer information:

1. Open the Customer screen.

   There are two ways to open the Customer screen:

   To open the Customer screen from within a task:

   - From the Calendar screen, tap the desired task.

     The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

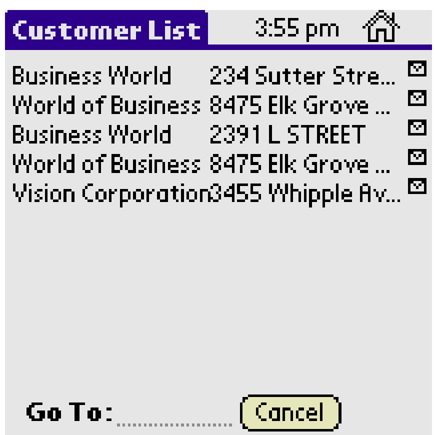
   - Tap the envelope icon near the Customer field or choose **View Customer** from the drop down list at the bottom of the screen.

     The Customer screen opens with the customer number in the Cust num field

To open the Customer screen with no task open:

- From the drop-down list at the bottom of the Calendar screen, select **View All Customers** and then tap **Go**.

  The Customer List screen opens. For each customer, this screen displays the customer name, address, and envelope icon used to view the complete address.



- Tap on the desired customer.

  The Customer screen opens.

Note: Contact and service request information is absent from this screen because this information is task-related. To see this information in the Customer screen, access the Customer screen from within a task.

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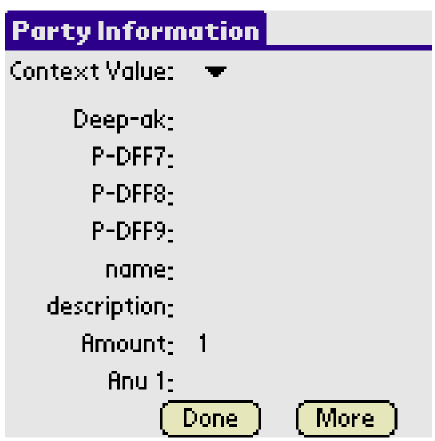
2. To view or add information in the customer flexfields, tap on the flexfields icon in the upper right corner of the window.

   The Party Information screen opens.



This graphic is a typical view of the Party Information screen. In this example, Context Value drop-down list, Deep-ak, P-DFF7, P-DFF8, P-DFF9, name, description, Amount, and Anu are the customer flexfields.

Note: Customer flexfields are determined at the home office and cannot be changed or created in the field.

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3. Tap **Done**.

   Oracle Mobile Field Service / Palm returns you to the Customer screen.

4. In the Customer screen near the Cust num field, tap on the note icon to view or add a customer note.

   See "Creating and Viewing a Customer Note" on page 3-30 for a complete description of this procedure.

5. To view the complete customer address, tap on the envelope icon near the Address field.

   The Address Info window opens. This window contains the customer name, address, city, state, and zip code. To view any additional customer name information, tap on the arrow to the right of the Name field.

6. Tap **OK** to return to the Customer screen.

7. You can perform other functions from the Customer screen by making a selection from the drop-down list at the bottom of the screen and then tapping **Go**.

- For the he **View Service Request** selection, the SR Details screen opens. In this screen, you can view and change service request details, including the problem and resolution. See "Viewing and Changing Service Request Information" on page 3-15 for additional details.

Note: The **View Service Request** selection is available in the Customer screen only when this screen is accessed from an open task.

- For the **Create Service Request** selection, the Create SR screen opens. In this screen, you create a service request by specifying various information. See "Creating a Service Request" on page 3-23 for additional details.
- For the **View All Service Requests** selection, the SR List screen opens. In this screen, you can view all the service requests for a customer. See "Viewing the Service Request Task List" on page 3-20 for additional details.

3.14 Viewing Customer Product Information

Oracle Mobile Field Service / Palm enables you to view customer product information associated with a task.

Steps

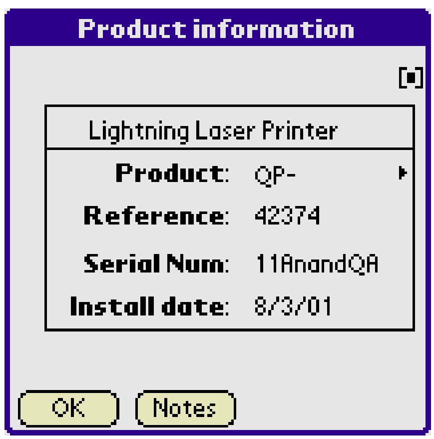
Complete the following steps to view information about a customer product:

1. Navigate to the Calendar screen and tap the desired task.

   The Task screen opens. See "Viewing and Changing Task Information" on page 3-10 for a complete description of this screen.

2. Tap on the customer product icon near the Product field.

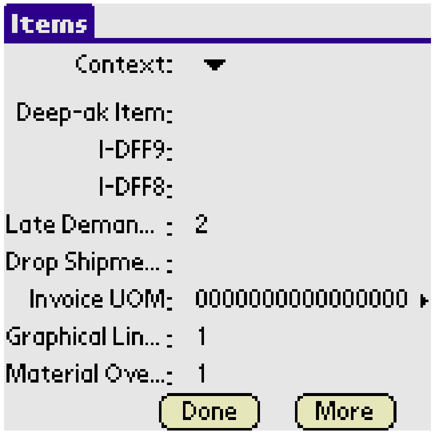
   The Product Information window opens. This window contains the customer product name, product number, reference, serial number, and install date.



   If the product name is too large to fit in the Product field, an arrow appears to the right of the Product field. Tap on this arrow to view any additional product name.

3. To view or add information in the customer product flexfields, tap on the flexfields icon in the upper right corner of the window.

   The Items screen opens. This screen contains the customer product flexfields.



This graphic is a typical view of the Items screen. In this example, Context drop-down list, Deep-ak Item, I-DFF9, I-DFF8, Late Demand, Drop Shipment, Invoice UOM, Graphical Line, and Material Over are the customer product flexfields.

Note: Customer product flexfields are determined at the home office and cannot be changed or created in the field.

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4. Tap **Done** to return the Product Information window.
5. Tap **Notes** in the Product Information window to view or add a customer product note.

   See "Creating and Viewing a Customer Product Note" on page 3-31 for a complete description of this procedure.
6. Tap **OK** in the Product Information window to return to the Task screen.

3.15 Messaging

This section describes how you can use messaging in the Oracle Mobile Field Service/Palm application.

3.15.1 Messaging Functionality

The messaging function enables the field service engineer to send and receive messages to other people within your organization.

- It can be used to send messages to all field service users, or to members of a group to which the field service representative is a member.
- You can use this function to ask for support or additional information. For example, you can also use messages to request new parts.

After you synchronize, you can see any new messages in the Mail screen (inbox view). You can make sure that a message you wrote has been sent by seeing if it is listed in the Mail screen (outbox view).

3.15.2 Reading, Sending, and Deleting Messages

This section describes how to do the following:

- Read messages that you have received,
- Send messages to other members of the field service organization
- Delete messages that you have read.

Steps

Complete the following steps to read, send, and delete messages:

1. Tap the mailbox icon at the top of any screen.

   The Mail screen opens, listing all the mail in your inbox. The inbox is the default view.

2. To read a message, tap on the message.

   The Read Mail window opens. In this window, you can read the message.

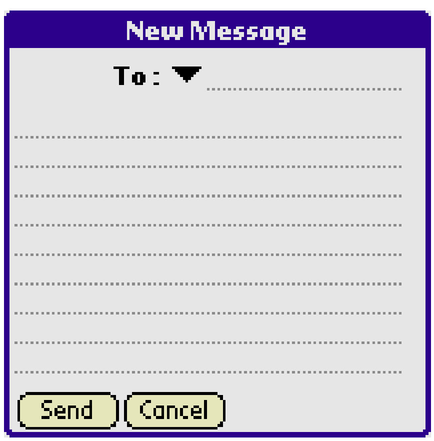
3. To delete this message, tap **Delete**.

4. To exit this message and return to the Mail screen, tap **Done**.

   A check mark appears to the left of the message you read, indicating that the message has been read.

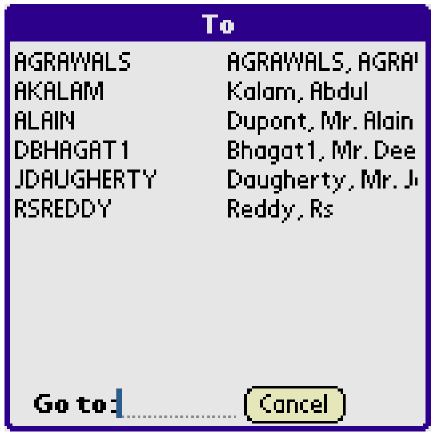
5. To create a new message, tap **New**.

   The New Message window opens.



6. From the To drop-down list, select the message recipient.

The To window opens.



When you need information from one of the other members of the field service organization, you can ask for it by sending a new message. You can also use messages to request new parts.

7. Tap on the name of the message recipient.

   Oracle Mobile Field Service / Palm returns you to the New Message window with the message recipient in the To field.

8. In the New Message window, enter your message in the text field.

   Note: If you did not complete the previous step, your message will not be associated with a recipient. Therefore, you will have re-create your message for a recipient.

9. Tap **Send**.

   The application returns you to the Mail screen (Inbox view). Tab the arrow at the top of the Mail screen and then select **Outbox**. In the Outbox view, you can view your sent messages.

   Note: Your sent message is not sent until you synchronize your Palm handheld.

3.16 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, you need to synchronize with the enterprise system.

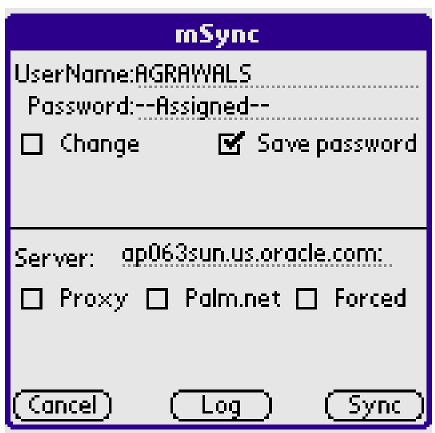
Steps

Complete the steps below to synchronize Oracle Mobile Field Service / Palm information with the enterprise system.

Note: If you are using HotSync, do not use this procedure.

1. Establish a telephone / internet connection for your Palm handheld.
2. Tap the mSync icon on the Palm desktop.

   The mSync window opens.



3. Complete the following fields and check boxes in the mSync window as described in the tables below:

Field	Description
User Name	mSync client user name. (This is the Mobile Field Service user name.)

Field	Description *(Cont.)*
Password	mSync client password. This field is case sensitive.
Server	IPaddress:port

Check box	Description
Change	Leave un-selected.
Save password	Select this check box to save the mSync user name and password.
Proxy	Select if appropriate.
Palm.net	
Forced	

4. Tap **Sync**.

   The information on your Palm handheld is synchronized with the enterprise system.

   > **Note:** Synchronizing your data could take a few minutes. Do not abort the synchronization. If the synchronization fails with errors, contact your system administrator.

   Tap **Cancel** to exit the mSync window without saving your work. Tap **Log** to open the mSync Log window and view the mSync history.

3.17 Closing the Application

When you have finished working in Oracle Mobile Field Service/Palm, logout of the application.

Prerequisites

Save all data and be ready to exit the application.

Steps

Complete the following to logout of Oracle Mobile Field Service/Palm:

- Tap the home icon at the top of any screen.

  See "Using Global Functionality" on page 3-5 for a further description of the home icon.

  Oracle Mobile Field Service/Palm checks that all data has been correctly saved and then closes. The Palm handheld returns to the Palm desktop where all the applications are listed.

4

General Operating Rules

This chapter describes some general operating rules of Oracle Mobile Field Service/Palm that may not be obvious. Some of these rules are based on the following scenarios:

- Scenario 1: Complete Scheduled Tasks in Pre-determined Order
- Scenario 2: Complete One Scheduled Task at a Time in Any Order
- Scenario 3: Complete Multiple Scheduled Tasks in Any Order

For a complete description of these scenarios, see "Order of Task Completion" on page A-1.

The following are the general rules for working in Oracle Mobile Field Service/Palm:

- You can add notes, but notes are not updatable once completed.
- You can update and create debrief items for a task that does not have the status of completed or for a task that you have not yet synchronized with the enterprise system. (Synchronized debrief lines cannot be updated.)

  See "Understanding the Calendar Screen" on page 3-6 for a complete description of the task status flags.
- You cannot delete debrief lines after the debrief items are synchronized.
- If several working tasks are synchronized to the Palm handheld in Scenario 1 or Scenario 2, you can work on both tasks until they are closed. Then you must handle your tasks in compliance to the profile setting.
- Scenario 1 will be the default when there is no profile set.
- Once you synchronize, a signature cannot be updated.
- Once a you complete or close a task, you cannot add counters.

- Counters are not updatable.

A

Setting up Schedules and Responsibilities

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

A.1 Conform to the Schedule

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

- task 1: 8:00 Installation at Customer A
- task 2: 9:00 Repair on-site at Customer B
- task 3: 10:00 Installation at Customer C

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

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

A.2 Order of Task Completion

If you send more than one field service representative to perform a task, make sure that you schedule only one task assignment at a time, because multiple task assignments can lead to conflicts. For example, suppose you have a task that requires three field service representatives. You set up the task and then you send it to the agendas of all three representatives. It now appears on their agendas. However, if one of your field service representatives changes the time for his task, that would affect the agenda of the other two representatives. To avoid this, you must create three tasks, one for each representative.

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

Scenario 1: Complete Scheduled Tasks in Pre-determined Order

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

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

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

Scenario 3: Complete Multiple Scheduled Tasks in Any Order

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

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

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