Oracle® Mobile Field Service

User Guide for Pocket PCs

Release 11*i*

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

Part No. B12193-02

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

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

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

Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Mobile Field Service User Guide for Pocket PCs*. This guide describes how to use the Oracle Mobile Field Service / Pocket PC 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 Pocket PCs* describes how to use Oracle Mobile Field Service / Pocket PC. The guide is composed of the following chapters:

- Chapter 1, "Understanding Oracle Mobile Field Service / Pocket PC" describes what Oracle Mobile Field Service / Pocket PC 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 / Pocket PC" describes what is needed to install and use the Oracle Mobile Field Service / Pocket PC application. It also describes how to launch the application.
- Chapter 3, "Using Oracle Mobile Field Service / Pocket PC" describes how to use Oracle Mobile Field Service / Pocket PC to process service requests and tasks.
- Chapter 4, "General Operating Rules" describes some general operating rules of Oracle Mobile Field Service / Pocket PC 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/Pocket PC.

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/Pocket PC 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/Pocket PC.

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 Guide

This guide explains how to implement and administer the Oracle Mobile Field Service application, for either a laptop computer, Palm handheld, or Pocket PC. 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/Pocket PC 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/Pocket PC 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/Pocket PC

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

1.1 About Oracle Mobile Field Service/Pocket PC

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

Because the Oracle Mobile Field Service / Pocket PC runs on a Pocket PC, it is highly mobile and usable. The service request, and all associated information, is stored locally on the Pocket PC. This enables field service representatives 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
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/Pocket PC	This application is a disconnected application for a Pocket PC so field service representatives can receive their daily schedule and report on progress, material, expense, and labor.

1.3 The Oracle Field Service Process

The field service process has six basic steps. This process starts with the creation of a service request. The service request has at least one task, which is completed by a field service representative in the field. After completing a task, 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 basic steps of the field service process are 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.

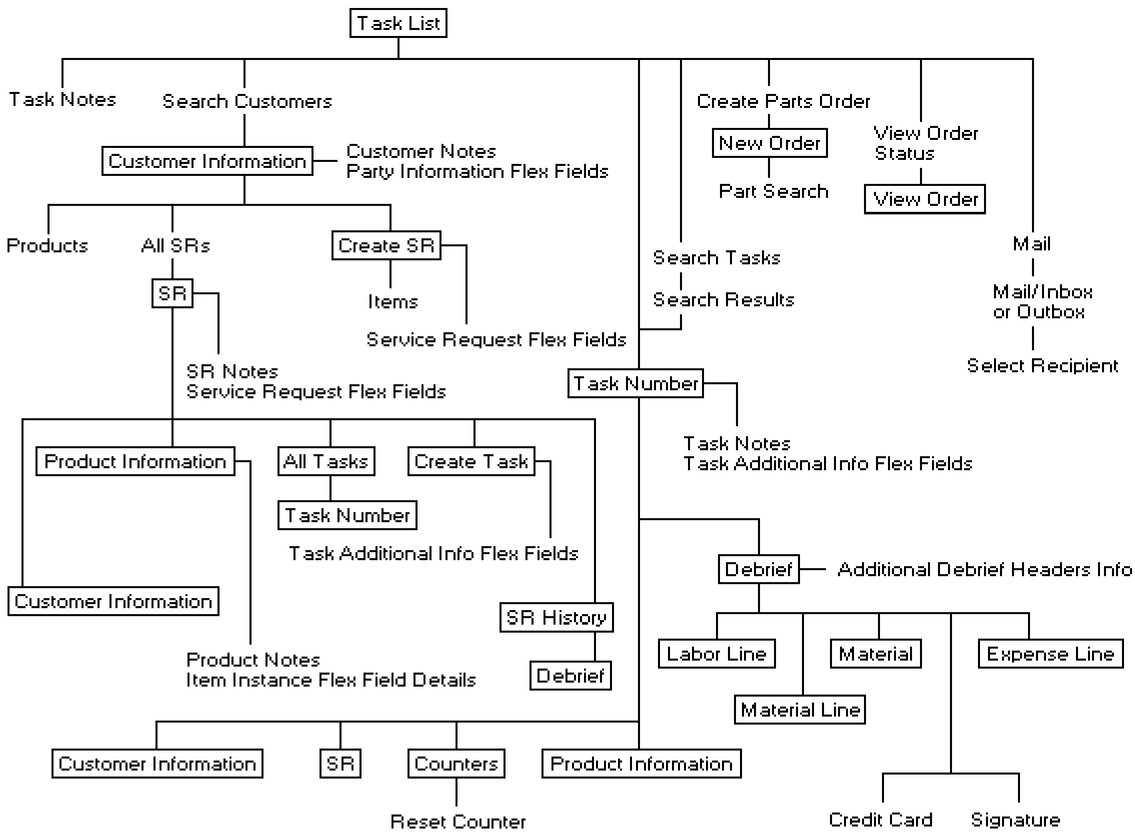
Steps	Description
2. Service request screening and qualification	After a service request is created, it is screened to avoid a field visit. The service request is analyzed by a support agent who searches the knowledge base for a solution. As an outcome of this process, the request may be closed, a part 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 / Pocket PC. In this application, the schedule is received by the service representative on his Pocket PC. 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 / Pocket PC.



In Oracle Mobile Field Service / Pocket PC, there are screens with and without global functionality. A screen that has global functionality contains various global icons in the lower portion of the screen. See "Using Global Functionality" on page 3-5 for further details. In the above diagram, text within a rectangle represents a screen with global functionality.

The Task List screen is where you start in Oracle Mobile Field Service / Pocket PC. The Task List screen is the "Home" screen. From this screen, you can access your tasks for the current day or all the tasks assigned to you, both past, present, and future. From the Task List screen, you can locate a desired task by either opening the Search Customers screen to access the task for a desired customer or you can open the Search Task screen to access the desired task. Also from the Task List screen, you can create a part order in the New Order screen and then monitor the part order status in the View Order screen. Other functions you can perform from the Tasks List screen include viewing and creating notes, opening the Task Number screen, and accessing the Mail Inbox and Outbox.

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

The SR screen is where you can access product information and open the All Tasks, Create Task, and SR History screens. In addition, you can open and create service request notes and access service request flexfield information.

The Customer Information screen is where you can view the customer’s address and access and create customer notes and any Party Information flexfields. From this screen, you can also access the All Products, All SRs, and Create SR screens.

From the Debrief screen, you can access any Additional Debrief Headers Info flexfield information. Also from this screen, you can open the Credit Card and signature screens. The Debrief screen is where you can view the labor time, materials, and expenses incurred while completing the service request.

From the All Tasks screen, you can view all the tasks for the current service request. From this screen, you can open the Task Number screen.

The Create Task screen enables you to create a task and access task flexfields in the Task Additional Information screen.

The SR History screen provides you with service request history. From this screen, you can also open the Debrief screen.

From the Counters screen, you can set, reset, and change readings. You can also access the Reset Counter screen from here.

See the appropriate sections in this guide for more details about each screen.

2

Installing Oracle Mobile Field Service/Pocket PC

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

This chapter describes the installation requirements for the Oracle Mobile Field Service/Pocket PC application. It also describes how to launch the application on the Pocket PC.

2.1 Minimum Hardware Requirements

This section describes the minimal desktop PC and Pocket PC hardware necessary to run the Oracle Mobile Field Service/Pocket PC 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
- Other requirements: serial port, Internet connection, mouse or pointer device

2.1.2 Pocket PC Hardware Requirements

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

- Pocket PC 2000, Pocket PC 2002, Pocket PC 2003 device
- Processor supported:
  - ARM
  - XScale
- 16 MB RAM

2.2 Minimum Software Requirements

This section describes the minimal PC and Pocket PC software necessary to run the Oracle Mobile Field Service / Pocket PC 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 2000, Windows XP, or Windows ME
- ActiveSync 3.6 and above

2.2.2 Pocket PC Software Requirements

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

- Operating System: Pocket PC 2000, Pocket PC 2002, Pocket PC 2003

2.3 Minimum Pocket PC Communication Requirements

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

- Wired modem
- Wireless modem

2.4 Installing the Application on Your Pocket PC

For the minimum hardware and software requirements for a Pocket PC, see "Minimum Hardware Requirements" on page 2-1 and "Minimum Software Requirements" on page 2-2.

To install Oracle Mobile Field Service / Pocket PC on your Pocket PC, complete the procedures in the order listed in the following table:

Procedure	Performed At
1. Downloading and Installing the Oracle9i Lite Setup Program	Client PC (the PC that the Pocket PC HotSyncs to)
2. Configuring mSync on the Pocket PC	Pocket PC
3. Performing a Full Synchronization	Pocket PC
4. Launching Oracle Mobile Field Service / Pocket PC	Pocket PC

2.4.1 Downloading and Installing the Oracle9*i* Lite Setup Program

Perform this procedure from the client PC desktop. In this procedure, you will download the mobile client from the Mobile Server and install the Oracle9i Lite setup program.

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://130.35.88.214:8000/setup`

3. Click the link to download the mobile client for WinCE 3.0 on Pocket PC StrongARM setup program and save it.

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

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

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

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

   The Setup program downloads all the required components.

2.4.2 Synchronizing the Client Desktop PC with the Pocket PC

Complete this procedure to synchronize the client desktop PC with the Pocket PC. This synchronization puts the Oracle9*i* Lite components, Oracle Mobile Field Service/Pocket PC, and the database on the Pocket PC.

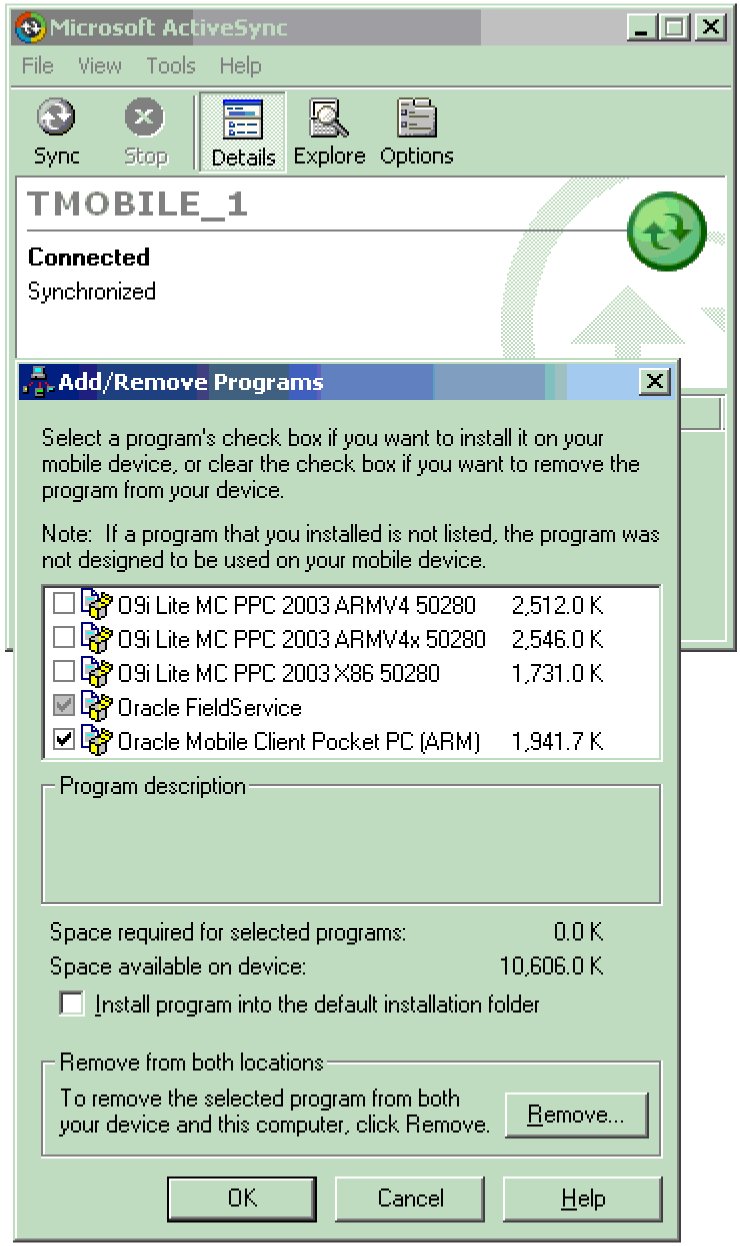
Steps

1. Connect the Pocket PC to the client desktop PC.

2. If you have not installed the Microsoft ActiveSync, install it and rerun the setup program.

3. Start Microsoft ActiveSync and then install Oracle9*i* Lite.

   Choose `Tools > Add remove > [processor type]`, where `[processor]` is either SH3, SH4 or ARM.



4. Perform an ActiveSync to put Oracle9*i* Lite components on the Pocket PC.

Note: To do an ActiveSync to retrieve Oracle Mobile Field Service / Pocket PC itself and the data associated with it, the computer that hosts the ActiveSync manager must be able to connect to the mobile server using HTTP. Therefore, You must be able to connect to the mobile server through HTTP.

You can also retrieve the application and copy the data onto the Pocket PC by connecting to any of the following modes:

- Wireless
- Infrared
- USB
- ActiveSync
- Modem

2.4.3 Configuring mSync on the Pocket PC

Complete this procedure to install the Oracle Mobile Field Service / Pocket PC application and the database on the Pocket PC.

Steps

1. On the Pocket PC, choose `Start > Programs`.

   The Programs screen opens.

2. Tap the File Explorer icon.

   The My Documents screen opens.

3. From the drop-down menu, choose `MyDevice`.

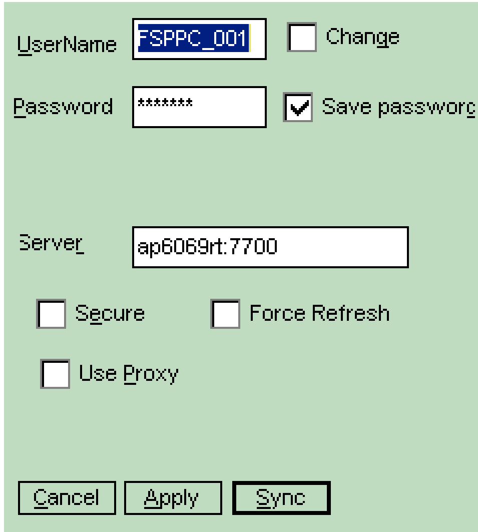
   The My Device screen opens.

4. Tap the Orace folder.

   The Orace screen opens containing the mSync file

5. Tap on the mSync file to open it.

   The mSync screen opens.



6. In the mSync screen, specify information as indicated in the following table and then tap **Apply**:

Information	Description
User Name	mSync client user name. This is case insensitive. (This is the Mobile Field Service username.)
Password	mSync client password. This is case insensitive.
Change check box	Leave this check box deselected.
Save Password check box	Select this check box to save the mSync username and password.
Server	IPaddress:port
Use Proxy	Select this check box if appropriate.
Force Refresh	Leave this check box deselected.

2.4.4 Performing a Full Synchronization

Perform a full synchronization to retrieve Oracle Mobile Field Service / Pocket PC and data.

Steps

Complete the following steps to perform a full synchronization:

1. Ensure that you are connected to the network.
2. Tap **Sync** to start the synchronization.

   After the ActiveSync, the mobile database and the mobile application are replicated to the client.

2.4.5 Launching Oracle Mobile Field Service/Pocket PC

Complete the following procedure to launch Oracle Mobile Field Service / Pocket PC.

Steps

1. On the Pocket PC, choose `Start > Programs`.

   The Programs screen opens.
2. Tap the File Explorer icon.

   The My Documents screen opens.
3. From the drop-down menu, choose `MyDevice`.

   The My Device screen opens.
4. Tap the Orace folder.

   The Orace screen opens containing the `Fieldservice.exe` file
5. Click on `Fieldservice.exe`.

   The Oracle Mobile Field Service / Pocket PC opens.

2.4.6 Creating a Shortcut for Oracle Mobile Field Service/Pocket PC

Complete the following steps to create a desktop shortcut for Oracle Mobile Field Service / Pocket PC:

1. Select the `FieldService.exe` file in the `\My Device\Orace` directory to get the selection options.

   This is the same as the cut-and-paste option on the Pocket PC.
2. Choose the Copy option.
3. Go to the directory where the link is to be created.

For example, `\My Device\Windows\Start Menu`.

4. Click on the **Edit** option in the bottom menu bar.
5. In the Menu pop-up, select **Create Shortcut**.

   The application can now be accessed through the shortcut and will be listed in the Start Menu list of programs.

2.5 Subsequent Synchronizations

This section describes how to synchronize the database on the Pocket PC.

Steps

1. Go to the Oracle Mobile Field Service application.
2. Go to the home page of the application.
3. Click on the mSync icon.

3

Using Oracle Mobile Field Service/Pocket PC

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

- View your task list for the day or all tasks assigned to you
- 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
- 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 / Pocket PC:

- 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 / Pocket PC

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

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

   See "Synchronizing with the Enterprise System" on page 3-84.

3. Review your calendar for the day.

   See "Working with Your Task List" on page 3-6.

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

   See "Viewing and Changing Task Information" on page 3-11.

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

   See "Viewing and Changing Task Information" on page 3-11.

6. Learn the customer address.

   See "Viewing Customer Information" on page 3-72.

7. Review service request information.

   See "Working with Service Requests" on page 3-19

   - Review contract information.

     See "Viewing Contract Information" on page 3-23.

   - Review service history information.

     See "Viewing Service Request History" on page 3-26.

   - Create or update a customer note if necessary.

See "Creating and Viewing a Note" on page 3-32.

8. Set any counter and counter properties.

   See Counter Readings on page 3-64.

9. Report task details.

   See "Debrief Reporting" on page 3-37.

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

11. Finally, exit out of Oracle Mobile Field Service / Pocket PC.

   See "Closing the Application" on page 3-86.

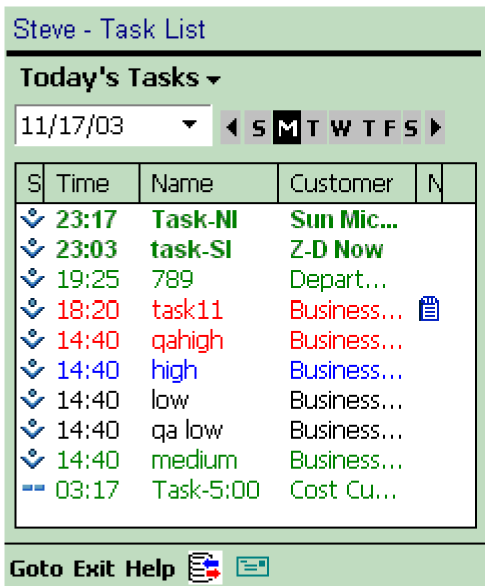
3.2 Launching Oracle Mobile Field Service/Pocket PC

Complete this procedure to launch Oracle Mobile Field Service / Pocket PC.

Steps

1. Choose `Start > FieldService`.

   Oracle Mobile Field Service / Pocket PC opens in the Task List screen. This screen is the starting point in the Oracle Mobile Field Service / Pocket PC application. See "Working with Your Task List" on page 3-6 for a complete description of the Task List screen.



2. Tap the synchronization icon in the lower portion of the screen to synchronize Oracle Mobile Field Service / Pocket PC with the enterprise system.

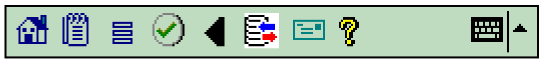
   See "Synchronizing with the Enterprise System" on page 3-84 for a complete description of this procedure.

   It is necessary to synchronize Oracle Mobile Field Service / Pocket PC before beginning your work to ensure that you receive and send the latest updates to the enterprise system.

3.3 Using Global Functionality

Oracle Mobile Field Service / Pocket PC provides various global functions in many of its screens. At the bottom of these screens, you can access global functionality through global icons.

The following graphic shows all the possible global functionality found in Oracle Mobile Field Service / Pocket PC.



The global icons perform the following functions:

 Tap the home icon to go to the Task List screen

 Tap the notes icon to create or view notes (see "Creating and Viewing a Note" on page 3-32)

 Tap the left flexfields icon to view or create flexfield information

 Tap the complete icon to close the screen and return to the previous screen

 Tap the left arrow icon to return to the previous screen

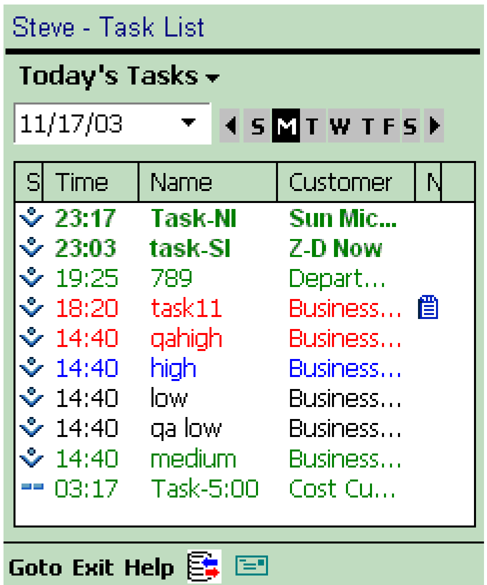
 Tap the synchronize icon to synchronize Oracle Mobile Field Service / Pocket PC with the enterprise system (see "Synchronizing with the Enterprise System" on page 3-84)

 Tap the mail icon to access messaging (see "Messaging" on page 3-81)

 Tap the help icon to go to receive general and Oracle Mobile Field Service / Pocket PC-specific help

3.4 Working with Your Task List

The Task List screen is the starting point in the Oracle Mobile Field Service / Pocket PC application. The Task List screen lists non-closed tasks in descending order based on the scheduled date and time stamp. See "Viewing a Past or Future Task List" on page 3-8 to view the tasks for a different day.



3.4.1 Understanding the Task List Screen

The Task List screen is updated each time you synchronize with the enterprise system. See "Synchronizing with the Enterprise System" on page 3-84 for a complete description of this procedure.

You can to do the following from the Task List screen:

- View tasks for the day
- View all task assigned to you, past, present, and future
- Access task information for a selected task
- Access all customers for which you are assigned tasks
- Create a parts order

- View part order status

3.4.1.1 The Task List Screen Table

In the following table format, the Task List screen briefly describes the tasks:

- Column 1: Task status
- Column 2: Task start time
- Column 3: Task name
- Column 4: Customer of the task
- Column 5: Task note icon

If you tap in either the Status, Time, or Name column, Oracle Mobile Field Service / Pocket PC opens the Task Number screen for a task. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen. If you click in the Customer column, Oracle Mobile Field Service / Pocket PC opens the Customer screen for a task. See "Viewing Customer Information" on page 3-72 for a complete description of this screen. Finally, if you click in the Notes column, Oracle Mobile Field Service / Pocket PC opens the Task Notes screen for a task. See "Creating and Viewing a Note" on page 3-32 for a complete description of this screen.

3.4.1.2 Task Statuses

Column 1 of the Task List screen table uses one of the following symbols to indicate the task status:

Cancelled

Rejected

Assigned

Interrupted

Working

Completed

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

1. Upon initial download to the Pocket PC, a task has a status of "Assigned".
2. Once you review your schedule for the current day, change the status of "Assigned" tasks to "Accepted".

3. Before you start working on an "Accepted" task, change its status to "Working".
4. When you have successfully completed an "Accepted" task, change its status to "Completed".

See "Viewing and Changing Task Information" on page 3-11 to learn how to change the status of a task.

3.4.1.3 The Use of Color in the Task List Screen

The following colors are used in Oracle Mobile Field Service / Pocket PC to indicate the priority of a task:

- Red—priority 1
- Blue—priority 2
- Green—priority 3
- Black—priority 4

3.4.2 Viewing a Past or Future Task List

This section describes how to change to a past or future task list. There are two ways to do this:

- Using the date drop-down list
- Using the calendar bar

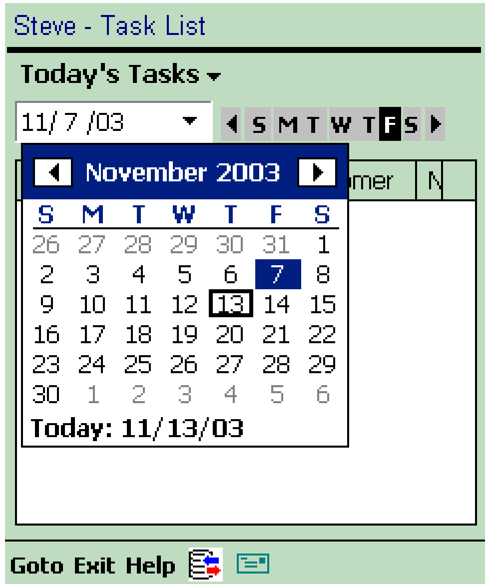
3.4.2.1 Using the Date Drop-down List

Steps

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

1. Tap the date drop-down list.

   A calendar appears.



2. To change the month or year, tap the left and right arrows at the top of the calendar.

   To change the year, continue tapping the appropriate arrow button until you reach the desired year and month.

   Alternatively, you can change the month by tapping on the month and then choosing the desired month from the pop-up list.

3. To change the day, tap the desired day in the calendar.

   Oracle Mobile Field Service / Pocket PC returns you to the Task List screen. Tap outside the calendar to return to the Task List screen without selecting a day. Tap **Today** to select the current day and return to the Task List screen.

3.4.2.2 Using the Calendar Bar

Steps

Complete the following steps from the Task List screen to go to the desired date:

- 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 Task List screen.

- 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 Task List screen.

3.5 Working with Tasks

A *task* is a unit of work within the service request. An administer creates a task during field service request screening and qualification in the office, or a field service representative creates a task 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 3-11 for a complete description of this procedure.

In Oracle Mobile Field Service / Pocket PC, you can enter various task information and even change some existing task information. The application also enables you to create a new task.

3.5.1 Viewing and Changing Task Information

From the Task Number screen, you can access information about the following:

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

Prerequisites

- Opening a task from the Task List screen. See "Working with Your Task List" on page 3-6 or "Viewing All Tasks for a Service Request" on page 3-25, respectively.

Steps

Complete the following steps to view and change task information:

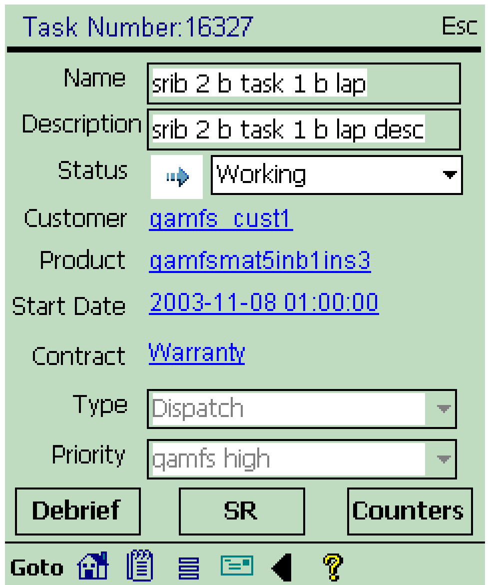
1. Navigate to the Task Number screen.

   Use one of the following means to open the Task Number screen:

   Open a Task Directly:

   - From the Task List screen, tap the desired task.

The Task Number screen opens and displays various information for the selected task, such as customer, customer product, contract, and problem details.



The following table describes the read-only information in the Task Number screen:

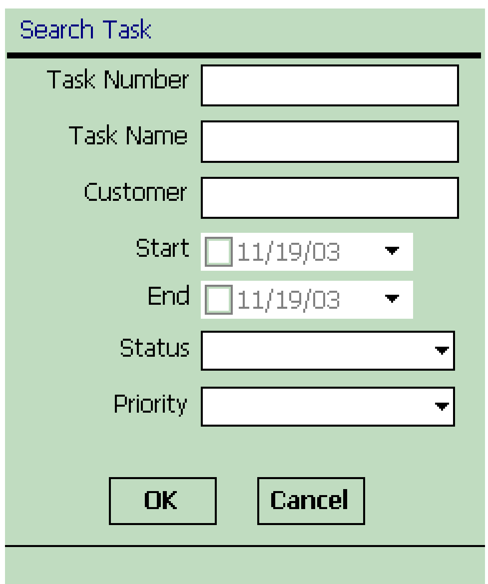
Read-only Information	Description
Task Number	Located in the screen title, this is a generated number for a task.
Name field	The name of the task.
Customer field	The name of the customer. Tap this field to view additional customer product information. See "Viewing Customer Information" on page 3-72 for a complete description of this procedure.
Product field	The name of the customer product that needs service. Tap this field to view additional customer product information. See "Viewing Customer Product Information" on page 3-77 for a complete description of this procedure.
Start Date field	The date the service representative will begin working on the task.

Read-only Information	Description
Contract field	The name of the customer contract. Tap this field to view additional contract information. See "Viewing Contract Information" on page 3-23 for a complete description of this procedure.
Type drop-down list	The type of task.
Priority drop-down list	The priority in which the task is to be completed.
Esc	If a task is escalated on the enterprise system, then "Esc" appears in the upper right corner of the of the Task Number screen, across from the screen title.

Search for the Desired Task:

- From the Task List screen, choose **Search Tasks** from the Goto menu.

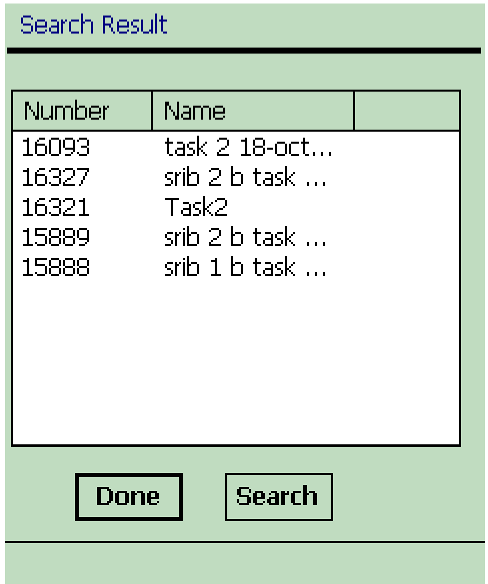
  The Search Tasks screen opens.



- Tap **OK** to view all tasks.

  The Search Results screen opens.

To narrow your search, complete as many fields and drop-down lists as possible and then tap **OK**.



- Select the desired task.

  The Task Number screen opens and displays various information for the selected task, such as customer, customer product, contract, and problem details.

2. To view or add a task note, tap on the note icon in the lower portion of the screen.

   See "Creating and Viewing a Note" on page 3-32 for a complete description of this procedure.

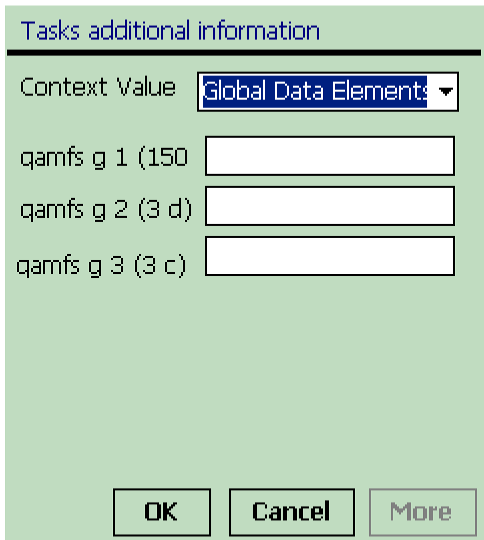
3. To change the task status, open the Status drop-down list and make one of the following selections:

   - 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
   - Interrupted—specify when a task is on hold

- 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 in the lower portion of the screen.

   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, qamfs g 1 (150), qamfs g 2 (3 d), qamfs g 3 (3 c) are the task flexfields.

   > **Note:** Task flexfields are determined at the home office and cannot be changed or created in the field. This includes whether a field is read-only or not.

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

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

6. To access debrief reporting, tap **Debrief**.

The Debrief screen opens. From this screen, you can enter information for the labor, material, and expense reports. See "Debrief Reporting" on page 3-37 for a complete description of this procedure.

7. To view the task service request, tap **SR**.

   The SR 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 3-19 for a complete description of this procedure.

8. To access any counters, tap **Counters**.

   The Counters screen opens. In this screen, you can set and reset counter reading. See "Creating a New Counter Reading" on page 3-64 and "Resetting a Counter Reading" on page 3-66 for a complete description of these procedures.

9. To view any part order status for the task, choose **View Orders** from the Goto menu.

   The View Order screen opens. In this screen, you can view the part order description and status information. See "Viewing Part Orders" on page 3-70 for a complete description of this procedure.

10. To order a part for a task, choose **New Order** from the Goto menu.

    The New Order screen opens with the task number in the Task field. In this screen, you choose the desired part. See "Ordering a Part" on page 3-68 for a complete description of this procedure.

3.5.2 Creating a Task

Steps

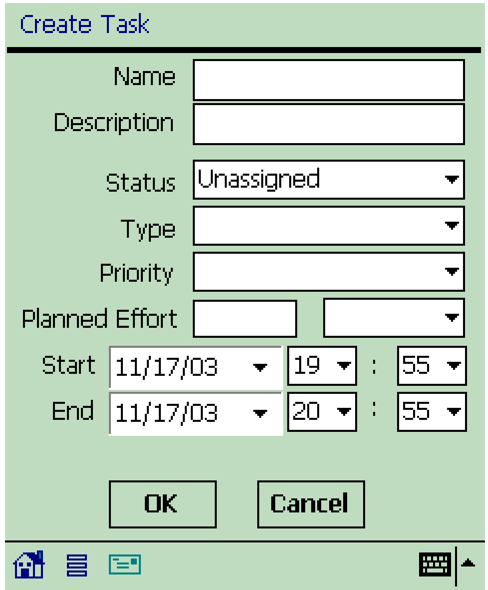
Complete the following steps to create a task:

1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information" on page 3-19 for a complete description of this procedure.

2. Tap **Create Task**.

   The Create Task screen opens.



3. In the Name field, enter the name of the task that you want to create.
4. In the Description field, enter a brief description of the task.
5. From the Status drop-down list, select task status.

   The default selection is `Unassigned`.

   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 Type drop-down list, select the task type.
7. From the Priority drop-down list, select the task priority.
8. 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.
9. To change the task start date, select a new date from the Start drop-down list.

See "Using the Date Drop-down List" on page 3-8 for a complete description of this procedure.

10. To change the task start time, select a new time from the Start hours and minutes drop-down lists.

11. To change the task end date, select a new date from the End drop-down list.

    See "Using the Date Drop-down List" on page 3-8 for a complete description of this procedure.

12. To change the task end time, select a new time from the End hours and minutes drop-down lists.

13. Tap **OK** to save the task and return to the SR screen.

    Tap **Cancel** to return to the SR screen without saving the task. See "Viewing and Changing Service Request Information" on page 3-19 for a complete description of the SR 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 Task List screen. See "Understanding the Task List Screen" on page 3-6 for a complete description of this procedure.

In Oracle Mobile Field Service / Pocket PC, you can view, change, and create 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 Task List screen. See "Working with Your Task List" on page 3-6.

Steps

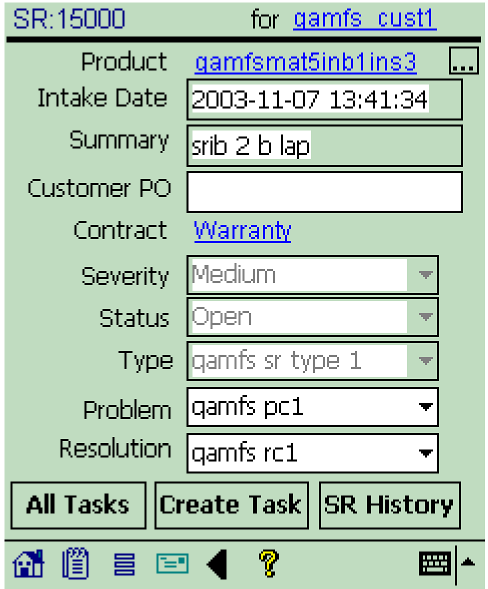
Complete the following steps to view or change service request information:

1. Navigate to the Task List screen and tap on the desired task.

   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **SR**.

   The SR screen opens.



The following table describes the read-only information in the SR screen:

Read-only Information	Description
Service request number	Located in the screen title, this is a generated number for a service request.
For field	The name of the customer. Tap this field open the Customer screen to view additional customer information. See "Viewing Customer Information" on page 3-72 for a complete description of this procedure.
Product field	The name of the customer product that needs service. Tap this field to view additional customer product information. See "Viewing Customer Product Information" on page 3-77 for a complete description of this procedure.
Intake Date field	The date that the service request was created.
Summary field	A brief description of the customer problem.
Contract field	The name of the customer contract. Tap this field to view additional contract information. See "Viewing Contract Information" on page 3-23 for a complete description of this procedure.
Status drop-down list	The current status of the service request.

Read-only Information	Description
Type drop-down list	The type of service request

3. To change the customer product, tap the ellipse (...) button near the Product field.

   The Products screen opens. See "Viewing and Changing a Customer Product for a Task" on page 3-78 for a complete description of this procedure.

4. To add or change customer purchase order information, enter new information in the Cust PO field.

5. To change the service request problem type, open the Problem drop-down list and make the appropriate selection.

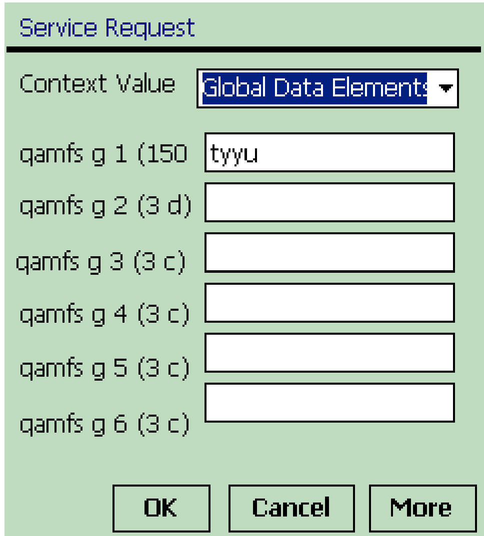
6. To change the service request problem resolution, open the Resolution drop-down list and make the appropriate selection.

7. In the lower portion of the SR screen, tap on the note icon to view or add a service request note.

   See "Creating and Viewing a Note" on page 3-32 for a complete description of this procedure.

8. To view or add information in the service request flexfields, tap on the flexfields icon in the lower portion of the screen.

   The Service Request screen opens.



This graphic is a typical view of the Service Request screen. In this example, Context Value drop-down list, qamfs g 1 (150), qamfs g 2 (3 d), and qamfs g 3 (3 c), qamfs g 4 (3 c), qamfs g 5 (3 c), qamfs g 6 (3 c), are the service request flexfields.

Note: Service request flexfields are determined at the home office and cannot be changed or created in the field. This includes whether a field is read-only or not.

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

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

10. To view all the tasks for the current service request, tap **All Tasks**.

    The All Tasks for SR screen opens. In this screen, you can view all the tasks for the service request. See "Viewing All Tasks for a Service Request" on page 3-25 for a complete description of this procedure.

11. To create a task for the service request, tap **Create Task**.

    The Create Task screen opens. As the screen name implies, this is where you can create a task. See "Creating a Task" on page 3-16 for a complete description of this procedure.

12. To view the service request history, tap **SR History**.

    The SR History screen opens. As the screen name implies, this is where you view the service request history. See "Viewing Service Request History" on page 3-26 for a complete description of this procedure.

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

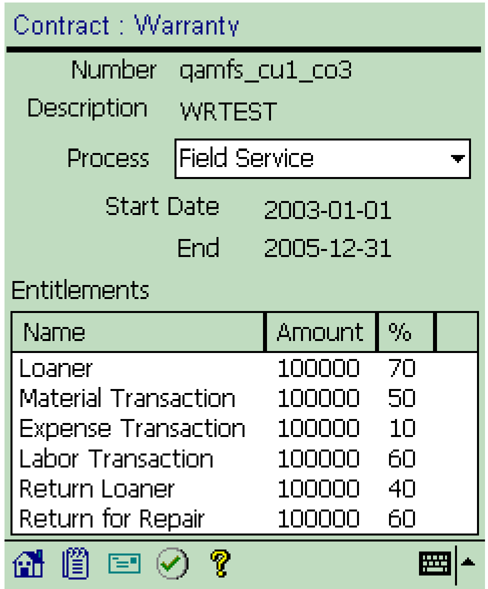
Complete the following steps to view contract information:

1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information" on page 3-19 for a complete description of this procedure.

2. To view any contract information, tap on the underlined, blue contract text.

   The Contract screen opens.



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

Read-only Fields	Description
Number	The number of the contract.
Description	The name of the contract
Start Date	The date the contract begins
End Date	The date the contract ends
Entitlements table	Describes the benefits of the contract, how much monetary coverage is provided for each benefit, and the percentage of coverage for each benefit

3. To change the business process, open the Process drop-down list and make the appropriate selection.
4. Tap the OK icon in the lower portion of the screen to save any change and return to the Tusk Number screen.

3.6.3 Viewing All Tasks for a Service Request

Steps

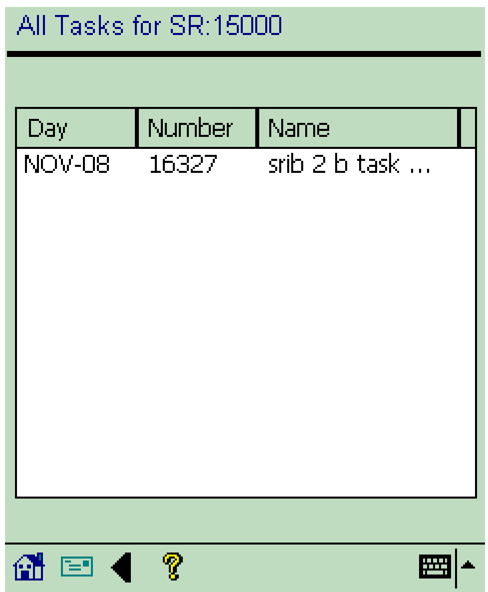
Complete the following steps to view all the tasks associated with a service request:

1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information" on page 3-19 for a complete description of this procedure.

2. Tap **All Tasks**.

   The All Task for SR screen opens.



   This screen contains the service request number as part of the screen title and lists each task for the service request in a table. The table contains the task start date, number, and name.

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

   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

4. Tap the global arrow button in the lower portion of the Task List screen to return to the SR 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 / Pocket PC 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

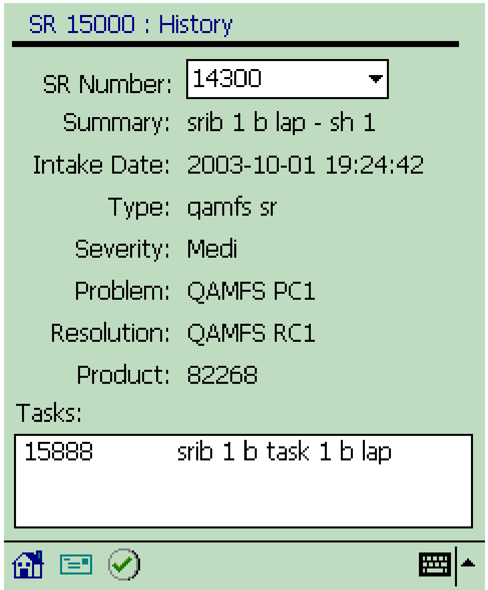
Complete the following steps to view service request history:

1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information" on page 3-19 for a complete description of this procedure.

2. Tap **SR History**.

   The SR History screen opens.

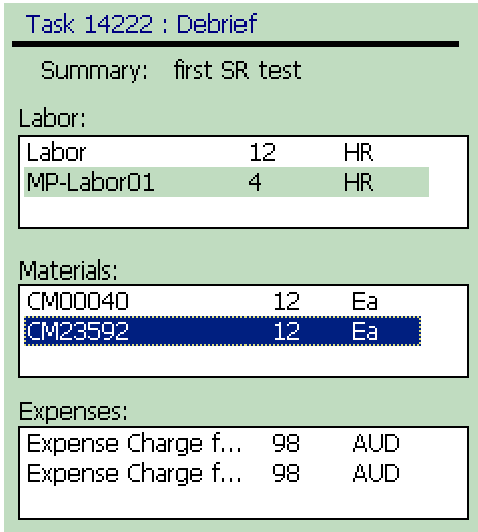


The following table describes the read-only fields of the SR History screen:

Read-only Fields	Description
Summary	A brief description of the service request
Intake Date	The date that the service request was taken
Type	The service request type
Severity	The level of severity of the service request
Problem	The problem to be fixed
Resolution	The state of the service request resolution
Product	The Oracle Mobile Field Service / Pocket PC-generated product code
Tasks table	Task(s) associated with the service request

3. To change the service request number, make the appropriate selection from the SR Number drop-down list.
4. Tap on the task in the Tasks table to learn more about the task.

The Task Debrief screen opens, displaying read-only debrief information about the selected task. For additional details about this screen and how to view reports, see "Debrief Reporting" on page 3-37.



5. In the Task Debrief screen, tap **OK** in the upper right corner near the time.

   Oracle Mobile Field Service / Pocket PC returns you to the SR History 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

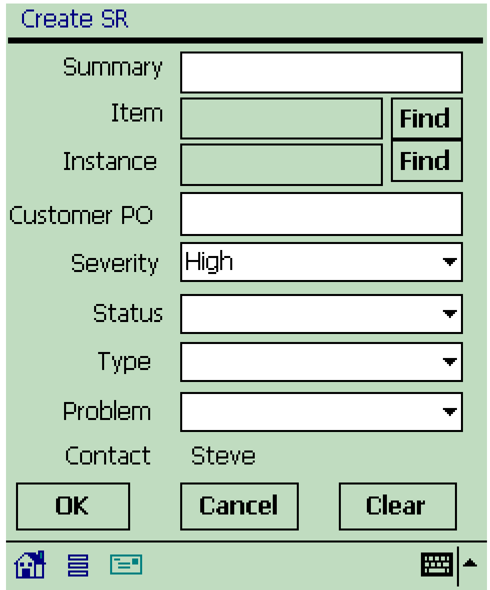
Complete the following steps to create a service request:

1. Navigate to the Customer screen.

   See "Viewing Customer Information" on page 3-72 for a complete description of this procedure.

2. Tap **Create SR**.

The Create SR screen opens.

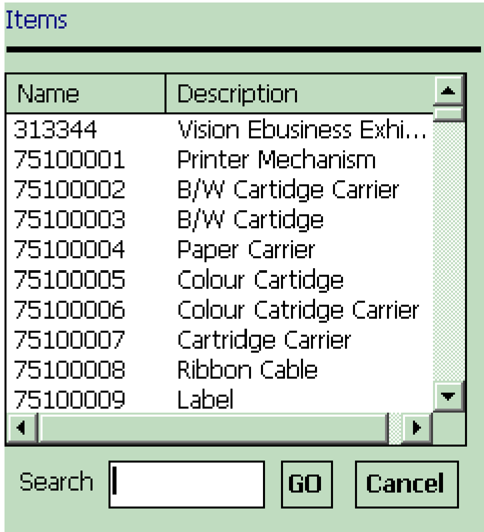


3. In the Summary field, briefly describe the service request.

To specify a serviceable item, you can either complete the Item and Instance fields or simply complete the Instance field. Specifying the Instance field automatically completes the Item field.

4. Tap Find near the Item field to select a serviceable item.

   The Items screen opens with items and their descriptions listed in a table.



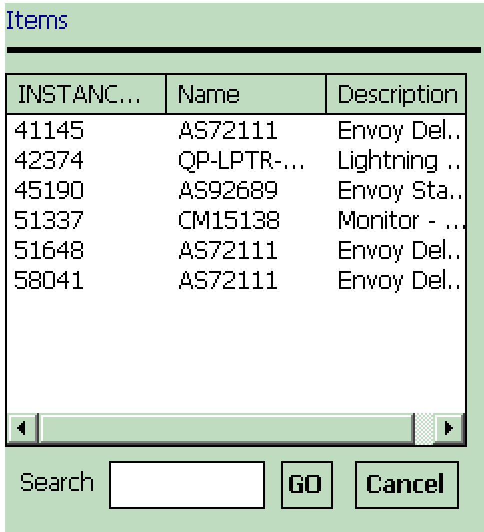
5. Tap the desired item.

   Oracle Mobile Field Service / Pocket PC returns you to the Create SR screen.

   Optionally, you can specify the desired item in the Search field and then tap **Go**.

6. In the Create SR screen, tap **Find** near the Instance field to select a serviceable item of the Item type.

   The Items screen opens with instances, items, and their descriptions listed in a table.



7. Tap the desired item.

   Oracle Mobile Field Service / Pocket PC returns you to the Create SR screen.

   Optionally, you can specify the desired item in the Search field and then tap **Go**.

8. In the Create SR screen, enter the customer purchase order in the Customer PO field.

9. From the Severity drop-down list, select service request severity.

10. From the Status drop-down list, select service request status.

11. From the Type drop-down list, select the service request type.

12. From the Problem drop-down list, select the service request problem.

3.7 Creating and Viewing a Note

You can create notes for various reasons. For example, you may note that a power supply has to be replaced by a refurbished one.

You can create and view notes for the following:

- Service request
- Task
- Customer
- Customer product

Note: Since the creation of all these note types is the same, a common procedure is used to describe all note creation. In this procedure, the phrase `<Note Kind>` is used in the screen names, instead of specific screen names, so as to keep the screen universal.

A note includes the following:

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

To create and view a note for either a service request, task, customer, or customer product requires the same steps, with the only difference in screen names. Therefore, in this section, generic screens are used, but specific instructions are given when necessary.

Steps

Complete the following steps to view or add a note:

1. Navigate to the appropriate screen.
   - For a service request note, navigate to the SR screen.

     See "Viewing and Changing Service Request Information" on page 3-19 for a complete description of this procedure.
   - For a task note, navigate to the Task Number screen.

See "Viewing and Changing Task Information" on page 3-11 for a complete description of this procedure.

- For a customer note, navigate to the Customer screen.

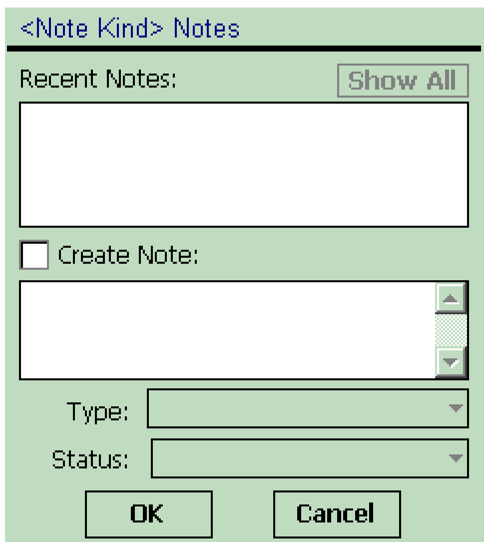
  See "Viewing Customer Product Information" on page 3-77 for a complete description of this procedure.

- For a customer product, navigate to the Customer Product screen.

  See "Viewing Customer Product Information" on page 3-77 for a complete description of this procedure.

2. In the lower portion of the screen, tap on the note icon to view or add a note.

   Depending on the kind of note that you are creating, either the SR Notes, Task Notes, Customer Notes, or Product Notes screen opens.



3. Select the Create Note check box to create a note.

   The cursor appears in the note field and the Type drop-down list becomes active with the `Action` default selection and the Status drop-down list becomes active with the `Public` default selection.

4. Enter the note text in the note field.

5. If you are not satisfied with the default note type, then make the appropriate selection from the Type drop-down list.

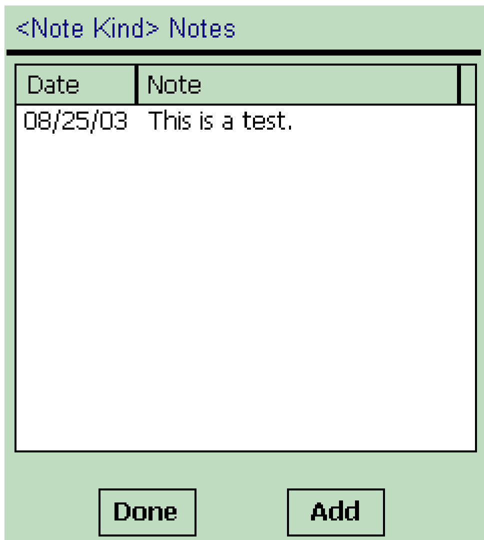
6. If you are not satisfied with the default note status, then make the appropriate selection from the Status drop-down list.

7. Tap **OK**.

   The new note is now listed in the Recent Notes field along with the creation date.

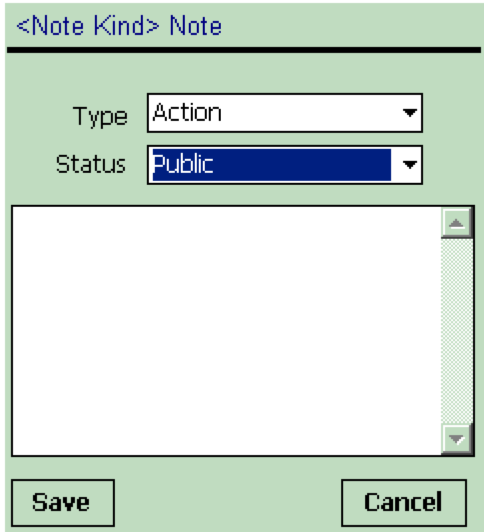
8. To view more of the note text, either tap on the note or tap **Show All**.

   In the first case, the text for the selected note appears in the Create Note field. In the second case, the note text and date for all notes appear in the either the SR Notes, Task Notes, Customer Notes, or Product Notes screen, depending on the kind of note that you are creating.



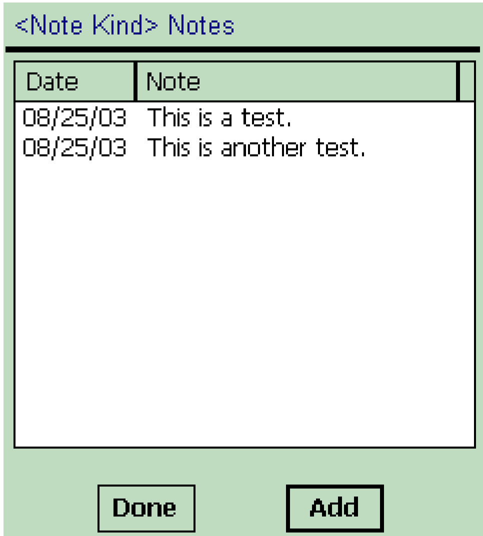
9. To add another note, tap **Add**.

   Depending on the kind of note that you are creating, either the SR Note, Task Note, Customer Note, or Product Note screen opens with the `Action` default selection in the Type drop-down list and the `Public` default selection in the Status drop-down list.



10. If you are not satisfied with the default note type, then make the appropriate selection from the Type drop-down list.
11. If you are not satisfied with the default note status, then make the appropriate selection from the Status drop-down list.
12. Enter the note text in the note field.
13. Tap **Save**.

    The new note appears either in the SR Notes, Task Notes, Customer Notes, or Product Notes screen, depending on the kind of note that you are creating.

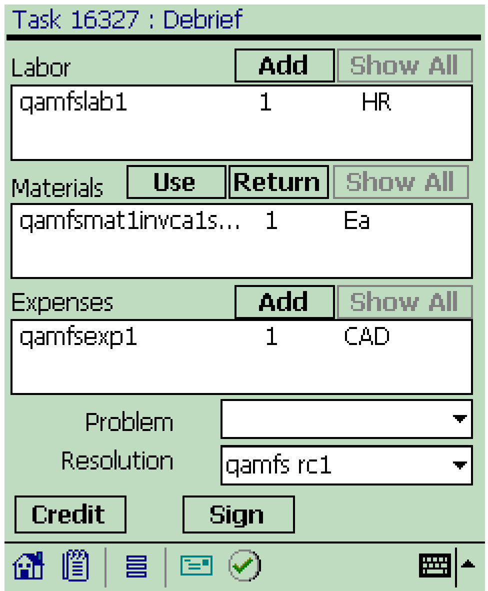


14. Tap **Done** to return to either the SR Notes, Task Notes, Customer Notes, or Product Notes screen, depending on the type of note that you are creating.

    Tap **Add** to add another note.

3.8 Debrief Reporting

The Debrief 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.

In the Debrief screen is where you specify the task problem and resolution. The default problem description is `Electrical Problem` and the default resolution description is `Solution to Software`. Complete the following steps to change this information.

1. To change the default problem description, select the appropriate problem description from the Problem drop-down list,
2. To change the default problem description, select the appropriate resolution description from the Resolution drop-down list.

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 / Pocket PC enables you to add labor report items regardless of the task status.

Steps

Complete the following steps to create a labor report:

1. Navigate to the Task List screen and tap the desired task.

   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

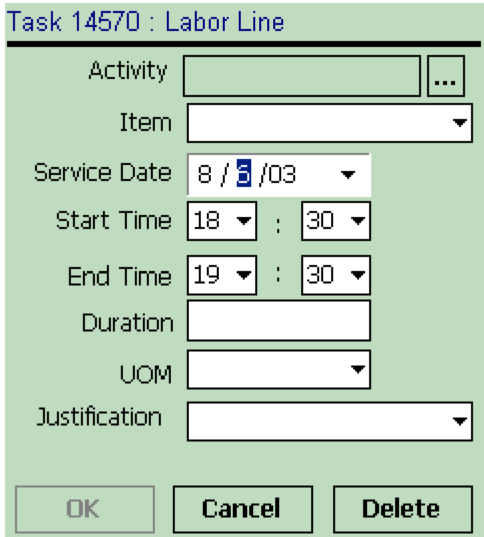
2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-37 for a description of this screen.

3. In the Debrief screen, tap **Add** above the Labor field.

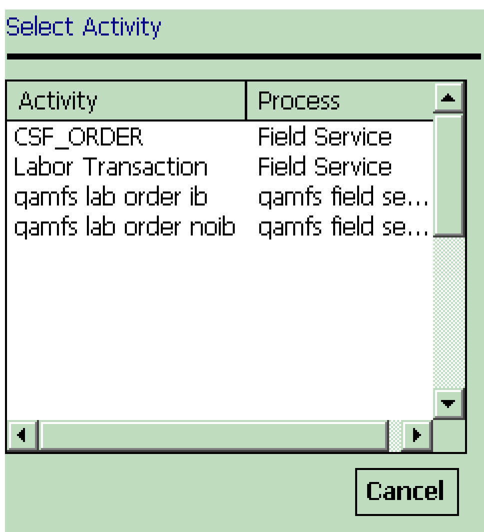
   The Labor Line screen opens with the current date and time in the Service Date drop-down list and the Start Time drop-down lists, respectively. The End Time drop-down list also contains a default value—the start time value plus one hour.

   The Labor Line screen has various drop-down lists where you describe the labor report item.



4. Tap the **Activity** ellipse (...) button to specify the labor activity.

   The Select Activity screen opens with activities and processes listed in a table.



5. Select a labor activity.

The Labor Line screen opens again with the selected activity in the Activity field.

6. From the Item drop-down list, select the labor item.

In the following steps, specify the amount of labor time used to complete the task. Complete *either* steps 7 through 9 *or* steps 10 and 11, according to your business process.

7. If you are not satisfied with the default service date, then make the appropriate selection from the Service Date drop-down list.

   See "Using the Date Drop-down List" on page 3-8 for complete details.

8. If you are not satisfied with the default start time, then select the appropriate hour and minutes from the Start Time drop-down lists.

   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.

9. If you are not satisfied with the default end time, then select the appropriate hour and minutes from the End Time drop-down lists.

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

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

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

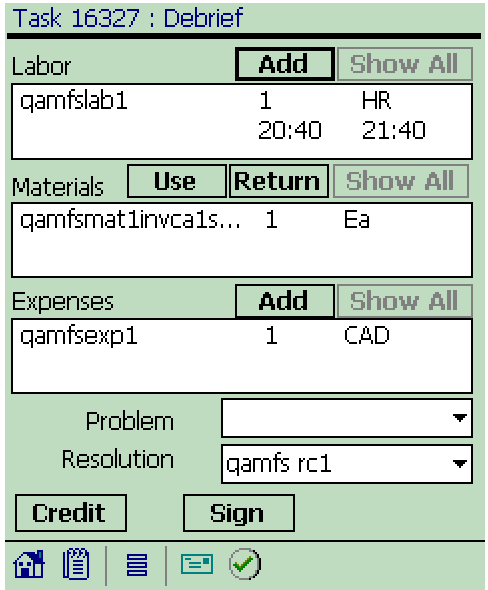
12. From the Justification drop-down list, make a selection that best describes the state of the labor report item.

    It is not mandatory to complete the Justification drop-down list.

13. Tap **OK**.

    The Debrief screen opens. The labor report item along with the start and finish times are listed here.

    Tap **Cancel** to exit the Labor Line screen without saving your work.



3.8.2 Deleting a Labor Report Item

For an open or closed task that has not been synchronized, Oracle Mobile Field Service / Pocket PC 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 3-38.

Steps

Complete the following steps to delete a labor report item:

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

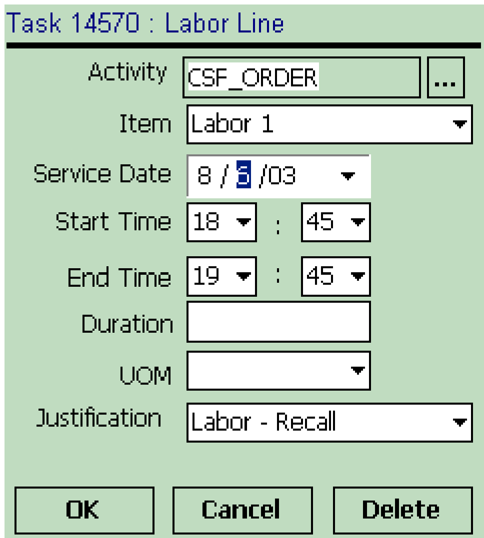
   See "Creating a Labor Report Item" on page 3-38 for a complete description of this procedure.

2. Select the desired labor report item in the Labor field.

   The Labor Line screen opens.

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

The Labor Line screen opens containing the **Delete** button. If Oracle Mobile Field Service / Pocket PC was synchronized after the creation of the desired labor report item, the **Delete** button will be disabled in the Set Labor window.



4. Tap **Delete**.
5. Oracle Mobile Field Service / Pocket PC 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 multiple material reports for a task can be created. 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 / Pocket PC enables you to add material report items regardless of the task status.

When servicing an item, a field service representative may remove or return an old part and then install or use a new replacement part. Oracle Mobile Field Service/Pocket PC provides the functionality in the Debrief screen to describe both of these parts.

3.8.3.1 Creating a Material Report Item for a Replacement Part

Steps

Complete the following steps to create a material report item:

1. Navigate to the Task List screen and tap the desired task.

   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

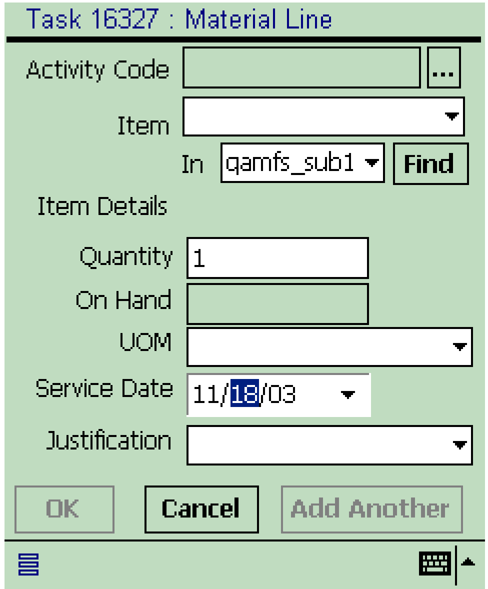
2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-37 for a description of this screen.

3. Tap **Use** above the Materials field.

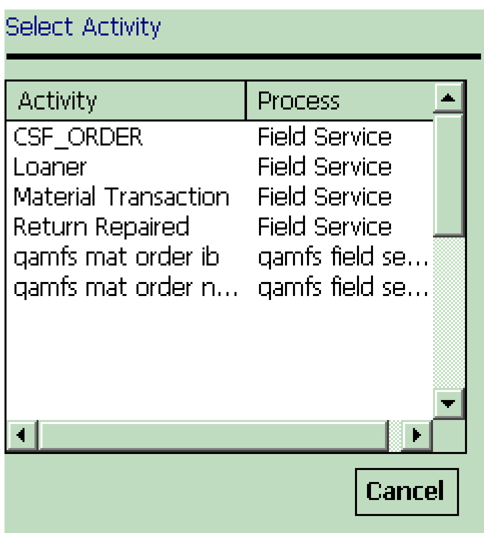
   The Material Line screen opens with a default inventory type in the `In` drop-down list. In this example, `qamfs_sub1` is the default inventory type. Also, the Service Date drop-down list contains a default value—the current date.

   The Material Line screen has various drop-down lists where you describe the material report item.



4. Tap the **Activity Code** ellipse (...) button to specify the material activity.

   The Select Activity screen opens with activities and processes listed in a table.



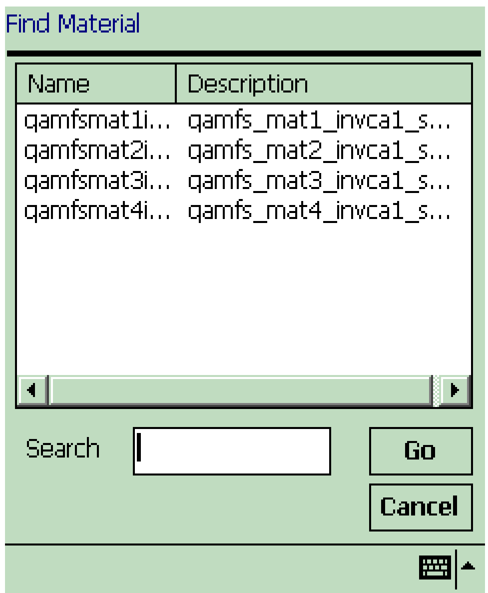
5. Select a material activity.

The Material Line screen opens again with the selected activity in the Activity Code field.

6. Select a material report item using one of the following means:

   - From the Item drop-down list, make the appropriate selection.
   - Tap **Find**.

     The Find Material screen opens with material names and description listed in a table.



     – Select the desired material report item.

       In the Material Line screen, the material report item appears in the Item drop-down list.

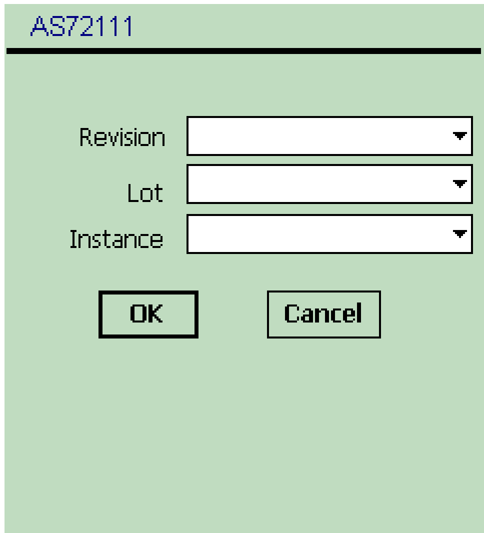
   Regardless of the method that you use to select the material report item, Oracle Mobile Field Service / Pocket PC populates the On Hand field and UOM drop-down list of the Material Line screen.

7. To change the default inventory, make the appropriate selection from the In drop-down list.

8. Specify in the Quantity field the number items needed.

If the item is serialized, then 1 appears in the Quantity field. Change this value if it is not correct.

9. To add revision, lot, and instance information, tap **Item Details**.



10. To change the default unit of measure, make the appropriate selection from the UOM drop-down list.

11. To change the default service date, make the appropriate selection from the Service Date drop-down list.

    See "Using the Date Drop-down List" on page 3-8 for a complete description of this procedure.

12. From the Justification drop-down list, make a selection that best describes the state of the material report item.

    It is not mandatory to complete the Justification drop-down list.

13. Tap **OK**.

    The new material report item now appears in the Materials field of the Debrief screen.

    Tap **Cancel** to exit the Material Line screen without saving your work. Tap **Add Another** to save your work and create another material report item.

3.8.3.2 Creating a Material Report Item for a Removed Part

Steps

Complete the following steps to create a material report item:

1. Navigate to the Task List screen and tap the desired task.

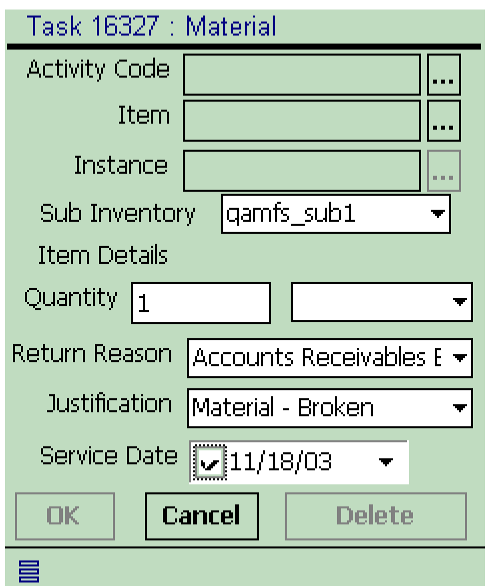
   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-37 for a description of this screen.

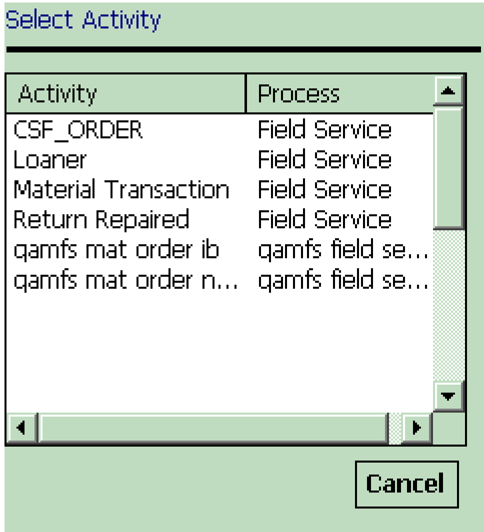
3. Tap **Return** above the Materials field.

   The Material screen opens with a default inventory type in the Sub Inventory drop-down list. There is also default information in the Return Reason, Justification, and Service Date drop-down lists. The latter of these contains the current date.



4. Tap the **Activity Code** ellipse (...) button to specify the material activity.

   The Select Activity screen opens with activities and processes listed in a table.

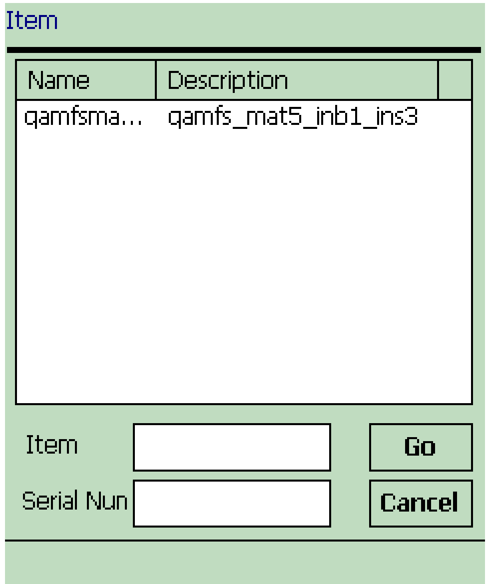


5. Select a material activity.

   The Material screen opens again with the selected activity in the Activity Code field.

6. Tap **Item** ellipse (...) button to select a material report item.

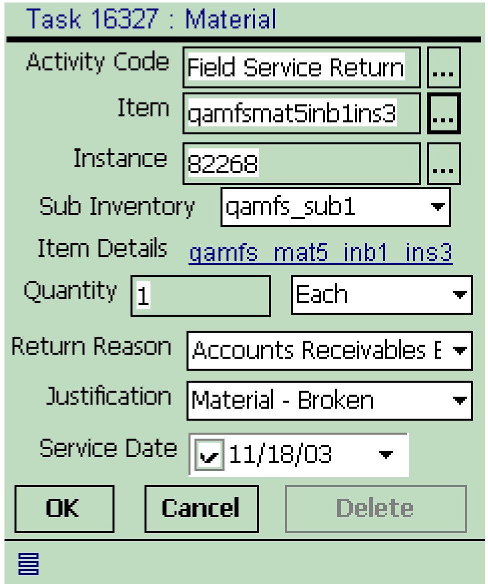
   The Item screen opens with the name and description of each material report item listed in a table.



7. Select the desired material report item.

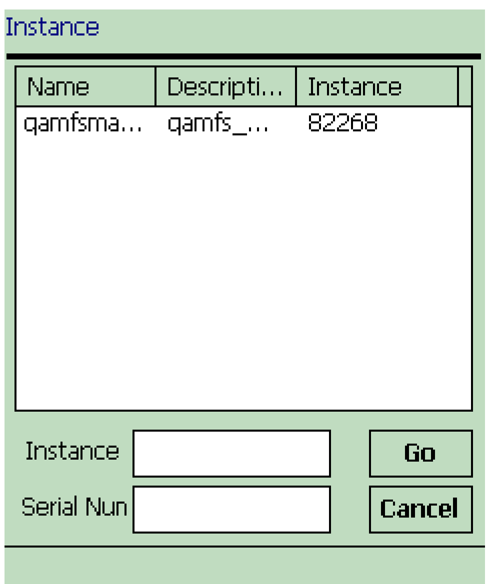
   If there are several material report items listed in the Item screen, you can access the desired material report item directly by specifying information in the Item field or Serial Num field. Then click **Go**.

   In the Material screen, the material report item appears in the Item field. Oracle Mobile Field Service / Pocket PC populates the Instance field with a default value and places a unit of measure in the drop-down list near the Quantity field. The application also places a hyperlink in the Item Details field.



8. To change the default instance value, tap the **Instance** ellipse (...) button.

   The Instance screen opens.



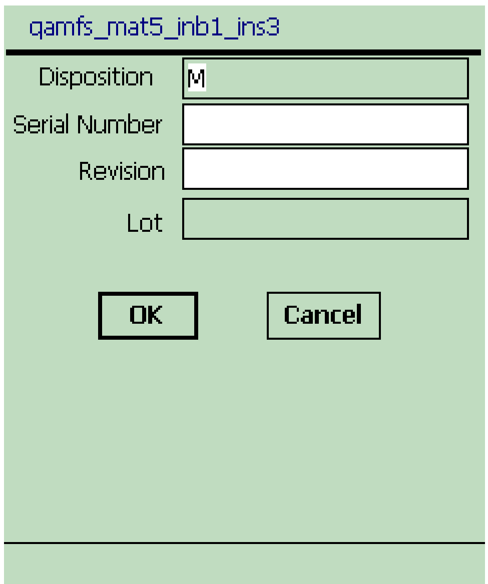
9. Select the appropriate item instance.

   The selected instance appears in the Instance field of the Material screen.

   If there are several instances listed in the Instance screen, you can access the desired instance directly by specifying information in the Instance field or Serial Num field. Then click **Go**.

10. To view or add item details, tap **Item Details**.

    The Item Details screen opens with default information in the Disposition field.



11. In the Serial Number field and Revision field, specify the appropriate information and then tap **OK**.

12. In the Material screen, specify in the Quantity field the number items needed.

    If the item is serialized, then 1 appears in the Quantity field. Change this value if it is not correct.

13. To change any default information in the Material screen, make the desired selection from appropriate drop-down list.

14. Tap **OK**.

    The new material report item now appears in the Materials field of the Debrief screen.

Tap **Cancel** to exit the Material Line screen without saving your work. Tap **Add Another** to save your work and create another material report item.

3.8.4 Deleting a Material Report Item

For an open or closed task that has not been synchronized, Oracle Mobile Field Service/Pocket PC 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 3-42.

Steps

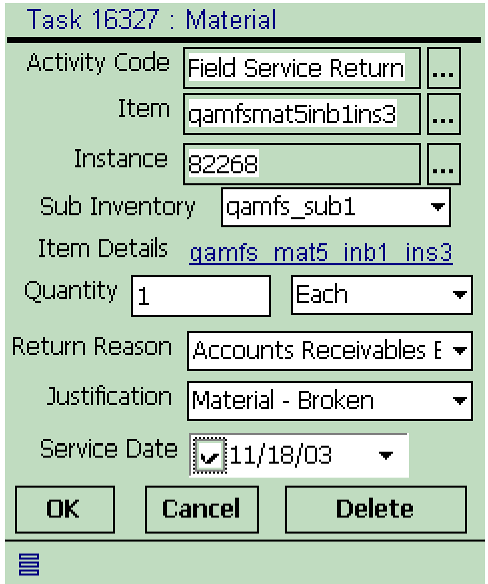
Complete the following steps to delete a material report item:

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

   See "Creating a Material Report Item" on page 3-42 for a complete description of of this procedure.

2. Tap the desired material report item in the Material field.

   The Material Line screen opens containing the **Delete** button.



If Oracle Mobile Field Service / Pocket PC is synchronized after the creation of the desired material report item, then the **Delete** button is disabled in the Material Line screen or Material screen.

3. Tap **Delete**.

   Oracle Mobile Field Service / Pocket PC returns you to the Debrief screen 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 / Pocket PC enables you to add expense report items regardless of the task status.

Steps

Complete the following steps to create an expense report:

1. Navigate to the Task List screen and tap the desired task.

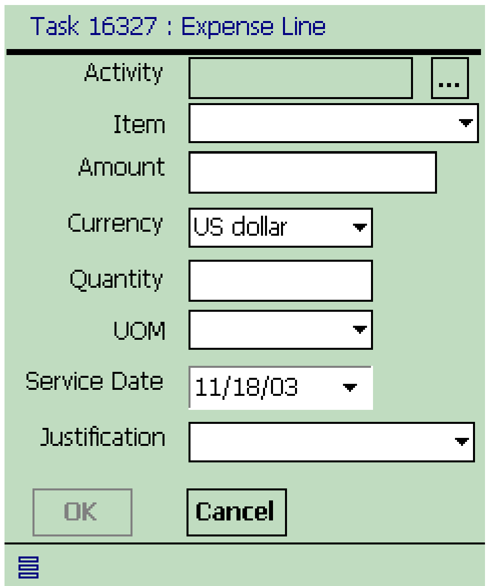
   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-37 for a description of this screen.

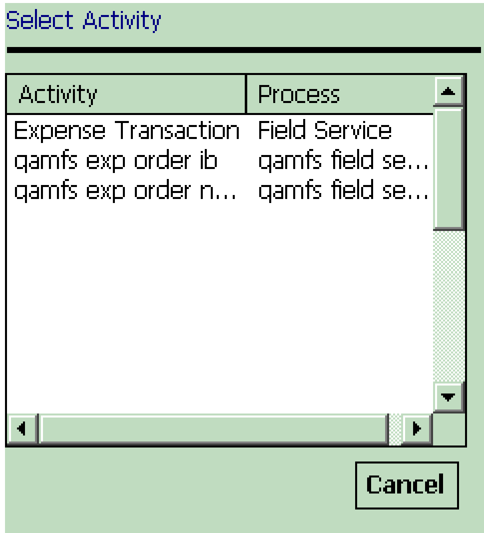
3. Tap **Add** above the Expenses field.

   The Expense Line window opens with current date in the Service Date field.



4. Tap the **Activity** ellipse (...) button.

   The Select Activity screen opens with expense activities and processes listed in a table.



5. Select an expense activity.

   The Expense Line screen opens again with the selected activity in the Activity field. Based on your activity selection, Oracle Mobile Field Service / Pocket PC automatically populates the Item drop-down list.

6. If you are not satisfied with the selection in the Item drop-down list, then change this selection.

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.
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. If you are not satisfied with the date in the Service Date drop-down list, then change this selection.
12. From the Justification drop-down list, make a selection that best describes the state of the expense report item.

It is not mandatory to complete the Justification drop-down list.

13. Tap **OK**.

    The new expense report item now appears in the Expenses field of the Debrief screen.

    Tap **Cancel** to exit the Expense Line screen without saving your work.

3.8.6 Deleting an Expense Report Item

For an open or closed task that has not been synchronized, Oracle Mobile Field Service / Pocket PC 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 3-53.

Steps

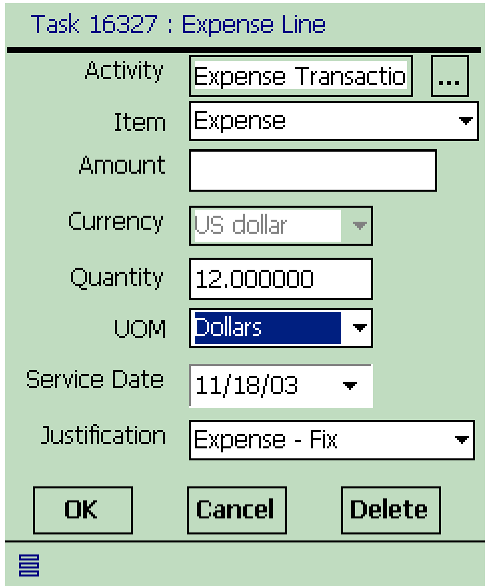
Complete the following steps to delete a expense report item:

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

   See "Creating a Material Report Item" on page 3-42 for a complete description of of this procedure.

2. Tap the desired expense report item in the Expense field.

   The Expense Line screen opens containing the **Delete** button.



If Oracle Mobile Field Service / Pocket PC is synchronized after the creation of the desired expense report item, then the **Delete** button will not be present in the Expense Line screen.

3. Tap **Delete**.

   Oracle Mobile Field Service / Pocket PC returns you to the Debrief screen where the desired expense report item is no longer present.

3.9 Obtaining an Electronic Signature

Oracle Mobile Field Service / Pocket PC enables you to obtain a customer's electronic signature for task sign off. 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 Task List screen and tap the desired task.

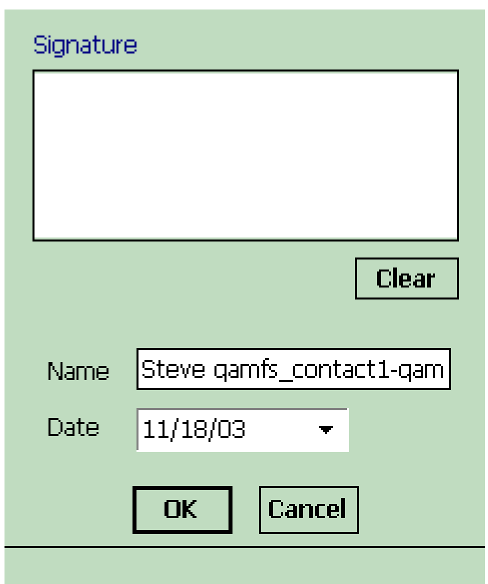
   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-37 for a description of this screen.

3. Tap **Sign**.

   The Signature screen opens with customer name in the Name field and the current date in the Date drop-down list.



4. Have the customer use the Pocket PC stylus to sign in the Signature field.

To clear a customer’s signature, tap **Clear**.

5. In the Name field, enter the customer name.
6. If you are not satisfied with the default date in the Date drop-down list, then change this selection.

   See "Using the Date Drop-down List" on page 3-8 for a complete description of this procedure.
7. Tap **OK**.

   Oracle Mobile Field Service / Pocket PC returns to the Report screen.

   Tap **Cancel** to exit the Signature screen without saving a signature.

3.10 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 / Pocket PC 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.

3.10.1 Recording Credit Card Information

Steps

Complete the following steps to record or update credit card information:

1. Navigate to the Task List screen and tap the desired task.

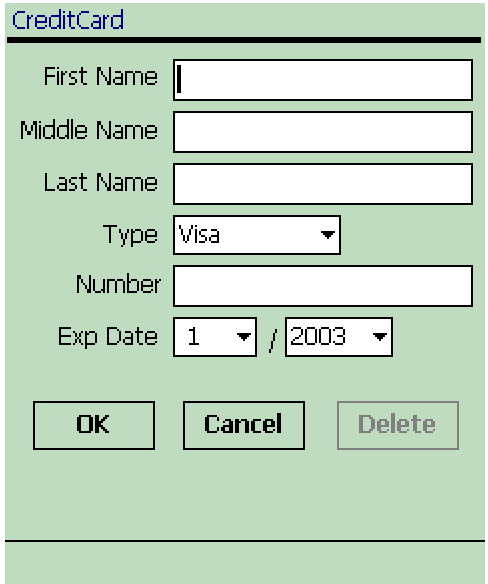
   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-37 for a description of this screen.

3. Tap **Credit**.

   The Credit Card screen opens with an expiration date in the Exp Date drop-down lists.



4. Complete the First Name, Middle Name, and Last Name fields with the appropriate customer information.
5. If you are note satisfied with the default credit card type, then make the appropriate selection from the Type drop-down list.
6. In the Number field, enter the customer's credit card number.

   Oracle Mobile Field Service / Pocket PC 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.
7. If you are note satisfied with the default expiration date, then make the appropriate selection from the Exp Date drop-down lists.
8. Tap **OK**.

   Oracle Mobile Field Service / Pocket PC returns you to the Debrief screen.

   Tap **Cancel** to return to the Debrief screen without saving any credit card information.

3.10.2 Deleting Credit Card Information

For credit card information that has not been synchronized, Oracle Mobile Field Service / Pocket PC enables you to delete this information for a task.

Prerequisite

- Unsynchronized credit card information has been created for a task. See "Recording Credit Card Information" on page 3-60.

Steps

Complete the following steps to delete credit card information:

1. Navigate to the Task List screen and tap the desired task.

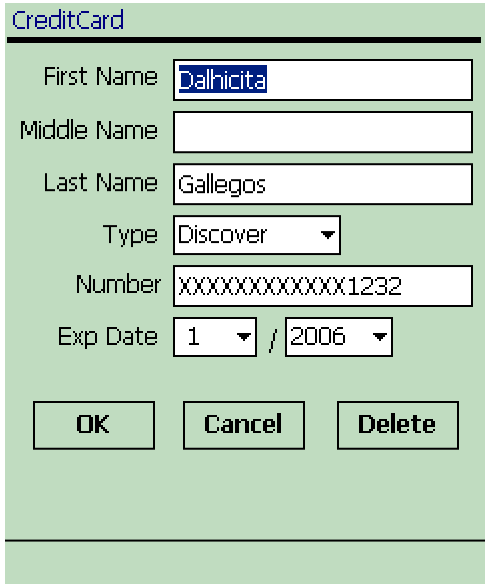
   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-37 for a description of this screen.

3. Tap **Credit**.

   The Credit Card screen opens with information describing the customer's credit card. To ensure security, all but the last four digits of the card are X'ed out in the Number field.



4. Tap **Delete**.

   Oracle Mobile Field Service / Pocket PC clears all the fields of the Credit Card screen, except the Type drop-down list and the Exp Date drop-down lists.

3.11 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

Steps

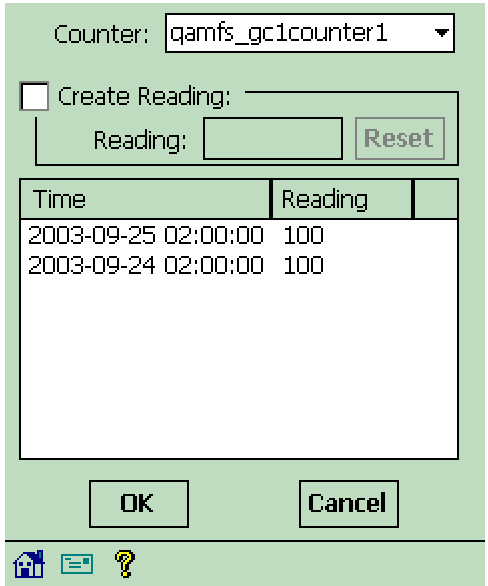
Complete the following steps to set a counter reading:

1. Navigate to the Task List screen and tap the desired task.

   The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Counters**.

   The Counters screen opens with the `Number of units` default selection in the Counter drop-down list.



3. If you are not satisfied with counter default selection, then make the appropriate selection from the Counter drop-down list.

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

4. Select the Create Reading check box.

   The Reading field and **Reset** button become enabled.

5. In the Reading field, enter the counter value and then tap **OK**.

   The counter reading appears in the table.

   For a description of the reset counter procedure, see "Resetting a Counter Reading" on page 3-66.

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 Resetting a Counter Reading

Steps

Complete the following steps to reset a counter reading:

1. Navigate to the Counters screen.

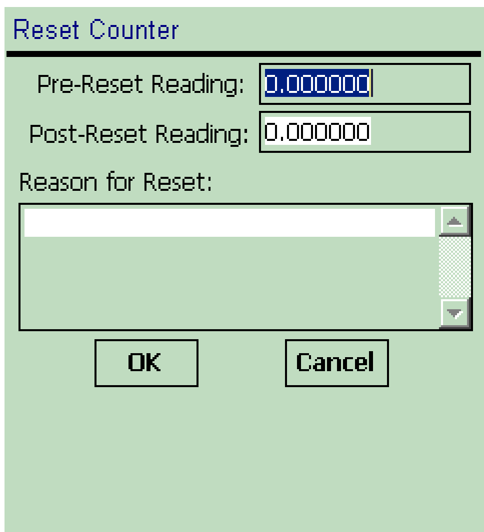
   See "Creating a New Counter Reading" on page 3-64.

2. Select the desired counter reading from the table.

   The selected counter reading appears in the Reading field.

3. Tap **Reset**.

   The Reset Counter window opens.



4. In the Pre-Reset Reading field, enter the original counter reading.
5. In the Post-Reset Reading field, enter a value to reset the counter reading.
6. Optionally, enter in the Reason for Reset field a statement describing your reason for resetting 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.

---

7. Tap **OK**.

Oracle Mobile Field Service / Pocket PC returns you to the Counters screen where the new counter reading appears in the table.

3.12 Spare Parts Management

Spare parts management includes ordering parts and viewing part orders.

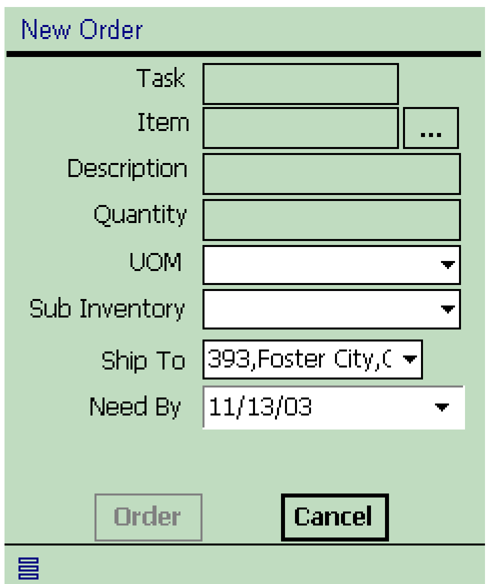
3.12.1 Ordering a Part

Steps

Complete the following steps to order a part:

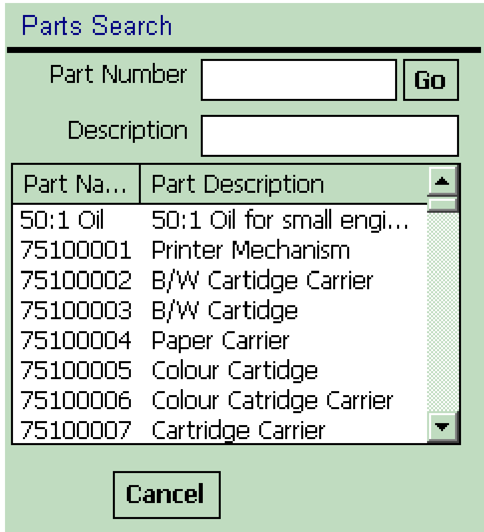
1. From the Task List screen, select **Create Parts Order** from the Goto menu.

   The New Order screen opens with a default address in the Ship To field and the current date in the Need By field.

2. Tap on the **Item** ellipse (...) button.

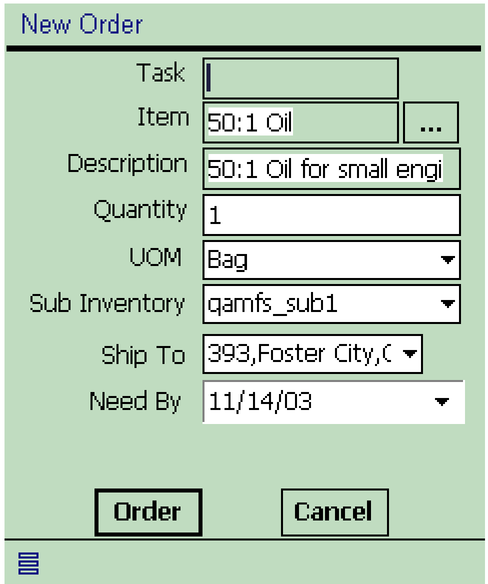
   The Parts Search window opens.



3. Select the desired part from the table.

If you know enough information about the desired part, you can specify this in the Part Number field or Description field and then make your selection from the table.

The selected part appears in the New Order screen.



4. Tap **Order**.

   A message appears stating the requirement number and prompting you to continue. Remember this part number in order to reference the part order status.

5. Tap **OK** in the prompt.

   The selected part is added to the part order. Oracle Mobile Field Service / Pocket PC enables you to check the status of this order. See "Viewing Part Orders" on page 3-70 for a complete description of this procedure.

3.12.2 Viewing Part Orders

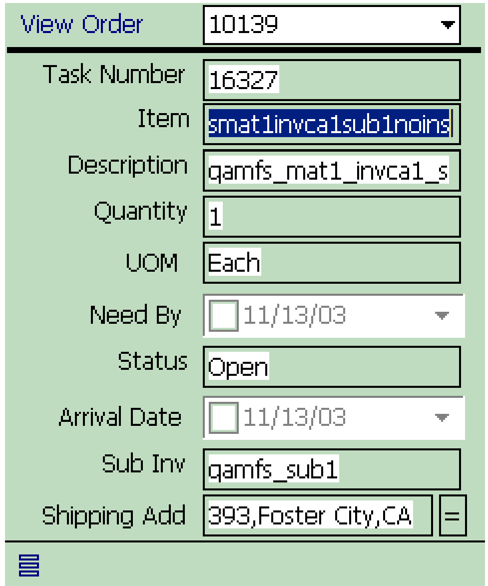
After a part has been ordered, you can view part orders to see what parts have been ordered.

Steps

Complete the following steps to view a part order:

1. From the Task List screen, select **View Order Status** from the Goto menu.

   The View Order screen opens.



2. To change the requirement number, make the proper selection from the View Order drop-down list.
3. To see the full shipping address, tap the equal sign (=) button.

   The Address screen opens.
4. Tap **Done** to close the Address screen.
5. Tap **OK** to close the View Order screen.

3.13 Viewing Customer Information

You can view the following customer information in the Customer screen:

- Name
- Contact
- Address
- Phone number

There are two ways to open the Customer screen: From within a task or with no task open.

Steps

Complete the following steps to view customer information:

1. Open the Customer screen.

   To Open the Customer Screen from within a Task:

   - From the Task List screen, tap the desired task.

     The Task Number screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

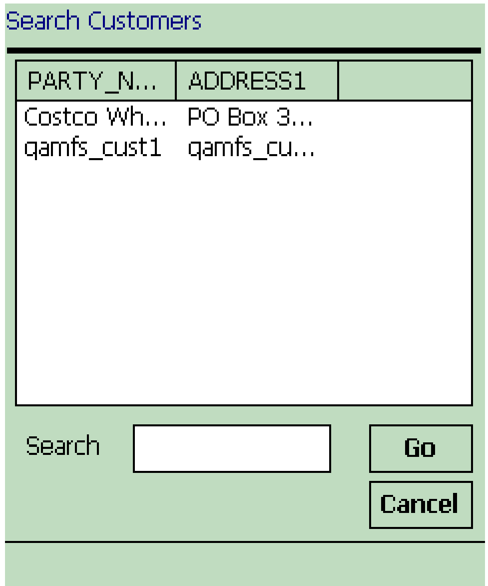
   - Tap the Customer field.

     The Customer screen opens with the customer name in the screen title. In this example, Business World is the customer and therefore this name is in the screen title.

To Open the Customer Screen with no Task Open:

- From the Goto menu at the bottom of the Task List screen, select **Search Customers**.

  The Search Customers screen opens. For each customer, this screen displays the customer name and address.

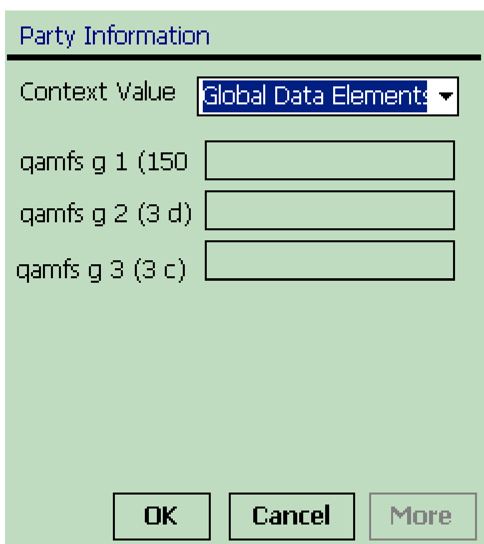


- Tap the desired customer.

  The Customer screen opens with the customer name appearing in the screen title.

2. To view or add information in the customer flexfields, tap on the flexfields icon in the lower portion of the screen.

   The Party Information screen opens.



This graphic is a typical view of the Party Information screen. In this example, Context Value drop-down list, qamfs g 1 (150), qamfs g 2 (3 d), and qamfs g 3 (3 c) are the customer flexfields.

Note: Customer flexfields are determined at the enterprise server level and cannot be changed or created in the field. This includes whether a field is read-only or not.

---

3. Tap **OK**.

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

   Tap **More** to view any additional information in the Party Information screen.

   Tap **Cancel** to return to the Customer screen without saving any data entry.

4. In the lower portion of the Customer screen, tap on the note icon to view or add a customer note.

   See "Creating and Viewing a Note" on page 3-32 for a complete description of this procedure.

5. To view all customer products, tap **Products**.

   The All Products screen opens. In this screen, you can search for a customer product and then receive details about this product. See "Viewing Customer Product Information" on page 3-77 for a complete description of this procedure.

6. To view all service requests for a customer, tap **All SRs**.

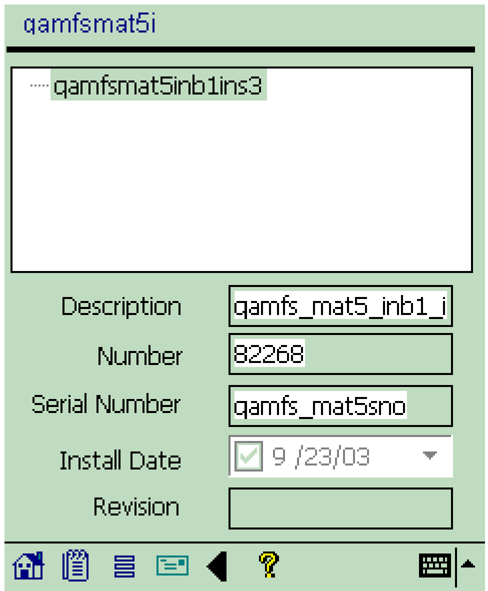
   The All SRs screen opens. In this screen, you can view all the service requests for a customer. See "Viewing All Tasks for a Service Request" on page 3-25 for a complete description of this procedure.

7. To create a service request, tap **Create SR**.

   The Create SR screen opens. In this screen, you create a service request by specifying various information. See "Creating a Service Request" on page 3-28 for a complete description of this procedure.

3.14 Viewing Customer Product Information

Oracle Mobile Field Service / Pocket PC enables you to view the customer product for a task or all the products for a customer. The customer product details are described in the Customer Product screen.



The following table describes the read-only information in the Customer Product screen:

Read-only Fields	Description
Part number	The part number for the customer product, located in the screen title.
Part hierarchy	This field lists any "parent-child" relationships the customer product may have to any other parts.
Description	Describes the customer product.
Number	The customer product number, generated by Oracle Mobile Field Service / Pocket PC.
Serial Number	The serial number of the customer product.
Install Date drop down list	The date the customer product was installed.

Read-only Fields	Description *(Cont.)*
Revision	

3.14.1 Viewing and Changing a Customer Product for a Task

Steps

Complete the following steps to view customer product information:

1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information" on page 3-19 for a complete description of this procedure.

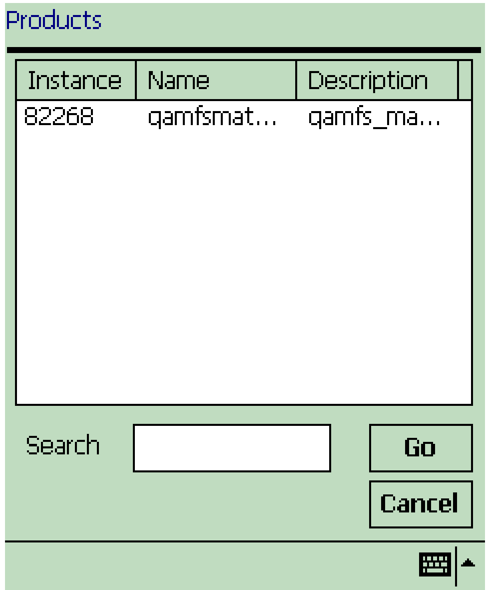
2. Tap the Product field to view the customer product information.

   The Customer Product screen opens, displaying a product description, number and serial number along with the installation date and any revision information.

3. Tap the left arrow icon to return to the SR screen.

4. To change the customer product, tap the ellipse (...) button near the Product field.

   The Products screen opens. This screen lists in a table all the possible customer's products, with the instance, name, and description provided.



5. Tap the desired customer product.

   The selected customer product appears in the Product field of the SR screen.

3.14.2 Viewing All the Products for a Customer

Steps

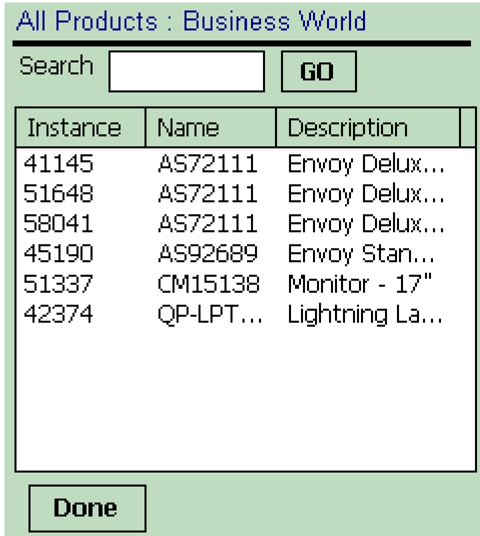
Complete the following steps to view customer product information:

1. Navigate to the Customer screen.

   See "Viewing Customer Information" on page 3-72 for a complete description of this procedure.

2. Tap **Products**.

   The All Products screen opens displaying in a table the customer product instance, name, and description.



3. Select the desired customer product.

   The Customer Product screen opens, displaying a product description, number and serial number along with the installation date and any revision information.

4. Tap **Done** to return to the All Products screen.

3.15 Messaging

This section describes how you can use messaging in the Oracle Mobile Field Service/Pocket PC 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:

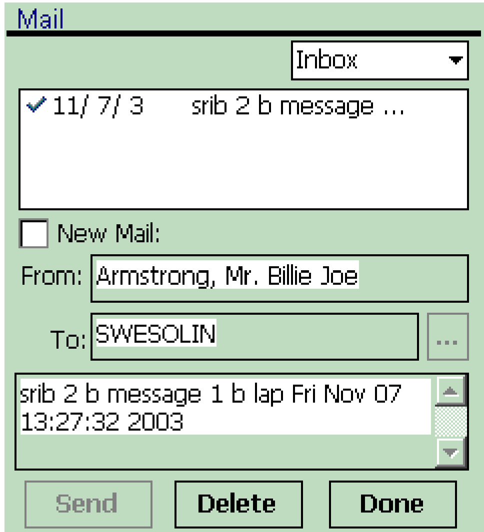
- Read messages that you have received
- Send messages to other members of the field service organization
- Delete messages that you have read

Steps

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

1. Tap the mailbox icon at the bottom of the Task List screen.

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



2. Select the message that you want to read.

   The message text appears in the scrollable box near the bottom of the Mail screen (Inbox view).

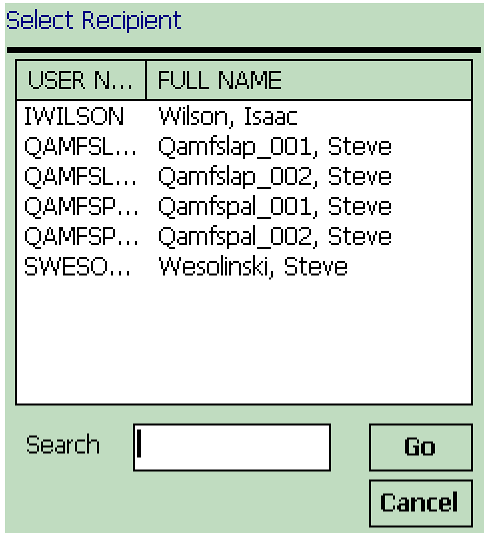
3. To delete this message, tap **Delete**.

4. To create a new message, select the New Mail check box.

   The user name appears in the From field.

5. Tap the **To** ellipse (...) button to select a recipient.

   The Select Recipient screen opens with the user name and full name of all the possible mail recipients listed in a table.



6. Select the recipient from the table.

   The recipient appears in the To field of the Mail screen (Inbox view).

7. Type your message in the scrollable box near the bottom of the screen and then tap **Send**.

   The message is sent to the recipient.

8. To view the messages that you sent, select **Outbox** from the drop-down list.

   The Mail screen (Outbox view) displays all sent messages.

9. Select the message for which you want to view the text.

10. The message text appears box near the bottom of the screen.

11. To create and send a new message in the Mail screen (Outbox view), complete the steps in this procedure you used to create a new message in the Mail screen (Inbox view).

12. Tap **Done** to return to the Task List screen.

3.16 Synchronizing with the Enterprise System

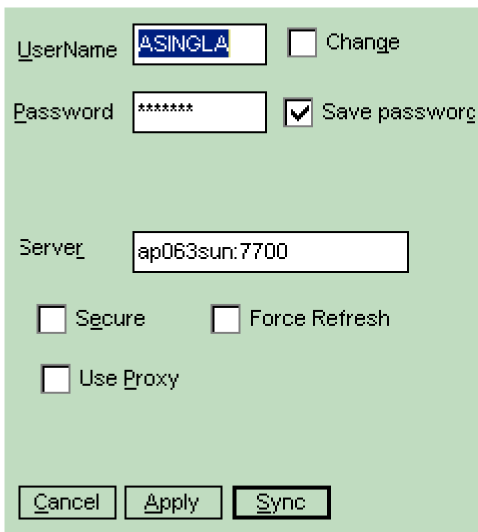
In order to receive new data assigned to you, such as new tasks and service requests, you need to synchronize with the enterprise system. Likewise, to send the changes that you have made, such as creating report items and updating task statuses, you need to synchronize with the enterprise system.

Steps

Complete the steps below to synchronize Oracle Mobile Field Service / Pocket PC with the enterprise system.

1. Establish a network connection for your Pocket PC.
2. Tap the synchronization icon near the bottom of the Task List screen.

   The synchronization screen opens.



3. Complete the following fields and check boxes in the synchronization screen as described in the following tables:

Field	Description
User Name	mSync client user name. (This is the Mobile Field Service user name.)
Password	mSync client password. This field is case sensitive.

Field	Description
Server	IPaddress:port

Check box	Description
Change	Leave un-selected.
Save password	Select this check box to save the mSync user name and password.
Secure	
Use Proxy	Select if appropriate.
Force Refresh	

4. Tap **Sync**.

Information from your Pocket PC and enterprise system synchronize.

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 **Apply** to save your work without synchronizing. Tap **Cancel** to exit the synchronization screen without saving your work.

3.17 Closing the Application

When you have finished working in Oracle Mobile Field Service / Pocket PC, 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 / Pocket PC:

- In the lower portion of the Task List screen, choose Exit from the Exit drop-down list.

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

4

General Operating Rules

This chapter describes some general operating rules of Oracle Mobile Field Service/Pocket PC 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/Pocket PC:

- 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 Task List Screen" on page 3-6 for a complete description of the task status flags.
- You cannot delete report items after they are synchronized.
- If several working tasks are synchronized to the Pocket PC 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 / Pocket PC application in several different ways, depending on how much control a field service representative is given over his schedule. This appendix 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. Take, for example, the following tasks:

- 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 a task, but he 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 task lists of all three representatives. It now appears on their task list.

However, if one of your field service representatives changes the time for his task, that would affect the task list 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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