

# **Oracle® Mobile Field Service**

Implementation Guide

Release 11i (11.5.9)

**Part No. B12005-03**

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Use this guide to implement either Oracle Mobile Field Service/Laptop, Oracle Mobile Field Service/Palm, or Oracle Mobile Field Service/Pocket PC.

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

Part No. B12005-03

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# Contents

<b>Send Us Your Comments</b> .....	ix
<b>Preface</b> .....	xi
Intended Audience .....	xi
Documentation Accessibility .....	xi
Related Documents.....	xii
<b>1 Introduction</b>	
1.1 Overview of Oracle Field Service.....	1-2
1.2 Overview of Oracle Mobile Field Service .....	1-4
1.2.1 Oracle Mobile Field Service Applications Compared .....	1-5
1.2.2 Oracle Mobile Field Service Key Features Described .....	1-7
1.3 Migration .....	1-11
<b>2 Software and Hardware Requirements</b>	
2.1 Minimum Software Requirements.....	2-1
2.1.1 Enterprise Server .....	2-1
2.1.2 Laptop Client .....	2-1
2.1.3 Palm Client.....	2-1
2.1.4 Pocket PC Client.....	2-2
2.2 Minimum Hardware Requirements .....	2-3
2.2.1 Enterprise Server .....	2-3
2.2.2 Laptop Client .....	2-3
2.2.3 Palm Client.....	2-3

2.2.4	Pocket PC Client .....	2-4
2.3	Oracle Mobile Field Service Installation Dependencies.....	2-4

### 3 Implementation

3.1	Implementing the Mobile Application Foundation .....	3-2
3.2	Installing the Mobile Application Patches .....	3-2
3.3	Confirming Required Enterprise Setups .....	3-3
3.3.1	Setting Up Service Requests .....	3-3
3.3.2	Setting Up Tasks.....	3-4
3.3.3	Setting Up Oracle Field Service Report.....	3-4
3.3.4	Setting Up Install Base .....	3-5
3.3.5	Setting Up Counters.....	3-5
3.3.6	Setting Up Messaging.....	3-6
3.4	Setting Profile Options for Oracle Mobile Field Service .....	3-7
3.4.1	Setting up Profile Options for Oracle Mobile Field Service/Laptop.....	3-7
3.4.2	Setting up Profile Options for Oracle Mobile Field Service/Palm .....	3-13
3.4.3	Setting up Profile Options for Oracle Mobile Field Service/Pocket PC.....	3-15
3.5	Scheduling Concurrent Programs.....	3-19
3.6	Creating and Managing Mobile Users .....	3-20
3.7	Testing the Mobile Application Implementation.....	3-21
3.7.1	Running the Test.....	3-21
3.7.2	Final Checks .....	3-22

### 4 Administrating and Troubleshooting

4.1	Setting the Conflict Resolution Rule .....	4-1
4.2	Reviewing Upload Errors.....	4-1
4.3	Running Diagnostic Tests.....	4-2
4.3.1	Testing Mobile Application Foundation.....	4-2
4.3.2	Testing Mobile Applications.....	4-2
4.4	Configuring Logging.....	4-7
4.5	Common Issues.....	4-8
4.5.1	Viewing Items Stocked in a Subinventory.....	4-8

## **A Installing Oracle Mobile Field Service/Laptop**

A.1	Installing the Application on Your Laptop Computer .....	A-1
A.2	Starting Oracle Mobile Field Service/Laptop .....	A-7

## **B Installing Oracle Mobile Field Service/Palm**

B.1	Installing the Application on Your Palm Handheld .....	B-1
B.1.1	Step 1: Downloading and Installing the Oracle9i Lite Setup Program .....	B-2
B.1.2	Step 2: Performing a HotSync to put Oracle9i Lite Components, Oracle Mobile Field Service, and the Database on the Palm Handheld .....	B-3
B.1.3	Step 3: Establishing an Oracle Conduit on the Palm HotSync Manager .....	B-3
B.1.4	Step 4: Configuring mSync on the Palm Handheld .....	B-3
B.1.5	Step 5: Performing a Full Synchronization to Retrieve Oracle Mobile Field Service and Data .....	B-5
B.1.6	Step 6: Launching Oracle Mobile Field Service/Palm.....	B-5
B.2	Configuring the Palm Handheld for RAS or a Modem.....	B-6
B.2.1	Connecting to a RAS Client .....	B-6
B.2.2	Connecting to a Wired Modem.....	B-8
B.3	Using Windows NT RAS.....	B-11
B.3.1	Configuring Windows NT RAS .....	B-11
B.3.2	Creating a RAS User Account for the Palm Handheld.....	B-16

## **C Installing Oracle Mobile Field Service/Pocket PC**

C.1	Installing the Application on Your Pocket PC .....	C-1
C.1.1	Downloading and Installing the Oracle9i Lite Setup Program .....	C-2
C.1.2	Performing a ActiveSync to put Oracle9i Lite Components, Oracle Mobile Field Service, and the Database on the Pocket PC .....	C-2
C.1.3	Configuring mSync on the Pocket PC.....	C-4
C.1.4	Performing a Full Synchronization to Retrieve Oracle Mobile Field Service and Data .....	C-5
C.1.5	Launching Oracle Mobile Field Service .....	C-6
C.1.6	Creating a Shortcut for Oracle Mobile Field Service/Pocket PC .....	C-6
C.2	Subsequent Synchronizations.....	C-7

## **D Setting Up Debrief Reporting**

D.1	Set Up Billing Types and Service Activity Codes .....	D-1
D.1.1	Defining Billing Types .....	D-1
D.1.2	Setting Up Billing Type Attributes .....	D-3
D.1.3	Setting Up Service Activity Codes .....	D-4
D.1.4	Setting Up Material Service Activity Codes in Install Base .....	D-5
D.1.5	Mapping Service Activity Codes to a Business Process .....	D-7

## **E Setting Up for Install Base Transactions**

E.1	Setting Up System Items for Install Base Transactions .....	E-1
E.2	Setting up Install Base Profile Options .....	E-2
E.3	Removing and Installing Parts in Oracle Mobile Field Service/Laptop .....	E-3

## **F Setting Up State Transitions**

F.1	Setting Up Task Status Transitions .....	F-1
F.2	Assigning the State Transition Rule to a Responsibility .....	F-3

## **G Setting Up Spares Management in Oracle Mobile Field Service**

G.1	Ordering and Transferring Parts .....	G-1
G.2	Setting Up Resource Addresses and Subinventories .....	G-2

## **H Setting Up Descriptive Flexfields**

## **I Signature Capture**

## **J Process Flow**

J.1	The Oracle Field Service Process .....	J-1
J.2	Various Orders of Task Completion .....	J-3
J.3	Avoiding Multiple Task Assignments .....	J-4

**K Category Set for Item Replication**

**L National Language Support**

**Index**



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

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# Preface

Welcome to Release 11i (11.5.9) of the *Oracle Mobile Field Service Implementation Guide*. Because Oracle Mobile Field Service can be deployed on a laptop computer, Palm handheld, and Pocket PC, this guide covers the implementation of **Oracle Mobile Field Service/Laptop**, **Oracle Mobile Field Service/Palm**, and **Oracle Mobile Field Service/Pocket PC**. Therefore, the term, "Oracle Mobile Field Service application" is used in this guide as a reference to either of these applications.

## Intended Audience

This guide is intended for implementation engineers, system administrators, and any other administrator-level users who are required to implement and/or administer an Oracle Mobile Field Service application.

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## Related Documents

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

- *Installing Oracle Applications*
- *Oracle Mobile Application Foundation Implementation and Administration Guide, Release 11.5.9*
- *Oracle9i Lite Installation and Configuration Guide*
- *Oracle Field Service Implementation Guide*
- *Oracle Support Implementation Guide*
- *Oracle Applications CRM System Administrator's Guide*
- *Oracle Applications System Administrator's Guide*
- *Oracle Applications Flexfields Guide*

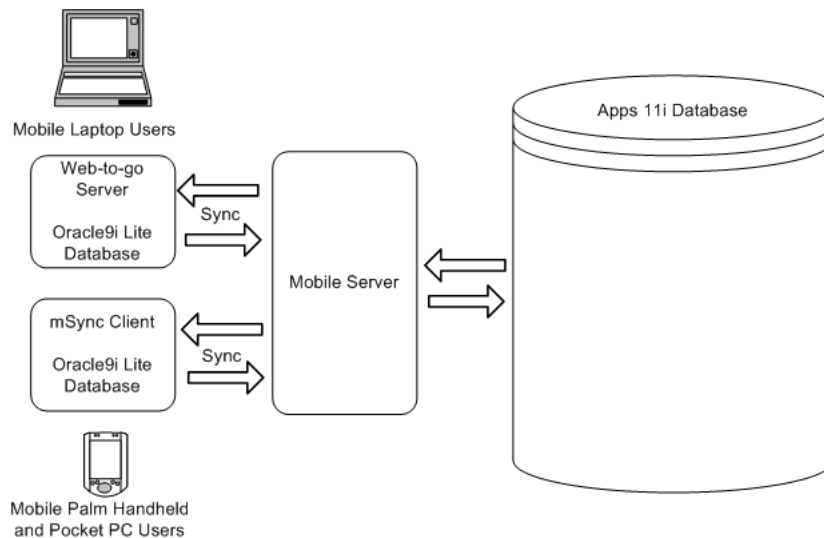
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# Introduction

Oracle Mobile Field Service comes in three types—laptop, Palm handheld, and Pocket PC. Oracle Mobile Field Service/Laptop, Oracle Mobile Field Service/Palm, and Oracle Mobile Field Service/Pocket PC are complete job-management applications that help field service representatives (FSRs) complete their daily responsibilities. These applications are part of the Oracle Field Service set of applications. Oracle Field Service in turn is part of the Oracle E-Business Suite, an integrated set of applications that are designed to work together.

Oracle Mobile Field Service applications synchronize with the enterprise system in order to receive new data, such as tasks and service requests, and also to send changes made in the application, such as creating report items and updating task statuses.



The enterprise system is based on the Oracle11i database. Information is exchanged between the mobile computer device and the enterprise system via the mobile server. The laptop computer uses the Web-to-go server and the Oracle9i Lite Database to send and receive information from the mobile server. The Palm handheld and Pocket PC use the mSync Client and the Oracle9i Lite Database to send and receive information from the mobile server. For additional details, see the *Oracle Mobile Application Foundation Implementation and Administration Guide*, Release 11.5.9.

## 1.1 Overview of Oracle Field Service

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. For a complete description of Oracle Field Service capabilities, see the *Oracle Field Service Implementation Guide* and [Appendix J, "Process Flow"](#).

The following table lists all the applications in the suite.

Suite Application	Description
Oracle Field Service	This application assists in assigning tasks to service representatives, creating and dispatching daily schedules, monitoring progress, and reporting on material, expense, and labor transactions.
Scheduler	This application enables optimization of scheduling capabilities of tasks to qualified resources. It takes into account driving time, distance, and part availability, and it creates part reservations.
Spares Management	This application is used to provide additional logistics and planning features to manage a service parts inventory in a multi-location environment.
<b>Oracle Mobile Field Service/Laptop</b>	This application is a disconnected application typically installed at a field service representative's laptop to receive his daily schedule and report on progress, material, expense, and labor.
<b>Oracle Mobile Field Service/Palm</b>	This application is a disconnected application for a Palm handheld so a field service representative can receive his daily schedule and report on progress, material, expense, and labor.

<b>Suite Application</b>	<b>Description</b>
<b>Oracle Mobile Field Service/Pocket PC</b>	This application is a disconnected application for a Pocket PC so a field service representative can receive his daily schedule and report on progress, material, expense, and labor.

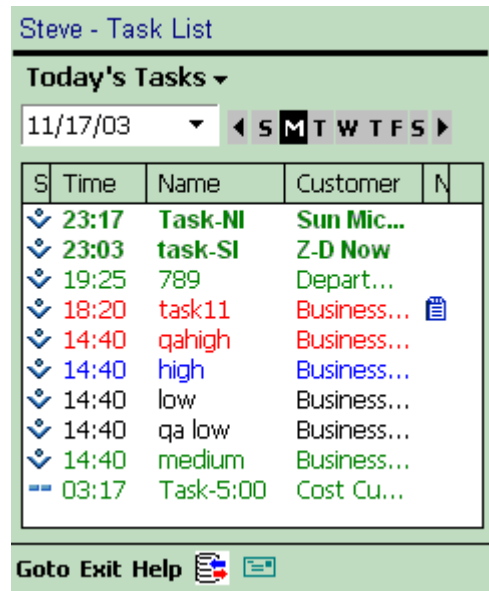
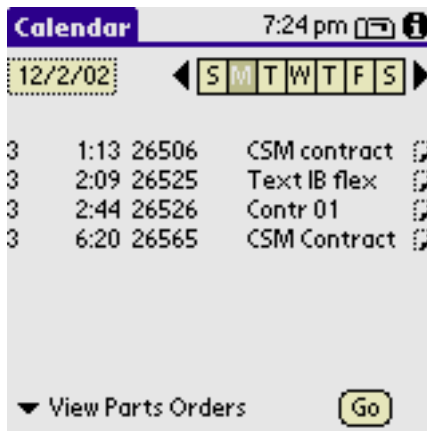
The Oracle Mobile Field Service applications integrate with the following application modules:

- **Oracle Install Base**  
Tracks the products installed at customer site
- **Oracle Application Foundation components**  
Oracle Application Foundation components such as Task Manager and Resource Manager manage various operations of Oracle Field Service

## 1.2 Overview of Oracle Mobile Field Service

Oracle Mobile Field Service converts a portable computer device into a workbench for FSRs. Oracle Mobile Field Service is the ideal solution for many service markets, such as HVAC, utilities, copier machine maintenance, telecommunications, and office-supply industries. This application enable FSRs to print service reports, view or update install-base records, and much more. For a complete description on how field service representatives may use Oracle Mobile Field Service in their work day, see [Appendix J, "Process Flow"](#).

For all the Oracle Mobile Field Service applications, the first screen or page describes the schedule for the day for the field services representative. This page or screen can also describe past and future responsibilities. The following graphics depict a typical Oracle Mobile Field Service/Palm Calendar screen and Oracle Mobile Field Service/Pocket PC Engineers Task List screen, respectively.



The following graphic depicts a typical Oracle Mobile Field Service/Laptop Calendar page.



### 1.2.1 Oracle Mobile Field Service Applications Compared

The following table compares the Oracle Mobile Field Service applications by feature.

Feature	Laptop	Palm	Pocket PC
View Task Summary	Yes	Yes	Yes
Search Task/SR	Yes	Yes	Yes
Create Task	Yes	Yes	Yes
Auto Assign Tasks	Yes	Yes	Yes
Task Detail/Change Task Status	Yes	Yes	Yes

<b>Feature</b>	<b>Laptop</b>	<b>Palm</b>	<b>Pocket PC</b>
Update Task (ETA, Equip ID)	Yes	Yes	Yes
Create Service Request	Yes	Yes	Yes
Service Request Details	Yes	Yes	Yes
Service Request Resolution	Yes	Yes	Yes
View Contractual Details	Yes	Yes	Yes
View Contract Notes	Yes	Yes	Yes
Customer Information	Yes	Yes	Yes
Counter Reading	Yes	Yes	Yes
Labor Debrief	Yes	Yes	Yes
Expense Debrief	Yes	Yes	Yes
Material Debrief	Yes	Yes	Yes
Search Parts	Yes	Yes	Yes
Transfer Parts	Yes	No	No
Create Part Order	Yes	Yes	No
View Part Order Status	Yes	Yes	No
Create/View Notes	Yes	Yes	Yes
Service History	Yes	Yes	Yes
Signature Capture	No	Yes	Yes
Credit Card Validation	Yes	Yes	Yes
Flexfield Support	Yes	Yes	Yes
Customization Support	Yes	Yes	Yes
Printing	Yes	Yes	No
Messaging and Notifications	Yes	Yes	No
View Install Base at Location	Yes	No	Yes
View Install Base Configuration	Yes	No	Yes
Parts Requirement Tied to a Task	No	No	Yes

## 1.2.2 Oracle Mobile Field Service Key Features Described

The following are key features of Oracle Mobile Field Service:

- [Service Requests and Tasks](#)
- [Debrief Reporting](#)
- [Spares Management](#)
- [Mobile Customization Support](#)

### 1.2.2.1 Service Requests and Tasks

The following are functions:

- **View and update service request and task**

Upon initial download, a task has a status of "Assigned". However, as the task progresses, the field service representative can change this status and task type.
- **Work on Task**

For a complete description on how field service representatives may complete a task, see [Appendix J, "Process Flow"](#).
- **Create a service request and task**

The dispatch center issues the service request and task to the field service representative. On some occasions, a problem may be detected at the customer site that was not recognized by the dispatch center. In this case, the field service representative can create a service request and task.

Tasks that you create on the mobile computer device are automatically assigned to you, provided that the task type is associated with the "dispatch rule" and the task has a status of "Assigned." You can immediately work on the new task assignment, including entering debriefs.

If the install base item for a service request is not correct, you are able to change this install base item. Furthermore, you can create a service request for an install base item at the customer location.
- **View Service History**

The Oracle Mobile Field Service applications display service history for closed or completed service requests, detailing any installed base item and customer information.

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

The following information is replicated for a service history record:

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

See [Appendix K, "Category Set for Item Replication"](#) for additional details about information replication.

- View customer and product information

Oracle Mobile Field Service provides you with ample information on the customer, such as address and notes. The application likewise describes the customer product well.

- Record counter readings

For customer product, Oracle Mobile Field Service enables you set and reset counter readings for this product if this is desirable. Counter readings are helpful in scheduling maintenance.

- Time zone support

Oracle Mobile Field Service allows operations across multiple time zones. All the times displayed on the client are local times. All times are stored in the database in server time. Appropriate conversions are made whenever required for storage or display. The `SERVER_TIMEZONE_ID` and `CLIENT_TIMEZONE_ID` profiles enable the server and client time zones to be set. If the appropriate profile options for either of these profiles are not defined, then no time zone conversion will occur and all times will be shown in the server time.

### 1.2.2.2 Debrief Reporting

In Oracle Mobile Field Service, a field service representative can report the labor time, materials, and expenses incurred during the completion of a task. For any labor, material, or expense report item that you create and have not synchronized, Oracle Mobile Field Service allows you to delete this report item.

- Material report item

For a material report, field service representatives specify the activity code and then the desired report item. Next, they specify how many of the desired items they require. To add the desired report item to the material report, the field service representative saves this item description.

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**Note:** For serial-controlled items, the field service representative can assign the serial number at debrief time for items not having a serial number.

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The following system items are replicated to mobile computer devices:

- Items used in a service request assigned to/created by the mobile user
- Item instance items used in a service request assigned to/created by the mobile user
- Items used in debrief lines
- Items used in item orders
- Items present in a good subinventory assigned to the mobile user
- Items present in the inventory organization specified by profile CSL\_APPL\_ORGANIZATION\_ID.
- Credit card  
Allows capture of credit card information for payment. Giving the customer the ability to pay by credit card is a convenience for both the customer and the service organization.
- Signature capture  
Oracle Mobile Field Service 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.

### 1.2.2.3 Spares Management

Oracle Mobile Field Service enables you to manage the parts inventory that you can use in the repair or replacement of parts for a service request. This is done through the following functions:

- **Order parts**

Field service representatives can order parts if a job requires. A part requirement can be tied to a task, and multiple parts can be ordered for each requirement.
- **View order status**

Once a part is ordered, a field service representative can access the status of the ordered part.
- **Transfer parts**

If a part is needed but not available at a convenient inventory, the desired part can be transferred to that convenient inventory field service representative. This process may prove to be more efficient than ordering the part.
- **Category set limiting**

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

### 1.2.2.4 Mobile Customization Support

Mobile customization enables you to tailor Oracle Mobile Field Service functionality to fit your business needs and practices. Customization is done through flexfields and the Software Development Kit (SDK). See the *Customization Support for Oracle Mobile Field Service* document or Oracle *MetaLink* Note: 248063.1 to learn more about the SDK.

- **Flexfields**

Descriptive flexfields provide customization capabilities in an Oracle Mobile Field Service application. This satisfies various user needs without having to reprogram the application.

Users can also use context-sensitive flexfields, when the information stored by the application depends on other values users enter in other parts of the form.

The following table describes the type of flexfields you can find in Oracle Mobile Field Service:

Flexfield	Laptop	Palm	Pocket PC
Service request	read/write	read/write	read/write
Task	read/write	read/write	read/write
Task assign	read/write	NA	NA
Debrief header	read/write	read/write	read/write
Debrief line	NA	NA	read/write
Parts requirement	NA	NA	read/write
Item	read	read	read
Product	read	read	read
Customer	read	read	read

- SDK
  - Through the use of the SDK, you can build custom screens for Oracle Mobile Field Service.

## 1.3 Migration

If you are upgrading from an Oracle Mobile Field Service 11.5.7 or earlier to the 11.5.9 release, refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide*, Release 11.5.9 to learn how to migrate your existing mobile application.

Release 11.5.8 marked the introduction of the Mobile Application Foundation architecture, which replaced the CRM Gateway for Mobile Devices architecture used in previous releases. Beginning with Release 11.5.8, Oracle Mobile Field Service use the new Mobile Application Foundation architecture.

Release 11.5.8 and later releases of Oracle Mobile Field Service are not compatible with the pre-11.5.8 CRM Gateway for Mobile Devices architecture. You must upgrade the mobile application and foundation at the same time.



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# Software and Hardware Requirements

This chapter describes the minimum software and hardware requirements of the Oracle Mobile Field Service applications.

## 2.1 Minimum Software Requirements

This section describes the minimum software requirements necessary to run Oracle Mobile Field Service on various platforms.

### 2.1.1 Enterprise Server

Refer to *Installing Oracle Applications* for the overall software requirements of the Oracle E-Business Suite. Also, refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide*, Release 11.5.9.

### 2.1.2 Laptop Client

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

### 2.1.3 Palm Client

This section describes the minimum software requirements for the Palm handheld and the PC used during the install.

### **2.1.3.1 Desktop PC (Palm Desktop)**

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

### **2.1.3.2 Palm Handheld**

- Operating system: Palm OS 3.5 or higher

## **2.1.4 Pocket PC Client**

This section describes the minimum software requirements for the Pocket PC and the PC used during the install.

### **2.1.4.1 Desktop PC (Pocket PC Desktop)**

- Operating system: Windows NT 4.0 (Service Pack 5), Windows 2000, Windows XP, or Windows ME
- ActiveSync 3.6 and above

### **2.1.4.2 Pocket PC**

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

## 2.2 Minimum Hardware Requirements

### 2.2.1 Enterprise Server

Refer to *Installing Oracle Applications* for overall hardware requirements for the E-Business Suite. Also, refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide*, Release 11.5.9.

### 2.2.2 Laptop Client

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

### 2.2.3 Palm Client

This section describes the minimum hardware requirements for the Palm handheld and the PC used during the install.

#### 2.2.3.1 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

#### 2.2.3.2 Palm Handheld

- Device: Any Palm handheld running Palm OS 3.5 or higher
- RAM: 4 MB of available RAM

## 2.2.4 Pocket PC Client

This section describes the minimum hardware requirements for the Pocket PC and the PC used during the install.

### 2.2.4.1 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

### 2.2.4.2 Pocket PC

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

## 2.3 Oracle Mobile Field Service Installation Dependencies

Before setting up the Oracle Mobile Field Service, there are several other Oracle applications or components which you must first install and implement. Refer to the *Mobile Applications: Patch Information* document (Note 241425.1 on [OracleMetaLink](#)) for details on the correct patches, dependencies, and the like.

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# Implementation

This chapter describes how to implement Oracle Mobile Field Service. The following are the basic steps needed to do this:

1. Verify dependencies.  
See "[Oracle Mobile Field Service Installation Dependencies](#)" on page 2-4.
2. Implement the Mobile Application Foundation.  
See "[Implementing the Mobile Application Foundation](#)" on page 3-2.
3. Publish the mobile application.  
See "[Installing the Mobile Application Patches](#)" on page 3-2.
4. Confirm the required enterprise setups.  
See "[Confirming Required Enterprise Setups](#)" on page 3-3.
5. Set profile options for Oracle Mobile Field Service.  
See "[Setting Profile Options for Oracle Mobile Field Service](#)" on page 3-7.
6. Schedule concurrent programs.  
See "[Scheduling Concurrent Programs](#)" on page 3-19.
7. Create and manage mobile users.  
See "[Creating and Managing Mobile Users](#)" on page 3-20.
8. Test the mobile application implementation.  
See "[Testing the Mobile Application Implementation](#)" on page 3-21.

## 3.1 Implementing the Mobile Application Foundation

Refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide*, Release 11.5.9 to learn how to implement the Mobile Application Foundation.

## 3.2 Installing the Mobile Application Patches

Refer to the *Mobile Applications: Patch Information* document (Note 241425.1 on [OracleMetaLink](#)) for details on the correct patches, dependencies, and the like.

Depending on the Oracle Mobile Field Service application you are implementing, install the required patches using the AD utility.

Complete the following steps to install the required patches for the desired Oracle Mobile Field Service application:

1. Shutdown Oracle9i Lite mobile server.
2. Install the required patches using the AD utility.
3. Start Oracle9i Lite mobile server.
4. After applying the patch, ensure that the JTM concurrent programs are running.

See "[Scheduling Concurrent Programs](#)" on page 3-19 for a complete description of this procedure.

## 3.3 Confirming Required Enterprise Setups

This section describes how to setup the enterprise-side system so certain mobile features work properly on the mobile computer device.

### 3.3.1 Setting Up Service Requests

The following table lists the service request setups that can be used to create, view, and update tasks in an Oracle Mobile Field Service application.

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

For details, refer to the *Oracle Support Implementation Guide*.

#### 3.3.1.1 Linking Service Request Statuses to Service Request Types

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

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

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

### 3.3.2 Setting Up Tasks

The following table lists the task setups that can be used to create, view, and update tasks in an Oracle Mobile Field Service application.

Component	Required or Optional
Task Statuses	Required
Task Status Transitions	Required (see <a href="#">Appendix F, "Setting Up State Transitions"</a> )
Task Types	Required
Task Priorities	Required
Task Templates	Optional

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

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**Notes:**

- The task status that is selected during service-task-creation is the one from the Field Service profiles: CSF: Default In Planning Status. You cannot change this.
  - When a service task is created, there will be no task assignment automatically created.
- 
- 

### 3.3.3 Setting Up Oracle Field Service Report

Oracle Field Service Report is part of the Oracle Field Service application and is used to report all material, expense, and labor transactions. From the Oracle Field Service Report screen, you can update inventory, install base, and charges.

When material, expense, and labor transactions are recorded in one of the Oracle Mobile Field Service applications, all transactions are shown and updated to inventory, install base, and charges from the Oracle Field Service Report.

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

See [Appendix D, "Setting Up Debrief Reporting"](#) to set up debrief reporting.

### 3.3.4 Setting Up Install Base

This procedure is only required if you are using Install Base. If so, Install Base should be set up to support Install Base updates when doing material transactions in an Oracle Mobile Field Service application. This should be set up after performing the setup steps necessary for debrief reporting.

An Oracle Mobile Field Service application supports two scenarios that affect Install Base:

- Removing a part
- Installing a new part

The following procedures are required to set up Install Base:

- Setting up system items for Install Base transactions
- Setting up Install Base profile options
- Removing and installing parts in Oracle Mobile Field Service/Laptop

See [Appendix E, "Setting Up for Install Base Transactions"](#) for complete details.

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**Notes:**

- Changing the install base replication profiles during operation becomes effective when the value is changed. Information will not be changed with retroactive effect based on the profiles.
  - Oracle Mobile Field Service/Palm does not support the removing of a part from an Install Base.
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### 3.3.5 Setting Up Counters

The set up of counters is only required if you are using Install Base. The following are the setups for counters that must be performed in order to report counter readings in an Oracle Mobile Field Service application:

- Counters
- Counter groups
- Counter properties
- Miscellaneous reading types

Refer to the *Oracle Service Implementation Guide*.

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**Note:** Only counters of type REGULAR are supported by the Oracle Mobile Field Service applications. Both counter values and counter property values can be entered in an Oracle Mobile Field Service application.

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### 3.3.6 Setting Up Messaging

Confirm that Messaging has been successfully installed and implemented.

## 3.4 Setting Profile Options for Oracle Mobile Field Service

In the Forms application is where you set profiles.

The following sections describe Oracle Mobile Field Service features that are controlled through profile settings.

### 3.4.1 Setting up Profile Options for Oracle Mobile Field Service/Laptop

For Oracle Mobile Field Service/Laptop, set the profile options listed in the following table. The table indicates the profile option name, a brief description, and available options.

Profile	Description	Options
JTM: Mobile Applications Enabled	Set the profile at the Oracle Field Service/Laptop responsibility level to <b>Y</b> . Only after setting the profile value can hooks/business events be enabled.	<b>Y</b> for Yes or <b>N</b> for No.
JTM: Application Conflict Rule	Enables Oracle Mobile Field Service/Laptop to handle updates to the database from the laptop computer.	<b>Client wins:</b> changes made by the mobile user are always applied to the enterprise database. No timestamp checking is done. <b>Timestamp:</b> changes made by the mobile user are applied to the enterprise database if the record has not been modified since the mobile user last synchronized. If the record has been modified in the meanwhile, then the mobile user's change is not applied and becomes a deferred transaction.

<b>Profile</b>	<b>Description</b>	<b>Options</b>
JTM: Number of Previously Closed Service Requests	Defines the number of previously closed service requests to be replicated. It is recommended that you send down three to five service requests. Do not set very high values because of laptop computer limitations on data set size.	Use <b>0</b> to disable the history functionality. The default is <b>0</b> .
JTM: Synchronous Service History Collection	Sets how previously closed service requests are collected (performance is a factor).	<b>Yes</b> for synchronous history collection. <b>No</b> for asynchronous history collection. The default is <b>No</b> .
JTM: Enable Credit Card Functionality	Hides credit card information by means of a profile.	<b>Yes</b> or <b>No</b> .
CSL: Laptop Inventory Organization	All system items from the inventory organization are replicated to the mobile client.	The values are the organization codes of the inventory organizations (called "organization name" during profile setup).
CSL: Item Category Filter	Use to filter item categories.	
CSL: Item Category Set Filter	Use to filter item category sets.	
CSL: Number of IB Items at Location	The number of install base items to be downloaded for a given customer location.	Can be <b>0</b> to any number. The default is <b>0</b> .

Profile	Description	Options
CSL: Replicate Install Base Product Children	For a service request that has an install base item, this profile allows the children of the install base item to be viewed in Oracle Mobile Field Service/Laptop The user can view the install base item and any children of the install base item, or one hierarchal level below the install base item.	<b>Yes or No.</b>
CSL: Replicate Install Base Product Parents	For a service request that has an install base item, this profile allows the parents of the install base item to be viewed in Oracle Mobile Field Service/Laptop The user can view the install base item and the parents of the install base item, or one hierarchal level above the install base item.	<b>Yes or No.</b>

Profile	Description	Options
CSF: Business Process	Enables you to specify the order of task completion for the field service representative.	<p>Option 1 indicates that the field service representative is to work on one task at a time in a fixed order (ordered by scheduled start date).</p> <p>Option 2 indicates that the field service representative can only work on one task, but in any order. Only the task with status set to 'Working' can be updated. If no task is set to 'Working', the status of all open task can be updated. This way the field service representative can select a task by setting its status to 'Working'.</p> <p>Option 3 indicates that the field service representative can work on any number of tasks in any order. The working flag will be ignored in this scenario.</p>
CSF: Update Planned/Scheduled Times Allowed	Specifies whether field service representatives are allowed to change the planned or scheduled times of the tasks they have received on the laptop computer.	<b>Yes or No.</b>
CSL: Allow Overlapping Labor Lines	Setting the profile to <b>No</b> does not allow overlapping labor lines within a task. Therefore, a field service representative cannot have two labor lines for the same time period. The second labor line starts only after the first one has finished.	<b>Yes or No</b> , with <b>No</b> as the default. When the profile option is set to <b>Yes</b> , the technician is allowed to enter overlapping actual start and end times for various assignments for a given day. When the profile option is set to <b>No</b> , the technician does not have the ability to enter the overlapping times.

Profile	Description	Options
CSL: Time Reasonability Check Apply	<p>Reasonability checks to ensure that valid inputs are entered during debrief and task creation on the mobile computer device.</p> <p>The following reasonability checks need to be added to Oracle Mobile Field Service/Laptop to insure quality of data entered by the technician:</p> <ul style="list-style-type: none"> <li>- Values entered for Planned Start date/time must be greater than Incident date/time on SR header for create/update of task</li> <li>- Values entered for Planned End date/time must be greater than Incident date/time on SR header for create/update of task</li> <li>- Values entered for Service Date and Labor Start date/time on Debrief may not be less than Incident date/time on SR header.</li> <li>- Values entered for Service Date on Debrief may not be less than Incident date/time on SR header.</li> </ul>	<b>Yes or No</b> , with <b>Yes</b> being the default.

Profile	Description	Options
	<p>- Values entered for Labor Start date/time and Service Date on Debrief may not be future-based on current date/time on the device.</p> <p>- Values entered for Labor End date/time and Service Date on Debrief line item may not be future-based on current date/time on the device.</p> <p>- Values entered for Labor End date/time and Service Date on Debrief may not be less than Incident date/time on SR header.</p>	
<p>CSL: Labor Line Total Check</p>	<p>Reasonability check to ensure total time at site does not exceed total labor time plus delta.</p> <p>For debrief reporting in Oracle Mobile Field Service/Laptop, the difference between max (last labor end date/time) and min (earliest labor start date/time) must not be more than one hour greater than the sum of labor line durations.</p> <p>Max - min &lt;= sum of labor lines + T</p> <p>Where T is the time in hours. The profile setting will give the value for this.</p>	<p>Default is <b>0</b>.</p> <p>If set to <b>0</b>, then the check is not valid.</p> <p>If set to <b>1</b>, then T=1</p> <p>If set to <b>2</b>, then T=2</p>

Profile	Description	Options
CSL: Allow Long Notes	Determines if field service representatives are allowed to enter notes longer than 2000 characters.	<b>Yes</b> to allow long notes; note that the maximum character count is 2000. With this profile switched on, a field service representative can type in longer notes which after being saved are split into multiple notes. These multiple notes are replicated to the backend.
CSL: Notifications Scope	Defines to whom messages can be sent.	Resource group or all users, with resource group being the default.
CSL: Number of Days Before Data is Removed on the Client	Defines the number of days for data to remain on Oracle Mobile Field Service/Laptop after it is last edited. When the number of days has expired, it is removed from Oracle Mobile Field Service/Laptop.	Number of days before data is removed on the client.

### 3.4.2 Setting up Profile Options for Oracle Mobile Field Service/Palm

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

Profile	Description	Options
JTM: Mobile Applications Enabled	Set at the Oracle Field Service/Palm responsibility level to <b>Y</b> . Only after setting the profile value can hooks or business events be enabled.	<b>Y</b> for Yes or <b>N</b> for No.

Profile	Description	Options
JTM: Application Conflict Rule	Enables Oracle Mobile Field Service/Palm to resolve conflicts between multiple updates to the same object.	<b>Client wins:</b> Changes made by the mobile user are always applied to the enterprise database. No timestamp checking is done. <b>Server wins:</b> Changes made by the mobile user are applied to the enterprise database if the record has not been modified since the mobile user last synchronized. If the record has been updated in the back end, then the mobile user's change is not applied.
CSM: Number of Previously Closed Service Requests	Defines the number of previously closed service requests to be replicated. It is recommended that you send down three to five service requests. Do not set very high values because of Palm handheld limitations on data set size.	Use <b>0</b> to disable the history functionality. The default is <b>0</b> .
CSM: Synchronous History Collection	Sets how previously closed service requests are collected (performance is a factor).	<b>Yes</b> for synchronous history collection. <b>No</b> for asynchronous history collection. The default is <b>No</b> .
CSF: History_M	Defines the number of days that data will remain in Oracle Mobile Field Service/Palm, after it was last edited. When the number of days expires, the data is removed from the application.	Number of days before data is removed on the client.  If you specify no days, then the data is never removed.
JTM: Enable Credit Card Functionality	Enables the credit card capture functionality.	<b>Yes or No.</b>
CSF: Palm Item Organization	All system items from the subinventories of the inventory organization that the user has access to are replicated to the mobile client.	The values are the organization codes of the inventory organizations (called organization name during profile setup).

<b>Profile</b>	<b>Description</b>	<b>Options</b>
CSM: Item Category Filter	Use to filter item categories.	
CSM: Item Category Set Filter	Use to filter item category sets.	
CSM: Notifications Scope	Defines to whom messages can be sent.	<b>0</b> = All Oracle Mobile Field Service users. <b>2</b> = All the field service representatives in the group
CSF: Conform to Schedule	Specifies whether field service representatives must conform to the schedule or they are allowed to complete tasks in any sequence on their laptop computer or Palm handheld.	<b>Yes or No.</b>
Service: Inventory Validation Organization	Used to validate inventory item IDs that are associated with debrief lines.	Define the master organization for the user at the responsibility level for Oracle Mobile Field Service/Palm. Therefore, all downloaded inventory items will be validated.

### 3.4.3 Setting up Profile Options for Oracle Mobile Field Service/Pocket PC

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

Profile	Description	Options
JTM: Mobile Applications Enabled	Set at the Oracle Field Service/Palm responsibility level to <b>Y</b> . Only after setting the profile value, can hooks or business events be enabled.  <b>Note:</b> The Oracle Field Service/Palm responsibility is used for both the Oracle Mobile Field Service/Palm and Oracle Mobile Field Service/Pocket PC applications.	<b>Y</b> for Yes or <b>N</b> for No.
JTM: Application Conflict Rule	Enables Oracle Mobile Field Service/Pocket PC to resolve conflicts between multiple updates to the same object.	<b>Client wins:</b> Changes made by the mobile user are always applied to the enterprise database. No timestamp checking is done. <b>Server wins:</b> Changes made by the mobile user are applied to the enterprise database if the record has not been modified since the mobile user last synchronized. If the record has been updated in the back end, then the mobile user's change is not applied.
CSM: Number of Previously Closed Service Requests	Defines the number of previously closed service requests to be replicated. It is recommended that you send down three to five service requests. Do not set very high values because of Pocket PC limitations on data set size.	Use <b>0</b> to disable the history functionality. The default is <b>0</b> .
CSM: Synchronous Service History Collection	Sets how previously closed service requests are collected (performance is a factor).	<b>Yes</b> for synchronous history collection. <b>No</b> for asynchronous history collection. The default is <b>No</b> .

Profile	Description	Options
CSF: History_M	Defines the number of days that data will remain in Oracle Mobile Field Service/Pocket PC, after it was last edited. When the number of days expires, the data is removed from the application.	A value representing the number of days before data is removed from Oracle Mobile Field Service/Pocket PC.  If you specify no days, then the data is never removed.
JTM: Enable Credit Card Functionality	Enables the credit card capture functionality.	<b>Yes or No.</b>
CSF: Palm Item Organization	All system items from the subinventories of the inventory organization that the user has access to are replicated to the mobile client.	The values are the organization codes of the inventory organizations.
CSF: Business Process	Enables you to specify the order of task completion for the field service representative.	Option 1 indicates that the field service representative is to work on one task at a time in a fixed order (ordered by scheduled start date).  Option 2 indicates that the field service representative can only work on one task, but in any order. Only the task with status set to 'Working' can be updated. If no task is set to 'Working', the status of all open task can be updated. This way the field service representative can select a task by setting its status to 'Working'.  Option 3 indicates that the field service representative can work on any number of tasks in any order. The working flag will be ignored in this scenario.
CSM: Item Category Filter	Use to filter item categories.	
CSM: Item Category Set Filter	Use to filter item category sets.	

<b>Profile</b>	<b>Description</b>	<b>Options</b>
CSM: Number of IB Items at Location	The number of install base items to be downloaded for a given customer location.	Can be <b>0</b> to any number. The default is <b>0</b> .
CSM: Restrict Number of Items to Search for in LOV	Limits the number of search results shown in the search screens if there are too many items. The user can limit the search by using a filter to reduce the number of items retrieved in the search.	Can be <b>1</b> to any number. The default is <b>100</b> .
Service: Inventory Validation Organization	Used to validate inventory item IDs that are associated with debrief lines.	Define at responsibility level for Oracle Mobile Field Service/Pocket PC to be the master organization for the user. Hence, all downloaded inventory items will be validated.

### 3.5 Scheduling Concurrent Programs

Concurrent program scheduling is categorized for the lookup, transaction, and inventory categories.

Formerly, all concurrent programs were registered with one JTM concurrent program, MOBILE\_CON\_PROGRAM. JTM has a new concurrent program, JTM Master Concurrent Program, which accepts the lookup, transaction, and inventory categories as parameters. Now, concurrent programs are categorized for the lookup, transaction, and inventory categories.

For an Oracle Mobile Field Service application, schedule the concurrent programs listed in the table below. For instructions on how to set up concurrent programs, refer to the *Oracle Applications System Administrator's Guide*.

Name	Application	Description	Default (Recommended) Schedule
Processes Uploaded Mobile Data	Laptop Palm Pocket PC	Processes uploaded mobile data and applies it to the enterprise system	Every 1 minute
Manage Mobile Users	Laptop Palm Pocket PC	Creates or removes mobile users automatically based on assigned mobile responsibilities	Every 1 hour
JTM: Master Concurrent Program	Laptop Palm Pocket PC	The JTM master concurrent program, which runs all concurrent jobs registered by mobile applications	TRANSACTION: every 5 minutes LOOKUP: every 30 minutes INVENTORY: once a day PURGE: as often as required (Default is set to once per month)
Workflow Background Process	Palm Pocket PC	Item Type: CSM Type3 Process Deferred: Yes Process Timeout: Yes Process Stuck: Yes	Start: Right at the moment Run the job: Periodically Re-run: Every 0.5 minute Apply the Interval: From the completion of the prior run

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**Note:** If there is a major delay for the Workflow Background Process to handle the item type CSM TYPE3 processes, then you should schedule more than one Workflow Background Process concurrent programs for item type CSM TYPE3. The number of Workflow Background Process concurrent programs to be scheduled depends on the workload of how many CSM TYPE3 processes are to be processed. This is important to boost the performance and ensure that mobile users can get online updates promptly.

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## 3.6 Creating and Managing Mobile Users

Users who have the Oracle Field Service/Palm responsibility assigned to them have access to either the Oracle Mobile Field Service/Palm or Oracle Mobile Field Service/Pocket PC application. Likewise, users who have the Oracle Field Service/Laptop responsibility assigned to them have access to the Oracle Mobile Field Service/Laptop application. To create users for an Oracle Mobile Field Service application, create the users as described in the *Oracle Field Service Implementation Guide*. Ensure that the following procedures have been completed:

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

After completing these procedures, assign either the Oracle Field Service/Palm or Oracle Field Service/Laptop responsibility to the users, depending on the Oracle Mobile Field application they are using. Access to the Oracle Mobile Field Service application is based on the same usernames and passwords as the enterprise system.

There is a concurrent program in the Mobile Application Foundation that periodically allocates resources for users that have a mobile responsibility, so there will be a delay between when the responsibility is assigned and when the change will take effect. Refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide*, Release 11.5.9 for information on how to manually run the concurrent program to expedite the creation of a new user.

Mobile users can change their passwords in the Forms application or by requesting that the system administrator make this change for them. Both of these topics are described in the *Oracle Applications System Administrator's Guide*.

If you remove the Oracle Field Service/Laptop responsibility or Oracle Field Service/Palm responsibility from a user, that user will no longer be able to use the Oracle Mobile Field Service application and synchronize. However, the application will remain on his mobile computer device.

For further details about creating and managing mobile users, refer to note 219019.1 on *OracleMetaLink*.

## 3.7 Testing the Mobile Application Implementation

Once you have implemented Oracle Mobile Field Service, you should then test that the implementation is successful.

### 3.7.1 Running the Test

#### Steps

Complete the following steps to verify that the implementation of the Oracle Mobile Field Service application was successful:

1. Create a test user and then assign the user either the Oracle Field Service/Laptop or Oracle Field Service/Palm responsibility, depending on the type of Oracle Mobile Field Service application.

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**Note:** The Oracle Field Service/Palm responsibility is used for both the Oracle Mobile Field Service/Palm and Oracle Mobile Field Service/Pocket PC applications.

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2. Install the Oracle Mobile Field Service application on the desired test mobile computer device.
  - For details on how to install Oracle Mobile Field Service/Laptop, refer to [Appendix A, "Installing Oracle Mobile Field Service/Laptop"](#).
  - For details on how to install Oracle Mobile Field Service/Palm, refer to [Appendix B, "Installing Oracle Mobile Field Service/Palm"](#).
  - For details on how to install Oracle Mobile Field Service/Pocket PC, refer to [Appendix C, "Installing Oracle Mobile Field Service/Pocket PC"](#).
3. From the Field Service Dispatch Center, create a task and then assign it to the test user.

4. Synchronize the mobile computer device.  
The Oracle Mobile Field Service application receives the task.
5. Change the task assignment status on the mobile computer device and then synchronize.
6. Confirm that the task status update is reflected in the dispatch center.

### 3.7.2 Final Checks

If you have problems running the Oracle Mobile Field Service application, ensure that you have met the following requirements:

- Material items must be created and associated with the field service representative's inventory.
- The task state transitions must be set up in Field Service.
- Field service representatives must have a location associated with them.
- A request or task must have a location before it can be scheduled.
- The Oracle Field Service/Laptop responsibility or Oracle Field Service/Palm responsibility must be granted to you, depending on the Oracle Mobile Field Service application that you are using.

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**Note:** The Oracle Field Service/Palm responsibility is used for both the Oracle Mobile Field Service/Palm and Oracle Mobile Field Service/Pocket PC applications.

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- Labor and expense items need to be set up.
- If you are still experiencing problems, then use the diagnostics described in "[Running Diagnostic Tests](#)" on page 4-2.

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# Administrating and Troubleshooting

This chapter describes how to perform Oracle Mobile Field Service administrative tasks and how to troubleshoot runtime problems.

## 4.1 Setting the Conflict Resolution Rule

The profile option, JTM: Application Conflict Rule, specifies the conflict resolution rule that is used in case of updates to the same entity by both the enterprise system and the Oracle Mobile Field Service application.

This profile option determines how the Oracle Mobile Field Service application makes updates to the database. The following are the possible types of updates:

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

## 4.2 Reviewing Upload Errors

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

- System issues

It is possible that the system is on a different mobile patch level than what is required.

- Setup issues

The right business process type or the right profile setting is not set on the enterprise system. For example, it is necessary that the expense type for an expense line is set correctly.

- Faulty data or conflicts

The Mobile Application Foundation maintains a log of all upload errors. You can use the Mobile Application Foundation Administration Console to view and manage these errors. Refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide*, Release 11.5.9 to learn how to resolve upload error issues.

## 4.3 Running Diagnostic Tests

Diagnostic testing can be done for the Mobile Application Foundation and the Oracle Mobile Field Service application.

### 4.3.1 Testing Mobile Application Foundation

For instructions on how to run a diagnostic test against the Mobile Application Foundation, refer to the *Oracle Mobile Application Foundation Implementation and Administration Guide*, Release 11.5.9.

### 4.3.2 Testing Mobile Applications

Run the following diagnostic test to ensure that the install and operation of the Oracle Mobile Field Service application is correct.

#### Steps

Complete the following steps to access the diagnostic screens of the Forms application:

1. Log in to the CRM System Administrator Console as a system administrator.
2. Click the Diagnostics tab.
3. Depending on your mobile computer device, choose either **Oracle Field Service/Palm** or **Oracle Field Service/Laptop** from the Application drop-down list.

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**Note:** The Oracle Field Service/Palm responsibility is used for both the Oracle Mobile Field Service/Palm and Oracle Mobile Field Service/Pocket PC applications.

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The Diagnostics application displays the Test Summary table and a table showing any failures in the past week.

4. Click the Advanced tab.

In the Advanced tab, enter the parameters for the test that you want to run. From the Basic tab, you can run all non-parameter tests for the application.

Refer to the *Oracle Applications CRM System Administrator's Guide* or the online help system to learn how to use the Diagnostics Framework user interface.

The client-side tests run automatically on the mobile computer device when you open an Oracle Mobile Field Service application. You can also run these tests any time to verify the correct setup of the Oracle Mobile Field Service application.

The following table lists diagnostic tests, test descriptions, observed symptoms, and proposed resolutions for Oracle Mobile Field Service/Laptop:

Test for Oracle Mobile Field Service/Laptop	Location	Problem	Resolution
JTM Master Concurrent Program	Backend	Are the concurrent programs running?	Provides detailed diagnostic information about the JTM Master Concurrent Program. If necessary, it tells system administrators which settings should be modified.

<b>Test for Oracle Mobile Field Service/Laptop</b>	<b>Location</b>	<b>Problem</b>	<b>Resolution</b>
Environment Setup	Backend	Is the environment correct?	Provides support for debugging the configuration of Oracle9i Lite. It allows the administrator to check if the recommended settings are followed correctly. It also helps in identifying common issues with external authentication, installation manager, profile option values, etc.

The following table lists diagnostic tests, test descriptions, observed symptoms, and proposed resolutions for Oracle Mobile Field Service/Palm:

<b>Test for Oracle Mobile Field Service/Palm</b>	<b>Location</b>	<b>Problem</b>	<b>Resolution</b>
Check Oracle9i Lite Version and libraries	Client Side	Incompatible Oracle9i Lite version or missing libraries.	Install correct Oracle9i Lite libraries.
Check Database - Publication Items and other Oracle9i Lite tables	Client Side	Required objects missing. The application opens with no tables or data.	Re-install client application.
User authentication	Client	Invalid username or password.	Check username, password, and user subscriptions.
Check Palm OS version	Client	Application is not certified with Palm OS 3.5 or lower.	Install Palm OS 3.5 or higher.
Responsibility	Backend	User may not have proper responsibility.	Assign proper responsibilities.
Profile values	Backend	Profile values for Field Service Palm are not set.	Set profile values.
User Hooks Registration	Backend	Hooks registration is not done.	Contact your Oracle technical support representative.

<b>Test for Oracle Mobile Field Service/Palm</b>	<b>Location</b>	<b>Problem</b>	<b>Resolution</b>
Check Concurrent Program	Backend	All required concurrent programs might not be running.	Make sure that the concurrent programs are running.
JTM Concurrent Program registration	Backend	For JTM Concurrent Program APIs are not registered.	Contact your Oracle technical support representative.
JTM Master Concurrent Program	Backend	Are the concurrent programs running?	Provides detailed diagnostic information about the JTM Master Concurrent Program. If necessary, it tells system administrators which settings should be modified.
Environment Setup	Backend	Is the environment correct?	Provides support for debugging the configuration of Oracle9i Lite. It allows the administrator to check if the recommended settings are followed correctly. It also helps in identifying common issues with external authentication, installation manager, profile option values, etc.
Task diagnostic	Backend	Task is assigned incorrectly.	Assign task correctly.
Check required list of values	Backend	List of values are empty.	Create all list of values.

The following table lists diagnostic tests, test descriptions, observed symptoms, and proposed resolutions for Oracle Mobile Field Service/Pocket PC:

<b>Test for Oracle Mobile Field Service/Pocket PC</b>	<b>Location</b>	<b>Problem</b>	<b>Resolution</b>
Responsibility	Backend	User may not have proper responsibility.	Assign proper responsibilities.

<b>Test for Oracle Mobile Field Service/Pocket PC</b>	<b>Location</b>	<b>Problem</b>	<b>Resolution</b>
Profile values	Backend	Profile values for Field Service Palm are not set.	Set profile values.
User Hooks Registration	Backend	Hooks registration is not done.	Contact your Oracle technical support representative.
Check Concurrent Program	Backend	All required concurrent programs might not be running.	Make sure that the concurrent programs are running.
JTM Concurrent Program registration	Backend	For JTM Concurrent Program APIs are not registered.	Contact your Oracle technical support representative.
JTM Master Concurrent Program	Backend	Are the concurrent programs running?	Provides detailed diagnostic information about the JTM Master Concurrent Program. If necessary, it tells system administrators which settings should be modified.
Environment Setup	Backend	Is the environment correct?	Provides support for debugging the configuration of Oracle9i Lite. It allows the administrator to check if the recommended settings are followed correctly. It also helps in identifying common issues with external authentication, installation manager, profile option values, etc.
Task diagnostic	Backend	Task is assigned incorrectly.	Assign task correctly.
Check required list of values	Backend	List of values are empty.	Create all list of values.

## 4.4 Configuring Logging

Oracle Mobile Field Service applications use the CRM Technical Foundation logging framework to log messages to a central repository that is shared by both the database and the middle tier servers. Each log message belongs to one of the following six severities: 1-Statement, 2-Procedure, 3-Event, 4-Exception, 5-Error, 6-Unexpected. UI screens give system administrators convenient and simple controls for configuring and viewing the logs.

Refer to the *Oracle Applications CRM System Administrator's Guide* or the online help to learn how to use the Logging screens.

### Steps

Complete the following steps to configure logging for all modules:

1. Log in to the CRM System Administrator Console as a system administrator.
2. Navigate to `Setting > System > Debug Logging > Configuration`.
3. Set the following values:
  - Enabled = ON
  - Level = Statement
  - Repository = Database
  - Module filter = `include string csm%`
4. Click **Update** to save the values.
5. Bounce Apache (the middle-tier server).

---

---

**Note:** Turn the logger off after you finish troubleshooting. This changes the values of the above fields back to their original values. Logging at this level of detail consumes resources and could impact the performance of your system.

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In addition to these logs, you can use the Oracle9i Lite Mobile Server logging facility to troubleshoot problems with user synchronizations. Refer to the *Oracle9i Lite Mobile Server Administration Guide Release 5.0.2* for more details.

## 4.5 Common Issues

This section describes the most common issues encountered in the implementation of Oracle Mobile Field Service.

### 4.5.1 Viewing Items Stocked in a Subinventory

#### **Problem**

Trackable items that have been stocked in a subinventory are now displayed in the inventory list of the application.

#### **Resolution**

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

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# Installing Oracle Mobile Field Service/Laptop

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

## A.1 Installing the Application on Your Laptop Computer

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

For the minimum software and hardware requirements for the a laptop computer, see "[Minimum Software Requirements](#)" on page 2-1 and "[Minimum Hardware Requirements](#)" on page 2-3.

### Steps

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

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

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

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

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

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

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

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

5. Choose an install directory.

For example, `C:\ora_HOME` and then click **OK**. The setup program downloads all the required components.

Once the installation is complete, your browser launches and opens the Oracle9i Lite Workspace Logon page. This page contains fields where you specify your user name and password.

Oracle9i Lite

Help | Logon

Workspace

Logon

■ [About Web-to-Go](#)

User Name:

Password:

Logon

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

If the browser does not launch automatically, the setup program will display the Web-to-Go URL. For example, `http://my-laptop`. In this case, click the URL.

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

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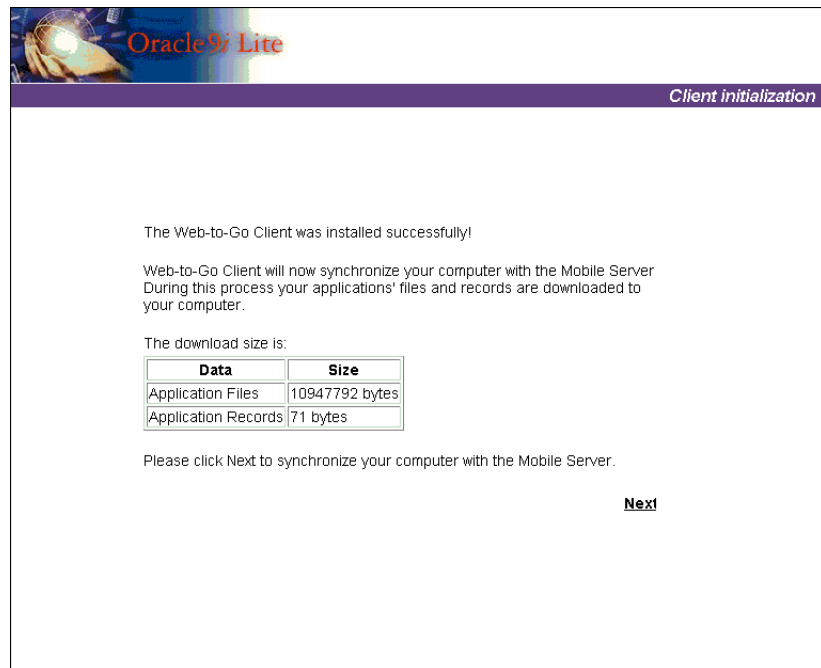
---

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

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

7. Click **Logon**.

The Oracle9i Lite Client Initialization page opens with initialization status for the files and records of Oracle Mobile Field Service/Laptop. This status includes the amount of bytes downloaded onto your laptop computer.



The Web-to-Go Client was installed successfully!

Web-to-Go Client will now synchronize your computer with the Mobile Server. During this process your applications' files and records are downloaded to your computer.

The download size is:

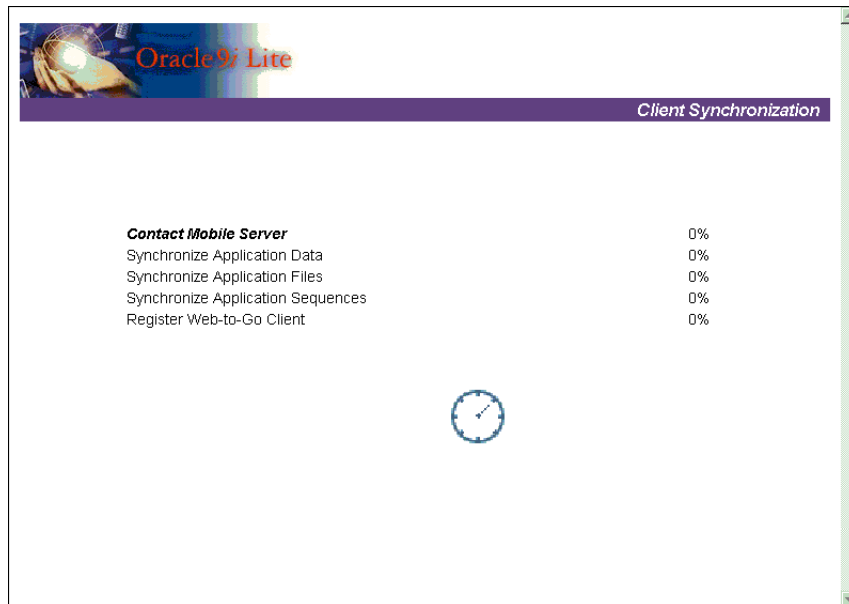
Data	Size
Application Files	10947792 bytes
Application Records	71 bytes

Please click Next to synchronize your computer with the Mobile Server.

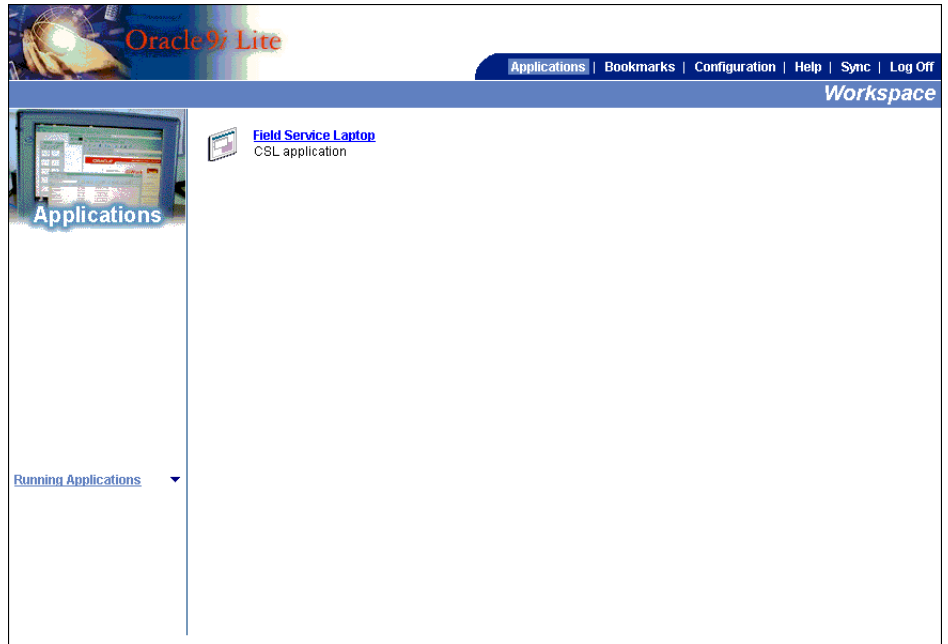
[Next](#)

8. Click **Next**.

The Oracle9i Lite Client Synchronization page opens with the current synchronization process in bold, italic text. A percentage value is found near each synchronization process to indicate its status. The initial synchronization downloads the application and your initial set of data. The synchronization takes several minutes; therefore, do not exit the browser until the synchronization is complete.



After synchronization completes, the browser displays the Oracle9i Lite Workspace page.



**9. Click Field Service Laptop.**

The Oracle Mobile Field Service/Laptop Calendar page opens.

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

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

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

## A.2 Starting Oracle Mobile Field Service/Laptop

### Steps

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

1. From the Start menu, choose Programs > Oracle for Windows NT > Web to Go.

The internet browser opens in the login page. You can also access the login page by clicking on the Web-to-Go icon on the desktop.

Your internet browser opens the Oracle E-Business Suite login page.

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

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

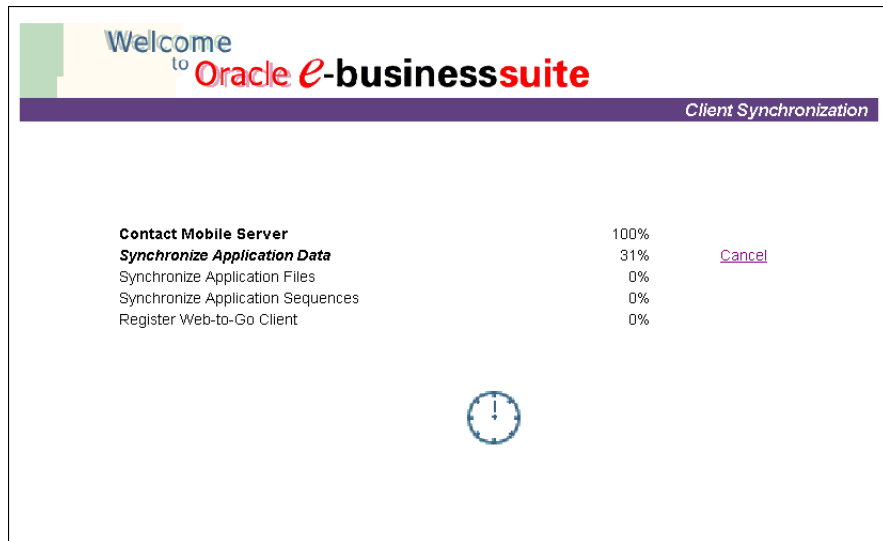
Oracle Mobile Field Service/Laptop opens in the Calendar page (Daily View).

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

3. To do an incremental synchronization, click the **Synchronize** button in the upper right corner of the Calendar page.

The Oracle E-Business Suite Client Synchronization page opens with the current synchronization process in bold, italic text. A percentage value is found near

each synchronization process to indicate its status. Click **Cancel** to terminate the current synchronization process.



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## Installing Oracle Mobile Field Service/Palm

This appendix describes how to install Oracle Mobile Field Service onto a Palm handheld.

### B.1 Installing the Application on Your Palm Handheld

For the minimum software and hardware requirements for the a Palm handheld, see "[Minimum Software Requirements](#)" on page 2-1 and "[Minimum Hardware Requirements](#)" on page 2-3.

To install Oracle Mobile Field Service on your Palm handheld, complete the procedures listed in the following table:

Procedure	Performed At
<b>Procedure 1:</b> Downloading and Installing the Oracle9i Lite Setup Program	Client PC (the PC that the Palm handheld HotSyncs to)
<b>Procedure 2:</b> Performing a HotSync to put Oracle9i Lite Components on the Palm handheld	Client Palm
<b>Procedure 3:</b> Establishing an Oracle Conduit on the Palm HotSync Manager	Client PC
<b>Procedure 4:</b> Configuring mSync on the Palm handheld	Client Palm
<b>Procedure 5:</b> Performing a Full Synchronization to Retrieve the Field Service Application and Data	Client Palm
<b>Procedure 6:</b> Launching the Oracle Mobile Field Service application	Client Palm

See [Appendix E, "Setting Up for Install Base Transactions"](#) for details on how to set up the various modes of communication with the Palm handheld.

### B.1.1 Step 1: Downloading and Installing the Oracle9i 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 Palm 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.
6. After you download the necessary files, the setup program prompts you to select a Palm user.

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**Note:** If the Palm handheld desktop is not installed, the setup program will prompt you to install it. Also, you will need to manually publish all PRC files if they have not been published.

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When you have installed the Palm handheld desktop, the setup program informs you that the components are successfully installed and will be uploaded with the next HotSync.

If you have not installed the Palm handheld desktop, install the Palm handheld desktop and rerun the setup program.

### **B.1.2 Step 2: Performing a HotSync to put Oracle9i/Lite Components, Oracle Mobile Field Service, and the Database on the Palm Handheld**

Complete the following procedure:

#### **Steps**

1. After you download and install the Palm handheld desktop, launch the Palm handheld desktop.
2. From the HotSync menu, select **Setup**, click the Network tab, then select the user for performing a network HotSync operation.
3. Perform a HotSync to put Oracle9i Lite components, the application, and the database on the Palm handheld.

To do a HotSync to retrieve the actual Oracle Mobile Field Service application and the data associated with it, the computer that hosts the HotSync Manager must have an HTTP connection with the Mobile Server.

### **B.1.3 Step 3: Establishing an Oracle Conduit on the Palm HotSync Manager**

Complete the following procedure:

#### **Steps**

1. Copy the `conshttp_reg.exe` file from `C:/ORANT/palm` to the HotSync directory.
2. Start the HotSync Manager.
3. Run `conshttp_reg.exe`. When you double-click the file, nothing will be displayed, but the program will indeed be running.
4. Close and restart the HotSync Manager.

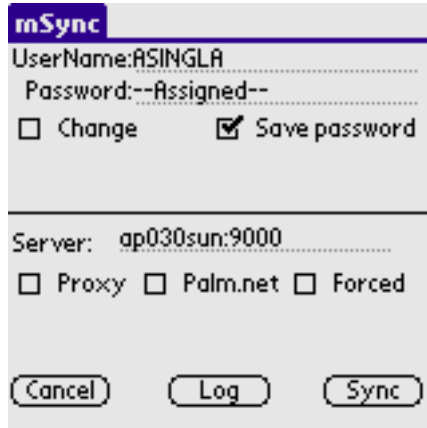
### **B.1.4 Step 4: Configuring mSync on the Palm Handheld**

Follow this procedure to install the Oracle Mobile Field Service application and the database on the Palm handheld.

## Steps

1. Tap the mSync icon on the Palm handheld.

The mSync screen opens.



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

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	Leave this check box deselected.
Save Password	Select this check box to save the mSync username and password.
Server	IPaddress:port
Proxy	Select this check box if appropriate.
Palm.net	Select this check box if you want to synchronize your Palm handheld using a network.
Forced	N/A

## B.1.5 Step 5: Performing a Full Synchronization to Retrieve Oracle Mobile Field Service and Data

### Steps

Complete one of the following steps to perform a full synchronization:

- If you are using HotSync, do a HotSync.
- If you are using RAS/modem, tap Sync on the mSync screen.

---

---

**Note:** Repeat this step to do an incremental synchronization.

---

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## B.1.6 Step 6: Launching Oracle Mobile Field Service/Palm

Complete the following procedure to launch the Oracle Mobile Field Service application on the Palm handheld.

### Steps

1. Tap the Applications icon on the Palm handheld to display the application picker.
2. Tap the Field Service icon from the application launcher.

## B.2 Configuring the Palm Handheld for RAS or a Modem

In addition to using the HotSync option to synchronize Oracle Mobile Field Service/Palm and the database, Remote Access Server (RAS) or a modem can also be used to synchronize.

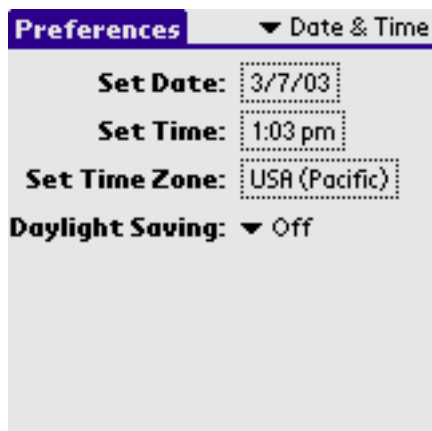
### B.2.1 Connecting to a RAS Client

To configure HTTP as the transport mechanism for Palm OS 3.5, use the following procedure:

#### Steps

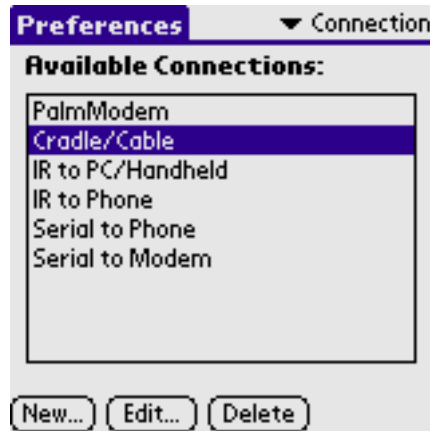
1. From the Palm handheld desktop, tap the **Prefs** icon.

The Preferences screen opens, displaying the date and time.



2. From the drop-down list, select **Connection**.

The Preferences screen displays a list of available connections.



3. Tap **New**.  
The Edit Connection screen opens.
4. Enter the following:
  - Name: HTTP
  - Connection Method: Serial to PC
5. Tap **OK** to close the Edit screen.
6. Tap **OK** to close the Preferences screen.
7. Select **Network** from the menu.  
The Preferences screen opens.
8. For each field, enter the value as indicated in the following table:

Field	Value
Service	Windows RAS
User Name	User name
Password	User password
Connection	HTTP
End	No information required

9. Tap the **Details** button.

The Details dialog box opens.

10. Make sure that IP Address: Automatic is selected.

11. Tap the **Script** button.

The Log in Script dialog box opens.

12. For each field, enter the value as indicated in the following table:

Field	Value
Send CR	no information required
Delay	1
Send	CLIENT
Wait For	CLIENTSERVER
End	no information required

13. Tap the **OK** button to close the Log in Script dialog.

14. Tap the **OK** button again to close the Details dialog.

15. Place the Palm handheld in the HotSync cradle.

16. Tap the **Connect** button to test the connection.

If the PPP connection is successful, the Palm handheld is ready for data synchronization.

## B.2.2 Connecting to a Wired Modem

Use this procedure if you are connecting to a wired modem.

### Steps

1. Tap the Applications picker.

2. Tap **Prefs**.

3. In the Preferences screen of the Palm handheld, select **Modem** from the menu.

The Preferences screen opens.

4. Verify that the speed is set to 19200 bps.

5. Select **Network** from the menu.

The Preferences screen opens.

6. For each field, enter the value as indicated in the following table:

Field	Value
Service	Windows NT RAS
User Name	The user's name
Password	The user's password
Phone	Telephone number of modem to dial

7. Tap the **Details** button.

The Details dialog box opens.

8. Ensure that the Connection Type is set to PPP.  
 9. Ensure that the Query DNS is selected.  
 10. If the Palm does not locate the correct database, enter the Primary DNS and Secondary DNS of the RAS system.  
 11. Ensure that for IP Address: Automatic is selected.

12. Tap the **Script** button.

The Log in Script dialog box opens.

13. For each field, enter the value as indicated in the following table:

Field	Value
Send CR	No information required
Delay	1
Send	CLIENT
Wait for	CLIENTSERVER
End	No information required

14. Tap **OK** to close the Log in Script dialog box.  
 15. Tap **OK** again to close the Details dialog box.  
 16. Place the Palm handheld in the HotSync cradle.

17. Tap the **Connect** button to test the connection.

If the PPP connection is successful, the Palm handheld is ready for data synchronization.

## B.3 Using Windows NT RAS

This section describes how to configure Windows NT RAS and then establish a RAS user account.

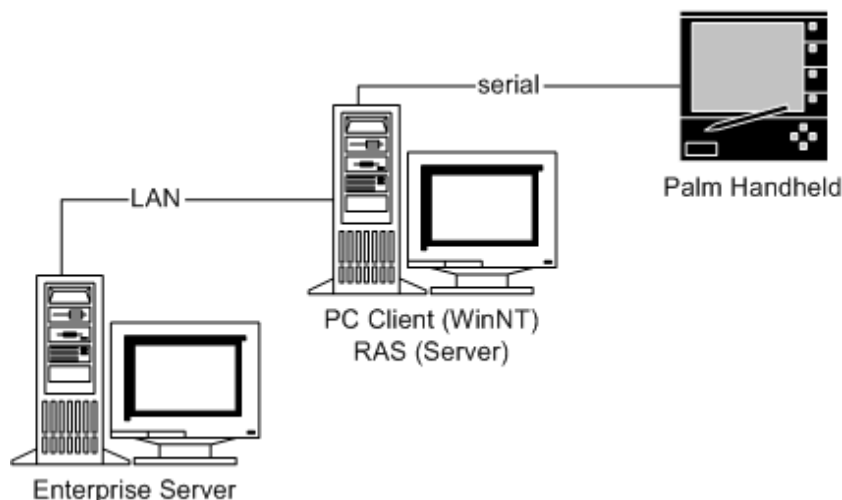
### B.3.1 Configuring Windows NT RAS

Replicating with the Palm Computing Platform using Scout or HTTP requires the TCP/IP communication protocol. Oracle Mobile Field Service uses serial lines for connection to the network. This section provides instructions for enabling TCP/IP communications for Palm handhelds using Windows NT RAS.

Perform this procedure to enable TCP/IP communications between handheld devices and your Windows NT server using Windows NT RAS.

The following figures show the architecture that can be used by the Field Service representative to synchronize data between the Palm handheld and the Mobile Server, either at home or in the office.

The following illustration shows the most direct connection of a Palm handheld with the Mobile Server, where a serial connection connects the Palm handheld with the Mobile Server, and a LAN connection connects the Mobile Server with the enterprise server.

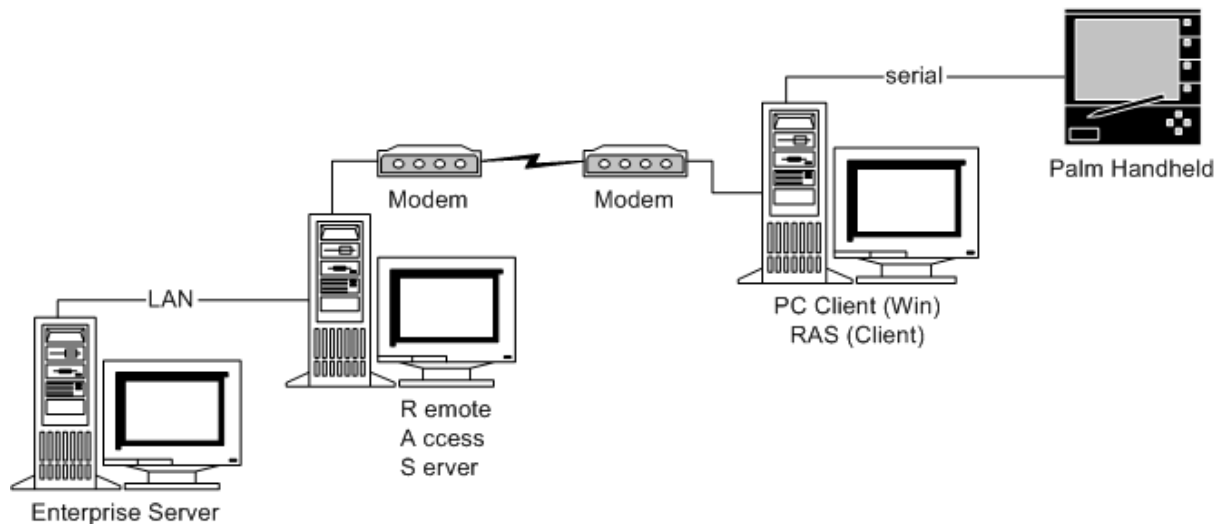


This connection requires the following setup steps:

- Setting up a RAS server.

- Creating a RAS user account for the Palm handheld.
- Configuring the Palm handheld (connected to a PC client).

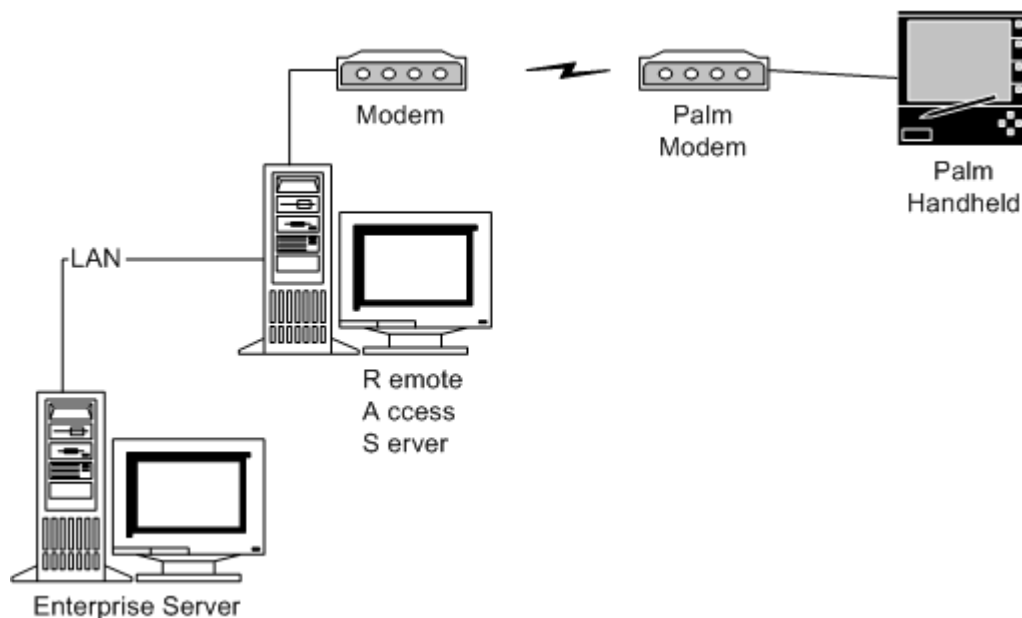
The following illustration shows another possible connection scenario, where a serial connection connects the Palm handheld with a PC client, a modem connection connects the PC client with a Remote Access Server, and a LAN connection connects the Remote Access Server with the enterprise database.



This connection requires the following setup steps:

- Setting up a RAS server.
- Creating a RAS user account for the Palm handheld.
- Setting up the Palm handheld (connected to a RAS client).

Another way to connect the Palm handheld is shown in the next illustration, where the Palm handheld has its own modem that connects to the modem of the RAS. This is a valid setup when the field service representative is on duty in the field.



This connection requires the following setup step:

- Setting up the Palm handheld (connected to a wired modem)

### Prerequisites

- Request a TCP/IP address range equal to the number of clients plus 1. Typically, one Palm handheld is connected to the COM port; therefore, the End address will be one number higher than the Start address.
- You must make sure that the TCP/IP addresses are not already in use by other computers in your network.

### Steps

1. In the Windows Control panel, double-click the **Network** icon.
2. Click **Add** in the Services tab of the Network window.
3. Select **Remote Access Service** and then click **OK**.
4. Insert the Windows NT CD-ROM into the CD-ROM drive and specify the location where you want the setup program to search for existing Windows NT RAS files.

5. Click the **Continue** button.

The setup program copies the Windows NT RAS files into the appropriate directories. If the setup program fails to detect a modem, it prompts you to add a modem.

6. Click the **Yes** button and enter the required information to install a modem.

The Add RAS handheld window opens.

7. Select **COM1-Dial-Up Networking Serial Cable** from the drop-down list.

If no COM1-Dial-Up Networking Cable option is available from the drop-down list, perform the following steps to add it.

- a. Click **Install Modem**.

The Install New Modem dialog box opens.

- b. Select the Don't detect my modem check box.

- c. Select **Dial-Up Networking Serial Cable**.

- d. Select the port on which the Palm handheld is connected.

- e. Click **Next**.

- f. Click **Finish** to leave the Install New Modem dialog window and return to the Add RAS Device window and select the option from the drop-down list.

8. Click **OK**.

The Remote Access Setup window opens.

9. Under Port, select **COM1** and then click **Configure**.

The Configure Port Usage window opens.

10. Select the Receive calls only radio button and then click **OK**.

11. Click **Network** in the Remote Access Setup window.

The Network Configuration window opens.

12. Select **TCP/IP** and click the **OK** button.

The RAS Server TCP/IP Configuration window opens.

13. Select **Entire Network** and **Use Static Address Pool**.

14. Specify the requested range of TCP/IP addresses for multiple devices. Enter the beginning of the TCP/IP address range in the **Begin** field and enter the ending of the TCP/IP address range in the **End** field.

If you have fifty devices, for example, you could define the following range:

Begin: 10.1.0.1

End: 10.1.0.51

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**Note:** Use the requested range of TCP/IP addresses compliant with your own network. Do not use the above example.

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15. Click **OK**.
16. In the Network Configuration window, select **Any Authentication Including Clear Text** and then click **OK**.  
The **Remote Access Setup** window opens.
17. Click **Continue**.  
The Setup Message window opens.
18. Click **OK**.  
The Network window opens.
19. Click **Close**.  
The Network Settings Change window opens.
20. Click **Yes** to restart the system.  
When the system is restarted and you have logged in again, an error message might appear, saying that HotSync manager is unable to open COM1. Ignore this error message.
21. After the system reboots, click the **Services** icon in the Windows Control Panel.  
The Services window opens.
22. Select **Remote Access Server** and click the **Startup** button.
23. Select **Automatic** and click the **OK** button.
24. Click the **Close** button.
25. Log on as a local administrator.

26. From the Windows Start menu, select **Administrative Tools** and then select **User Manager**.

The User Manager window opens. Proceed to "[Creating a RAS User Account for the Palm Handheld](#)" on page B-16

### B.3.2 Creating a RAS User Account for the Palm Handheld

Once you have configured Windows NT RAS, you need to establish a RAS user account.

#### Steps

1. Log on locally to your own system, not to the network, as administrator.
2. Select **New User** from the User menu.  
The New User dialog box opens.
3. Enter a user name, password, and password confirmation in the required fields.
4. Select the **Password Never Expires** check box.
5. Click **Dial-In**.  
The Dial-In Information dialog box opens.
6. Select **Grant Dial-In Permission to User** and then click **OK**.
7. Click **OK** to exit the New User dialog box.
8. Exit the User Manager screen.
9. From the Windows Start menu, select **Administrative Tools** and then select **Remote Access Administration**.  
The Remote Access Admin window opens.
10. Verify that the new RAS user is granted remote access permission and then click **OK**.

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# Installing Oracle Mobile Field Service/Pocket PC

This appendix describes how to install Oracle Mobile Field Service onto a Pocket PC.

## C.1 Installing the Application on Your Pocket PC

For the minimum software and hardware requirements for the a Pocket PC, see "[Minimum Software Requirements](#)" on page 2-1 and "[Minimum Hardware Requirements](#)" on page 2-3.

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

Procedure	Performed At
1. <a href="#">Downloading and Installing the Oracle9i Lite Setup Program</a>	Client PC (the PC that the Pocket PC HotSyncs to)
2. <a href="#">Performing a ActiveSync to put Oracle9i Lite Components, Oracle Mobile Field Service, and the Database on the Pocket PC</a>	Pocket PC
3. <a href="#">Configuring mSync on the Pocket PC</a>	Pocket PC
4. <a href="#">Performing a Full Synchronization to Retrieve Oracle Mobile Field Service and Data</a>	Pocket PC
5. <a href="#">Launching Oracle Mobile Field Service</a>	Pocket PC

## C.1.1 Downloading and Installing the Oracle9i 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 Windows CE 3.00 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**.

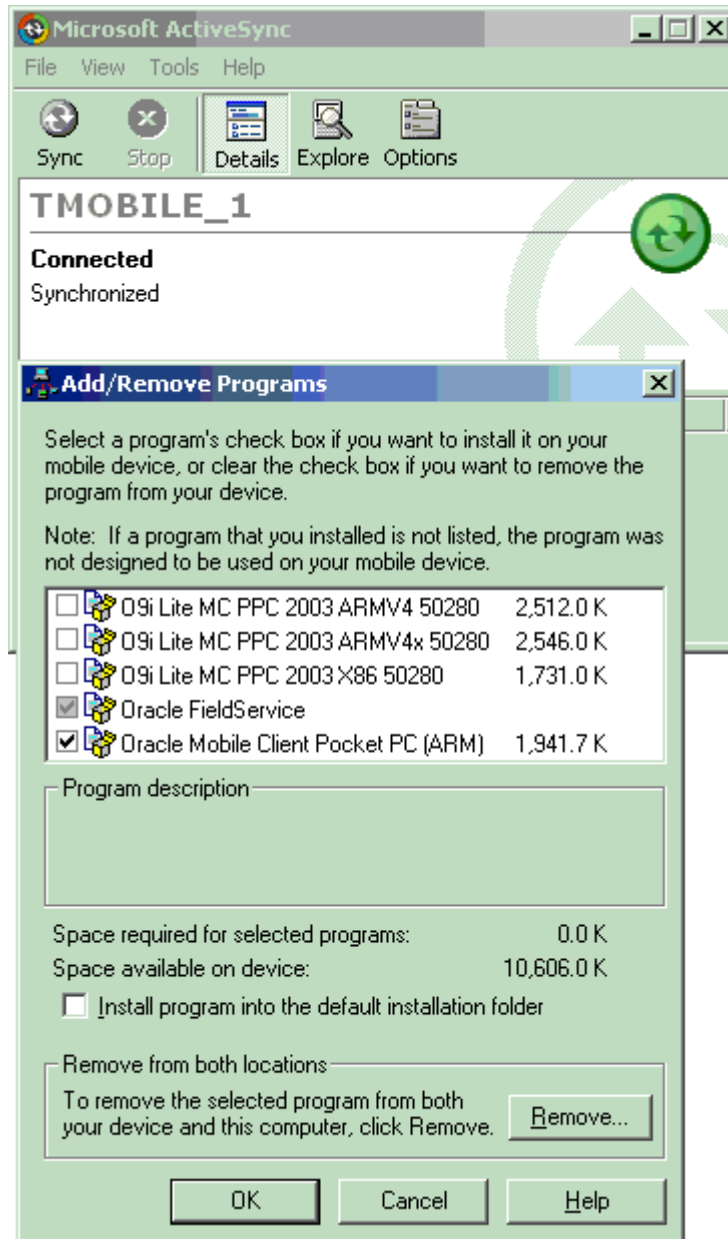
The Setup program downloads all the required components.

## C.1.2 Performing a ActiveSync to put Oracle9i Lite Components, Oracle Mobile Field Service, and the Database on the Pocket PC

### Steps

1. Connect the device to the Client PC.
2. If you have not installed the Microsoft ActiveSync, install it and rerun the setup program.
3. Start Microsoft ActiveSync and then install Oracle9i Lite.

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



4. Perform an ActiveSync to put Oracle9i Lite components on the Pocket PC.

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**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.

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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

### C.1.3 Configuring mSync on the Pocket PC

Follow this procedure to install the Oracle Mobile Field Service 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. For each field, enter the value as indicated in the following table and then tap **Apply**:

Field	Value
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	Leave this check box deselected.
Save Password	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.

## C.1.4 Performing a Full Synchronization to Retrieve Oracle Mobile Field Service and Data

### Steps

Complete the following steps to perform a full synchronization:

1. Make sure 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.

### C.1.5 Launching Oracle Mobile Field Service

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

#### Steps

1. On the pocket PC device, 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.

### C.1.6 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 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.

## C.2 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.



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# Setting Up Debrief Reporting

This appendix describes how to set up the debrief reporting in the Oracle Mobile Field Service applications.

You can set material and expense items to any billing type using billing categories. These billing types are mapped to either the material, labor or expense billing categories. Transaction types are then mapped to billing types and transaction types are then linked to business processes. Refer to the *Oracle Field Service Implementation Guide* for more details.

## D.1 Set Up Billing Types and Service Activity Codes

In previous releases of Field Service Debrief, billing types were limited to 'L' (labor), 'M' (material) and 'E' (expense), which prevented customers from creating different coverage based on the specific details of an item. For example, a customer might want to have different coverage on an item that is consumable rather than a non-consumable item. These categories also determine which tab on the Debrief window the item should appear: Expense, Labor, or Material.

In this release, a new 'billing category' has been added in Service core that allows users to differentiate the billing types into categories of (Material) 'M', (Labor) 'L' and (Expense) 'E'. These billing categories, which are seeded, will be required along with billing type before the billing type is attached to a service activity code. As such, billing types are user extensible and can represent the various business needs that might arise in your enterprise.

### D.1.1 Defining Billing Types

You can define billing types to fit your business needs, which you can associate to billing categories and service activity codes. The three seeded billing types are Labor, Expense, and Material. Each of these billing types is associated with the

related billing category of the same name. When you create new billing types, they can be associated with either the Expense or the Material billing category. You cannot associate extensible user-defined billing types with the Labor category. Billing types are associated with Service Activity Codes and they are also associated with items, which you set up in Oracle Inventory.

### **Prerequisites**

None.

### **Responsibility**

Field Service Manager

### **Navigation**

Field Service Dispatcher > Service Request > Others > Service:  
Lookups

### **Steps**

1. From the Oracle Service Lookups window, choose Find from the View menu and then query the following lookup: MTL\_Service\_Billable\_Flag.  
The Meaning, Application, and Description are defaulted in. The Access Level is set at Extensible.
2. To create a new lookup, insert a record (Ctrl + down arrow) and enter a code for the new billing type in the Code field.
3. Enter the name of the billing type in the Meaning Field.
4. Optionally, enter a Description.
5. Leave the Tag field blank. It is not used in this lookup for Field Service.
6. Enter an Effective From date. This is the date that the billing type becomes active.
7. Optionally, enter an Effective To date.  
If you want to deactivate a Billing Type, enter an end date that corresponds with the day you want the billing type to become inactive.
8. Check the Enabled check box.
9. Repeat steps 2 through 8 for each new billing type you want to create.
10. Save your work.

## D.1.2 Setting Up Billing Type Attributes

When you create billing types, you must associate them with billing categories to ensure that the lookups appear in on the appropriate tab in the Debrief window. The new extensible billing types will either be categorized as Material, if you want them to appear in the Materials Tab, or Expense, if you want them to appear in the Expense tab.

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**Note:** You cannot create extensible billing types for the Labor tab in debrief. You must only use the seeded billing type 'Labor' for Service Activity Codes associated with this billing type.

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Those billing types of category Material also are used by Spares Management and can be tracked in Install Base.

When you set up your billing types and associated them with the appropriate category remember that these billing types will be associated with Service Activity Codes, which will appear as options in the Material or Expense tab of Debrief.

### Prerequisites

Billing types must be set up.

### Responsibility

Field Service Manager

### Navigation

Field Service Dispatcher > Service Request > Setup > Charges > Billing Type Attributes

### Steps

1. In the Billing Type window, create a new record and in the Billing Type field, choose a billing type from the list of values.
2. In the Category field, choose a category to associate your billing type with from the list of values.

The options are: Material or Expense.

3. Enter a start date.

4. Optionally, enter an end date. To keep the lookup active indefinitely, leave this field blank.
5. If you want to associate this Billing Type with a specific item in Inventory, select the item in the Rollup Item field.
6. Repeat steps 1 through 5 for each billing type you want to associate with a category.
7. Save your work.

### D.1.3 Setting Up Service Activity Codes

You must create the service activity codes that you want to appear in the lookups on the Material, Labor and Expense tabs of Field Service Debrief. All activities that a field service representative logs in Debrief must have a related service activity code. These are extensible. The service activity codes are filtered by the billing type and associated category that you link to them. For example, a service activity code with a billing type of "Material" will only appear in the lookup on the Material Tab of the Debrief window.

Service activity codes must be categorized to represent either "issued items," or those items that are going to a customer, or as "returned items," or those items that are being retrieved from the customer.

#### **Prerequisites**

Billing types and billing attributes must be set up.

#### **Responsibility**

Field service manager

#### **Navigation**

Field Service Dispatcher > Service Request > Setup > Charges > Service Activities and Billing Types

#### **Steps**

1. In the Service Activities block of the Service Activities and Billing Types window, create a new record (CTRL + down arrow).
2. In the Service Activity field, enter the name of the service activity code you want to create.
3. Optionally, enter a description of the service activity code.

4. In the Line Category field, choose whether the service activity code is to be of type "Order" or type "Return."
5. Enter a start date.
6. Optionally, you can enter an end date.  
If you do not specify an end date, the service activity code will be open-ended.
7. In the Billing Types block, choose the Billing Type that you want to associated with service activity code that you just created from the list of values.  
The description defaults from the billing type and the Start Date defaults to the current date.
8. Repeat step 7 for each billing type you want to associate with the service activity code.
9. In the Order Management Header and Line Type block, choose the operating unit you want to associated with the service activity code.
10. In the Order Type field, choose **Mixed** from the list of values.
11. In the Line Type field, choose **Standard** from the list of values.

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**Note:** The Order Type and Line Type settings are not restricted to the values noted above. You can use any type as long as it is set up correctly in Order Management. For more information, see the *Oracle Order Management User Guide*.

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12. Save your work.

## D.1.4 Setting Up Material Service Activity Codes in Install Base

All service activity codes that are categorized with a billing type and category of "Material" must be set up in Install Base. The reason for this is these service activity codes are related to items that are trackable in Install Base. Service activity codes with both line types of "Order" and "Return" must be added to the Install Base.

### Prerequisites

Service activity codes of type "Material" must be set up.

### Responsibility

Field service manager

## Navigation

Field Service Dispatcher > Service Request > Setup > Charges > Install Base Transaction Types

## Steps

1. When the Transaction Sub Types window opens, select the Service Type flag.  
This flag will enable you to access only Service Transaction Types among the list of values in the Name field.
2. Query on the name of the service activity codes that you created in the Service Request fields and select one that you created with a billing category of "Material."
3. In the Source Info area, select the Reference Required check box if you want to include trackable items.
4. Select the Change Owner check box.
5. If the Service Activity Code has a line type of "Order," then choose **External** in the Change Owner drop-down list. If the Service Activity Code has a line time of Return, then choose **Internal** in the Change Owner field.
6. Choose a status for the source.  
Do not select a status that will reflect the source as inactive, such as "Terminated" or "Expired."
7. In the Source Transaction Types area, set up lines for the Field Service and Order Management application. Select each from the list of values in the Application Name field.  
The Field Service line will default the values in the Transaction Name, Transaction Type, and Description fields.
8. For the Order Management line, select **Order Management Ship/Fulfill** in the Transaction Name drop-down list.  
The Transaction Type and Description fields are defaulted.
9. For both lines, select the Update IB check box to include trackable items in your setup.
10. Save your work.

## D.1.5 Mapping Service Activity Codes to a Business Process

Within the Oracle E-Business Suite, there may be several applications that use service activity request functionality. You can map the same service activity code to multiple business processes through this process.

You must create new business processes and then map them to the appropriate service activity code. See the *Oracle Field Service Implementation Guide* for a complete description of this procedure.

### Prerequisites

A business process and service activity codes must be set up.

### Responsibility

Field service manager

### Navigation

Field Service Dispatcher > Service Request > Setup > Charges > Service Business Process

### Steps

1. From the Service Business Process form, switch to query mode and search for the business process you want to associated the service activity code with in the Name Field.  
For example, Field Service.
2. Select the Field Service check box.  
The Service Request check box is selected by default. If you want to enable Depot Repair you can select the check box as well.
3. Optionally, enter an effective date range.  
If you leave these fields blank, the mapping will remain open ended.
4. In the Service Activities block, select the Service Activity Code you want to map to the Field Service business process from the list of values in the Service Activity field.
5. Repeat step 4 for each service activity code you want to map to the business process.
6. Save your work.



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# Setting Up for Install Base Transactions

This appendix describes the install base setup procedures for the Oracle Mobile Field Service applications.

## E.1 Setting Up System Items for Install Base Transactions

### Steps

Complete the following steps to set up system items for install base transactions:

1. Log in to the Forms application using the responsibility Inventory.
2. Create a miscellaneous transaction, putting the item in a Subinventory.
3. Navigate to Setup > Organizations > Subinventories.
4. Create at least one Subinventory in the Service Master Organization.

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

5. In the same organization as the Subinventory of the Mobile Resource, create system items that are one of the following:
  - Transactable (Inventory tab page)
  - Trackable (Inventory tab page)
  - Serviceable (Service tab page)
  - Of type Material (Service tab page)
6. Put the Trackable Item you defined above in your good Subinventory (using Miscellaneous Transactions). Also put a Non-Trackable Item there. The

Trackable Item should be created as an Install Base product instance in the back end.

7. Under the responsibility Field Service Manager, navigate to Spares Management > Setup > Resource Addresses and Subinventories.
8. Create a new record for your Mobile Resource by entering its name. Assign a Primary Address and the two Subinventories you created to it.
9. The condition of the Subinventory in the Master Organization should be set to Defective and the condition of the Palm Organization Subinventory should be set to Usable.

## E.2 Setting up Install Base Profile Options

Set up profiles as indicated in the following table:

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

Adjusting transaction types so they can be used for install base updates can be done under the responsibility Installed Base Admin and navigating to Setups > Transaction Types and Sub Types. Transaction types can be used for removing install base products by setting the Change Owner To field in the Source Info section of the form to Internal. By setting this field to External, the transaction type can be used for installing new install base products.

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

Whether an install base update is done when removing a part in an Oracle Mobile Field Service application depends on the selected transaction type when doing a material transaction.

If the `Change Owner To` value of the selected transaction type is set to `Internal`, then the install base product to be removed can be indicated in Oracle Mobile Field Service/Laptop.

If the `Change Owner To` value is set to `External`, then a trackable product can be indicated from a usable subinventory. An install base product will be created upon debriefing the material transaction in Field Service Report with the `Update Installed Base` check box selected.



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## Setting Up State Transitions

### F.1 Setting Up Task Status Transitions

#### Steps

Complete the following steps to set up task status transitions:

1. Switch to the Field Service Manager responsibility.
2. Navigate to **Field Service Setup > CRM Foundation > Task and Escalation Manager > Setup > Define Task Status.**

The Task Statuses form displays.

3. Click the **Define Transition** button to display the Status Transitions form.
4. On the Rule tab, select **Task State Transition** for the Source field, **Field Service** for the Application field, and **Field Service** for the Rule Name field.
5. Verify that the Field Service status rule is correct.

The seeded Field Service status rule is defined in the following table:

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

<b>Current State</b>	<b>Next State (Cont.)</b>
Assigned	Working
Accepted	Rejected
Accepted	Cancelled
Accepted	Working
Rejected	Assigned
Rejected	Accepted
Rejected	Cancelled
Rejected	Working
Cancelled	In Planning
Cancelled	Assigned
Cancelled	Closed
Completed	Closed
Working	Cancelled
Working	Completed
Working	Interrupted
Interrupted	In planning
Interrupted	Assigned
Interrupted	Cancelled
Interrupted	Completed
Interrupted	Working
Unassigned	In Planning
Unassigned	Assigned
Unassigned	Cancelled

## F.2 Assigning the State Transition Rule to a Responsibility

### Steps

Complete the following steps to assign the state transition rule to a responsibility:

1. Click the Responsibility tab.
2. Select a responsibility in the Responsibility field.
3. Assign the rule to the responsibility by selecting the rule name in the Rule field.
4. Save your work.
5. Close the form.



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## Setting Up Spares Management in Oracle Mobile Field Service

This appendix describes the ordering and transferring of spare parts and setting up resource addresses and subinventories in Oracle Mobile Field Service.

### G.1 Ordering and Transferring Parts

To create an item order in an Oracle Mobile Field Service application, at least one usable (good) subinventory has to be defined and assigned to the field service representative. Two usable subinventories have to be defined and assigned to the field service representative in order to do transfers.

Subinventories are set up using the Field Service Administrator responsibility and the Resource Addresses and Subinventories form, which you can access from the following path:

Field Service Dispatcher > Spares Management > Setup >  
Resource Addresses and Subinventories

## G.2 Setting Up Resource Addresses and Subinventories

When ordering an item, resource addresses can be used by the field service representative to indicate where the item should be sent.

### Prerequisites

- Use the Field Service Administrator responsibility and open the Resource Addresses and Subinventories form. See "[Ordering and Transferring Parts](#)" on page G-1 for complete details.

### Steps

From the Resource Addresses and Subinventories form, complete the following steps to set up resource addresses and subinventories:

1. Type a resource type and name in the Resource Type and Resource Name fields.
2. Enter resource addresses.
  - a. From the Addresses tab, enter the address style in the Style field and then click the Address field.
  - b. In the Location Addresses form, enter the location address details and click **OK**.  
The form closes.
  - c. Enter the time zone in the Time zone field.
  - d. If the entered address should be the primary address, then select the Primary check box.
  - e. To deactivate an address, select the appropriate Inactive check box.
3. Assign subinventories.
  - a. Enter the organization in the Organization field.
  - b. Enter the subinventory in the Subinventory field
  - c. From the Condition drop-down list, select **Usable**.
  - d. If the entered Subinventory should be the default Subinventory for the Mobile Resource, then select the Default check box.
  - e. Optionally, set the period for which the subinventory is valid in the Start Date and End Date fields.

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## Setting Up Descriptive Flexfields

This appendix describes how to set up descriptive flexfields in an Oracle Mobile Field Service application. Refer to the *Oracle Applications Flexfields Guide* to learn more about descriptive flexfields.

### Steps

Complete the following steps to set up the descriptive flexfields in Oracle Applications that are specific to an Oracle Mobile Field Service application:

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

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

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

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

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# Signature Capture

A field service representative can capture the signature of a customer after performing the debrief on the Palm handheld or Pocket PC. The signature is then synchronized with the enterprise system.

You can view a captured signature in the appropriate debrief screen of the Forms application. Viewing a signature in the Debrief form is exactly the same as viewing any other attachment.

On the toolbar, there is a paper clip icon. When you select an attachment linked to the Debrief, the icon changes to a paper clip attached to a yellow document.

If the attachment viewer in the Forms application is not working, then check that the entries in `wdbserver.app` (found in the Forms tier setup) are similar to the following:

- `connect_string = mobxbld1`
- `password = apps`
- `username = apps`
- `default_page = APPS.fnd_web.ping`
- `document_table = APPS.fnd_lobs_document`
- `document_path = docs`
- `document_proc = (null)`
- `name_prefix = (null)`
- `always_describe = (null)`
- `after_proc = (null)`
- `before_proc = (null)`

- 
- reuse = YES
  - connmax = 30
  - upload\_as\_long\_raw = (null)
  - upload\_as\_blob = \*
  - pathalias = fndgfm
  - pathaliasproc = fnd\_gfm.dispatch

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## Process Flow

This appendix describes the typical field office work flow (Oracle Field Service) and the typical field service representative work flow (Oracle Mobile Field Service).

### J.1 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 field service representatives receive an assigned task or schedule, they can begin service at the customer site. They report on progress, materials used and recovered, expenses, and labor time. Additionally, they can record counter readings and describe how the problem was resolved. It might be necessary to create new tasks or service requests if the field service representative cannot help the customer immediately. They can recover the product or product part for repair. All the reported information is used for billing the customer. Reporting on materials-used also results in automatic replenishment of the inventory in the service vehicle.
5. Service request monitoring	Unforeseeable events can occur that impact the progress of a task. In this case, escalations can be raised to indicate this situation.
6. Service request completion and billing	When field service representatives complete a task, they sets the task status as COMPLETE and then move on to the next task. The task information is checked by an agent at the home office for any service contract coverage and then an invoice is created. The inventories, sub-inventories, and install base are all updated.

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

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

## J.2 Various Orders of Task Completion

Field service representatives can complete their scheduled tasks under different scenarios.

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

In this scenario, the field service representative works on one job at a time and conforms to the dispatched schedule. For instance, the following tasks may be assigned to a field service representative:

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

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

### **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 need not conform to the dispatched schedule.

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

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

Scenario 2 and Scenario 3 gives field service representatives control over their day. The dispatcher sends the tasks and locations to the field service representative, and the service representative then decides when to perform each task. This scenario works well in an environment where each task requires only one field service representative. For example, if a field service representative has a dental appointment, he can arrange the time he wants to be at the customer site near his

dentist. 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.

### **J.3 Avoiding Multiple Task Assignments**

If you send more than one field service representative to perform a task, ensure 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 all three representatives. It now appears on their schedules. However, if one of your field service representatives changes the time for his task, that would affect the schedules of the other two representatives. To avoid this, you must create three tasks, one for each representative.

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## Category Set for Item Replication

The following system items are replicated to mobile computer devices:

- Items used in a service request assigned to/created by the mobile user
- Item instance items used in a service request assigned to/created by the mobile user
- Items used in debrief lines
- Items used in item orders
- Items present in a good subinventory assigned to the mobile user
- Items present in the inventory organization specified by profile CSL\_APPL\_ORGANIZATION\_ID.

For Oracle Mobile Field Service/Laptop, set the following profiles to filter the system by category:

- CSL: Item Category Filter
- CSL: Item Category Set Filter

See ["Setting up Profile Options for Oracle Mobile Field Service/Laptop"](#) on page 3-7 for a complete description of these profiles.

For Oracle Mobile Field Service/Palm or Oracle Mobile Field Service/Pocket PC, set the following profiles to filter the system by category:

- CSM: Item Category Filter
- CSM: Item Category Set Filter

See ["Setting up Profile Options for Oracle Mobile Field Service/Palm"](#) on page 3-13 or ["Setting up Profile Options for Oracle Mobile Field Service/Pocket PC"](#) on page 3-15 for a complete description of these profiles.

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

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**Note:** You can set the category profiles for the Oracle Mobile Field Service applications at all levels.

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

- If the category profile is not set (no category is entered), then all items related to the default inventory organization are replicated to the mobile clients
- If the category profile is set (category is entered), then the system items replicated are filtered based in inventory organization and category.
- Items used in a service request created on the backend will not be impacted by this profile. But for service requests that the field service representative wants to create on a mobile computer device the category profile will limit the list of items available.
- The category profile does not affect the OnHandQty (stock in subinventory).

If profiles `CSL_ITEM_CATEGORY_SET_FILTER` and `CSL_ITEM_CATEGORY_FILTER` are also both set, an additional filter on the item category/category set combination applies.

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

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# National Language Support

This appendix describes how to use National Language Support (NLS) to change the default language of Oracle Mobile Field Service, English, to the desired language of the user.

The profile option `ICX: Language` determines the language in which field service representatives receive data, messages, and labels for Oracle Mobile Field Service/ or Oracle Mobile Field Service/Palm.

As a prerequisite, install the NLS language for the Oracle E-Business Suite and then apply all patches in the NLS language when applicable.

From the Forms application, complete the following steps to change the default language of Oracle Mobile Field Service:

1. Change the profile `ICX: Language` to the desired language.
  - a. Login with System Administrator responsibility.
  - b. Navigate to Profile / System.
  - c. Check the User check box and then enter the username.
  - d. Enter the Profile option name, `ICX: Language`, and then click **Find**.
  - e. Change the language of the user level.
2. Run the Manage Mobile Users concurrent program (if it is not scheduled).
  - a. Login with Mobile Administrator responsibility.
  - b. Navigate to Concurrent / Requests.
  - c. Click **OK** to submit a single concurrent request.
  - d. Choose the Manage Mobile Users concurrent program from the list of values.

---

e. Click **OK**.

The Manage Mobile Users concurrent program detects the language change and then removes all records in the old language and insert them in the new language. This in turn, causes a full synchronization. After this synchronization, the user sees the application and data in the new language.

Oracle9i Lite can only use one language code set at a time. Oracle9i Lite has five sets of client libraries, one for each language (encoding). English/Western European, Japanese, Korean, Traditional Chinese, and Chinese are supported. When the Oracle9i Lite Mobile Server is installed, it will only install one set of client libraries. Therefore, an additional mobile server installation is required for every language if it uses a different code set. The administrator has to setup different URLs for each language. For example, the URL for English is the following:  
`server/webtogo/setup_eng.htm`, `server/webtogo/setup_jp.htm`. Users have to be informed of which URL they should use, based on the language they want.

As long as the languages use the same code set (such as English and Spanish), only one mobile server is required, as explained earlier.

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# Index

## A

---

ActiveSync 3.6, 2-2  
Advanced tab, 4-3  
Apache, 4-7  
Application modules  
    Oracle Application Foundation  
        components, 1-3  
    Oracle Install Base, 1-3  
Applications icon, B-5  
Applications picker, B-8  
architectures  
    CRM Gateway for Mobile Devices, 1-11  
    Mobile Application Foundation, 1-11

## B

---

Basic tab, 4-3  
Bypass Proxy for Local Addresses check box, A-3

## C

---

Change check box, B-4, C-5  
Change Owner check box, D-6  
check boxes  
    Bypass Proxy for Local Addresses, A-3  
    Change, B-4, C-5  
    Change Owner, D-6  
    Default, G-2  
    Depot Repair, D-7  
    Don't detect my modem, B-14  
    Enabled, D-2  
    Field Service, D-7  
    Force Refresh, C-5

Forced, B-4  
Freeze Flexfield Definition, H-2  
Inactive, G-2  
Palm.net, B-4  
Primary, G-2  
Proxy, B-4  
Reference Required, D-6  
Required, H-2  
Save Password, B-4, C-5  
Service Request, D-7  
Update IB, D-6  
Use Proxy, C-5  
User, L-1

COM1, B-15  
COM1-Dial-Up Networking Cable option, B-14  
Computer Telephone Integration (CTI), J-1  
conshttp\_reg.exe, B-3  
CRM Gateway for Mobile Devices  
    architecture, 1-11  
CRM System Administrator Console, 4-2, 4-7  
CRM Technical Foundation, 4-7  
CSE  
    Bypass Event Queue profile, E-2  
    Miscellaneous Issue to Project Transaction Type  
        profile, E-2  
    Miscellaneous Receipt From Project Transaction  
        Type profile, E-2  
    PA Expenditure Type profile, E-2  
CSL  
    Item Category Filter profile, K-1  
    Item Category Set Filter profile, K-1  
CSL: Item Category Filter profile, 3-8  
CSL: Laptop Inventory Organization profile, 3-8  
CSL:Item Category Set Filter profile, 3-8

CSL: Number of IB Items at Location profile, 3-8  
CSM

Item Category Filter profile, K-1

Item Category Set Filter profile, K-1

CSM TYPE3 processes, 3-20

CTI, J-1

## D

---

Default check box, G-2

Depot Repair check box, D-7

Diagnostics Framework, 4-3

Diagnostics tab, 4-2

DNS

Primary, B-9

Secondary, B-9

Don't detect my modem check box, B-14

## E

---

Enabled check box, D-2

enterprise server, B-11

enterprise system, 3-20

## F

---

Field Service Administrator responsibility, G-1

Field Service check box, D-7

Field Service Dispatch Center, 3-21

Field Service icon, B-5

Field Service Manager responsibility, 3-3, E-2, F-1

field service representative (FSR), 1-1

Fieldservice.exe, C-6

File Explorer icon, C-4, C-6

files

Fieldservice.exe, C-6

Force Refresh check box, C-5

Forced check box, B-4

forms

Location Addresses, G-2

Resource Addresses and Subinventories, G-1,  
G-2

Forms application, 3-7, 4-2, E-1, I-1

Inventory tab page, E-1

Service tab page, E-1

Freeze Flexfield Definition check box, H-2  
FSR, 1-1

## G

---

guides

*Installing Oracle Applications*, 2-1, 2-3

*Mobile Applications: Patch Information*  
document, 2-4, 3-2

*Oracle Applications CRM System Administrator's*  
*Guide*, 4-3, 4-7

*Oracle Applications Flexfields Guide*, H-1

*Oracle Applications System Administrator's*  
*Guide*, 3-19, 3-20

*Oracle Field Service Implementation Guide*, 1-2,  
3-4, 3-20, D-1, D-7

*Oracle Mobile Application Foundation*  
*Implementation and Administration Guide*, 2-1

*Oracle Mobile Application Foundation*  
*Implementation and Administration Guide*,  
Release 11.5.9, 2-3

*Oracle Mobile Application Foundation*  
*Implementation and Administration Guide*,  
Release 11.5.9, 1-2, 1-11, 3-2, 3-20, 4-2

*Oracle Mobile Application Foundation*  
*Implementation Guide*, 4-2

*Oracle Order Management User Guide*, D-5

*Oracle Service Implementation Guide*, 3-5

*Oracle Support Implementation Guide*, 3-3

*Oracle9i Lite Mobile Server Administration Guide*  
Release 5.0.2, 4-7

## H

---

HotSync cradle, B-8, B-9

HotSync Manager, 2-2, B-3

HTTP, B-3, B-6, B-7, B-11, C-4

## I

---

icons

Applications, B-5

Field Service, B-5

File Explorer, C-4, C-6

mSync, B-4

- Network, B-13
- Prefs, B-6
- Web-to-Go, A-7
- Inactive check box, G-2
- Install Tool, 2-2
- Installed Base Admin responsibility, E-2
- Installing Oracle Applications*, 2-1, 2-3
- Internet Explorer, A-2
- Inventory tab page, E-1

## J

---

### JTM

- Application Conflict Rule, 4-1
- JTM Master Concurrent Program, 3-19
- JTM: Mobile Applications Enabled, 3-13
- JTM: Application Conflict Rule profile, 3-7
- JTM: Enable Credit Card Functionality profile, 3-8
- JTM: Mobile Applications Enabled, 3-16
- JTM: Mobile Applications Enabled profile, 3-7
- JTM: Number of Previously Closed Service Requests profile, 3-8
- JTM: Synchronous Service History Collection profile, 3-8

## K

---

- knowledge base, J-2

## L

---

- Location Addresses form, G-2
- Logging screens, 4-7

## M

---

- Manage Mobile Users concurrent program, L-1, L-2
- Master Organization, E-2
- Microsoft ActiveSync, C-2
- Microsoft Internet Explorer, A-3, B-2, C-2
- Microsoft Internet Explorer, version 5.5, 2-1, 2-2
- Mobile Administrator responsibility, L-1
- Mobile Application Foundation, 3-20
- Mobile Application Foundation Administration

- Console, 4-2
- Mobile Application Foundation architecture, 1-11
- Mobile Applications: Patch Information* document, 2-4, 3-2
- Mobile Client for Laptop setup program, A-1
- Mobile Server, A-1, B-2, B-3, B-11
- MOBILE\_CON\_PROGRAM, 3-19
- mSync, B-1
- mSync client password, B-4, C-5
- mSync client user name, B-4, C-5
- mSync icon, B-4

## N

---

- National Language Support (NLS), L-1
- Network icon, B-13
- NLS, L-1

## O

---

- operating systems
  - Palm OS 3.5, 2-2, 2-3
  - Pocket PC 2000, 2-2, 2-4
  - Pocket PC 2002, 2-2, 2-4
  - Pocket PC 2003, 2-2, 2-4
  - Windows 2000, 2-1, 2-2
  - Windows ME, 2-1, 2-2
  - Windows NT 4.0 (Service Pack 5), 2-1, 2-2
  - Windows XP, 2-1, 2-2
- Oracle Applications CRM System Administrator's Guide*, 4-3, 4-7
- Oracle Applications Flexfields Guide*, H-1
- Oracle Applications System Administrator's Guide*, 3-19, 3-20
- Oracle E-Business Suite, 1-1, 2-1, D-7, L-1
- Oracle Field Service Implementation Guide*, 1-2, 3-4, 3-20, D-1, D-7
- Oracle Field Service Report, definition of, 3-4
- Oracle Field Service/Laptop responsibility, 3-7, 3-20, 3-21, 3-22
- Oracle Field Service/Palm responsibility, 3-13, 3-16, 3-20, 3-21, 3-22, 4-3
- Oracle Mobile Application Foundation Implementation and Administration Guide*, 2-1
- Oracle Mobile Application Foundation Implementation*

*and Administration Guide, Release 11.5.9,* 2-3  
*Oracle Mobile Application Foundation Implementation and Administration Guide, Release 11.5.9,* 1-2, 1-11, 3-2, 3-20, 4-2  
*Oracle Mobile Application Foundation Implementation Guide,* 4-2  
*Oracle Order Management User Guide,* D-5  
*Oracle Service Implementation Guide,* 3-5  
Oracle Support, 4-8  
*Oracle Support Implementation Guide,* 3-3  
Oracle9i Lite, C-2, C-3  
Oracle9i Lite database, A-1  
*Oracle9i Lite Mobile Server Administration Guide Release 5.0.2,* 4-7  
OracleMetaLink, 2-4, 3-2

## P

---

Palm handheld desktop, B-2, B-3  
Palm HotSync Manager, B-1  
Palm Organization Subinventory, E-2  
Palm OS 3.5, 2-2, 2-3, 4-4, B-6  
Palm.net check box, B-4  
paper clip icon, I-1  
PC client, B-12  
Pentium I processor, 2-3, 2-4  
Pocket PC 2000, 2-2, 2-4  
Pocket PC 2002, 2-2, 2-4  
Pocket PC 2003, 2-2, 2-4  
PPP connection, B-8, B-10  
PRC files, B-2  
Prefs icon, B-6  
Primary check box, G-2  
Primary DNS, B-9  
profiles  
CSE  
Bypass Event Queue, E-2  
Miscellaneous Issue to Project Transaction Type, E-2  
Miscellaneous Receipt From Project Transaction Type, E-2  
PA Expenditure Type, E-2  
CSF: Default In Planning Status, 3-4  
CSL  
Item Category Filter, K-1

Item Category Set Filter, K-1  
CSL:  
Item Category Filter, 3-8  
Item Category Set Filter, 3-8  
Laptop Inventory Organization, 3-8  
Number of IB Items at Location, 3-8

## CSM

Item Category Filter, K-1  
Item Category Set Filter, K-1

## JTM

Mobile Applications Enabled, 3-13, 3-16

## JTM:

Application Conflict Rule, 3-7  
Enable Credit Card Functionality, 3-8  
Mobile Applications Enabled, 3-7  
Number of Previously Closed Service Requests, 3-8  
Synchronous Service History Collection, 3-8

programs, 3-20

Proxy check box, B-4

## R

---

RAS, B-6, B-11, B-12

Reference Required check box, D-6

Remote Access Server (RAS), B-6, B-9, B-11, B-12  
user account, B-12

Windows NT, B-11, B-13, B-14

Required check box, H-2

Resource Addresses and Subinventories form, G-1, G-2

Resource Manager, 1-3

responsibilities

Field Service Administrator, G-1

Field Service Manager, 3-3, E-2, F-1

Installed Base Admin, E-2

Mobile Administrator, L-1

Oracle Field Service/Laptop, 3-7, 3-20, 3-21, 3-22

Oracle Field Service/Palm, 3-13, 3-16, 3-20, 3-21, 3-22, 4-3

System Administrator, H-1, L-1

Responsibility tab, F-3

## S

---

Save Password check box, B-4, C-5  
Scout, B-11  
SDK, 1-10  
Secondary DNS, B-9  
Segments form, H-2  
Segments Summary form, H-2  
service activity code, D-4, D-5, D-7  
Service Business Process form, D-7  
Service Request check box, D-7  
Service tab page, E-1  
setup.exe, A-2, C-2  
Software Development Kit (SDK), 1-10  
Start menu, A-7  
system administrator, 4-2, 4-7  
System Administrator responsibility, H-1, L-1

## T

---

### tabs

Advanced, 4-3  
Basic, 4-3  
Diagnostics, 4-2  
Responsibility, F-3  
Task Manager, 1-3  
TCP/IP, B-11  
TCP/IP address, B-13  
TCP/IP addresses, B-13, B-15  
TCP/IP communications, B-11  
Test Summary table, 4-3

## U

---

Update IB check box, D-6  
Update Installed Base check box, E-3  
Use Proxy check box, C-5  
User check box, L-1

## W

---

wdbsver.app, I-1  
Web-to-Go icon, A-7  
Web-to-Go server, A-1  
Windows 2000, 2-1, 2-2  
Windows Control panel, B-13

Windows Explorer, A-2, B-2, C-2  
Windows ME, 2-1, 2-2  
Windows NT 4.0 (Service Pack 5), 2-1, 2-2  
Windows NT RAS, B-11, B-13, B-14  
Windows NT server, B-11  
Windows Start menu, B-16  
Windows XP, 2-1, 2-2  
Workflow Background Process, 3-20

