

Oracle® Field Service

User Guide

Release 11*i*

Part No. B13768-02

March 2005

Oracle Field Service User Guide, Release 11i

Part No. B13768-02

Copyright © 2002, 2005, Oracle. All rights reserved.

Primary Author: Robert Haswell

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

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

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

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

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Contents

Send Us Your Comments

Preface

Part 1 Debrief and Dispatch Center

1 Understanding Field Service

Summary of Field Service	1- 1
Introduction to the Field Service Suite	1- 2
The Field Service Process	1- 3
Overview of Field Service	1- 8
How Field Service Relates to the E-Business Suite	1-11
What is the Field Service Dispatch Center?	1-14
What is Debrief?	1-17
What is Preventive Maintenance?	1-20
The Scheduling and Task Assignment Process	1-21
What is Spares Management?	1-29
What is the Field Service Portal?	1-36

2 Using Field Service Dispatch Center

Dispatch Center Summary	2- 1
Working with the Field Service Dispatch Center	2- 2
Finding Tasks	2- 3
Viewing Task Details	2- 5
Selecting Territories	2-10
Managing Skills and Skill Levels	2-10
Assigning Skills to Tasks	2-12
Assigning Skills to Task Templates	2-13
Access Spares Management	2-14
View Resource Addresses and Sub Inventories	2-14
View the Parts Requirement of a Task	2-15
Working with the Plan Board	2-16
Working with the Gantt	2-17
Working with the Map	2-19

Scheduling Tasks	2-20
Identify and Change Invalid Addresses	2-30
Manage Field Service Resource Availability	2-32
Committing the Schedule	2-36
Reporting on Tasks	2-37
Viewing Service History	2-38
Viewing the Service Request Details	2-39

3 Using Debrief

Debrief Summary	3- 1
Accessing a Debrief	3- 2
Viewing and Creating Notes	3- 3
Accessing your Calendar	3- 4
Entering Material	3- 5
Entering Expenses	3- 8
Entering Labor Time	3- 9
Recording Counter Readings	3-10
Viewing Onhand Quantity	3-11
Viewing Parts Requirement	3-12
Viewing Service Request	3-12
Updating the Task Assignment Status	3-13
Viewing a Pro Forma Invoice	3-14

Part 2 Spares Management

4 Using Spares Logistics

Spares Logistics Summary	4- 1
Create Parts Requirement	4- 1
Create an Internal Order or a Parts Reservation	4- 4
Use Parts Search Hierarchy	4- 6
Order Parts Using Move Orders	4- 8
View Parts Order Status	4-16
Execute Routine Replenishment	4-17
Return Excess Parts	4-18

5 Using the Planner’s Desktop

Planner’s Desktop Summary	5- 1
Create and Maintain the Planning Tree	5- 2
Create and Make Planning Recommendations	5- 7
Create Warehouse Notifications	5-21
View Parts Status on the Planner’s Desktop UI	5-26

6	Loop Planning, Notifications and Reporting Hierarchy	
	Loop Planning, Notifications and Reporting Summary	6- 1
	Define Parts Loops	6- 2
	Create and Use Loop Notifications	6- 4
	Create Reporting Hierarchy Nodes	6- 8
	Implementing Spares Management	6- 9
	Assigning Territories to Planner Groups	6-23

Part 3 Field Service Portal

7 Configuring Field Service Portal

	Portal Configuration Summary	7- 1
	Elements of the Dashboard	7- 1
	Customizing the Dashboard	7- 3

8 Using Field Service Portal

	Field Service Portal Summary	8- 1
	Using Quick Links	8- 1
	Update a Task	8- 7
	Create Service Request	8-14

Send Us Your Comments

Oracle Field Service User Guide, Release 11i

Part No. B13768-02

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the title and part number of the documentation and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Electronic mail: appsdoc_us@oracle.com
- FAX: 650-506-7200 Attn: Oracle Supply Chain Management Documentation Manager
- Postal service:
Oracle Supply Chain Management Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
USA

If you would like a reply, please give your name, address, telephone number, and electronic mail address (optional).

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

Preface

Intended Audience

Welcome to Release 11i of the *Oracle Field Service User Guide*.

This guide is designed for implementors, administrators and users of the Oracle Field Service application. It assumes that you have a working knowledge of the principles and customary practices of your business area, along with specific application knowledge of the Oracle Field Service suite of products.

See Related Documents on page x for more Oracle Applications product information.

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Structure

- 1 Understanding Field Service
- 2 Using Field Service Dispatch Center
- 3 Using Debrief
- 4 Using Spares Logistics
- 5 Using the Planner's Desktop
- 6 Loop Planning, Notifications and Reporting Hierarchy
- 7 Configuring Field Service Portal
- 8 Using Field Service Portal

Related Documents

Oracle Field Service Implementation Guide

Oracle Wireless Option for Service Concepts and Procedures

Oracle Field Service/Palm™ Devices Concepts and Procedures

Oracle Field Service/Laptop Concepts and Procedures

Oracle Advanced Scheduler Concepts and Procedures

Oracle Self-Service Web Applications Implementation Guide

Oracle Common Application Components User Guide

Do Not Use Database Tools to Modify Oracle Applications Data

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

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

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

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

Part 1

Debrief and Dispatch Center

Understanding Field Service

This chapter covers the following topics:

- Summary of Field Service
- Introduction to the Field Service Suite
- The Field Service Process
- Overview of Field Service
- How Field Service Relates to the E-Business Suite
- What is the Field Service Dispatch Center?
- What is Debrief?
- What is Preventive Maintenance?
- The Scheduling and Task Assignment Process
- What is Spares Management?
- What is the Field Service Portal?

Summary of Field Service

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Topics covered are:

- Introduction to the Field Service Suite, page 1- 2
- The Field Service Process, page 1- 3
- Overview of Field Service, page 1- 8
- How Field Service Relates to the E-Business Suite, page 1-11
- What is the Field Service Dispatch Center?, page 1-14
- What is Debrief?, page 1-17
- What is Preventive Maintenance?, page 1-20
- The Scheduling and Task Assignment Process, page 1-21
- What is the Field Service Portal?, page 1-36

Introduction to the Field Service Suite

The Oracle Field Service suite supports an automated process used by service organizations to manage their field service operations. It assists in the entire service process from taking the customer call to fixing and reporting on the problem at a customer site. The Spares Management module of Field Service provides parts replenishment support to the organization.

The Field Service suite offers a range of products to meet your organization's business needs. The following table lists all the products in the suite.

Suite Product	Description
TeleService	Customer Care is not really a product of the Field Service suite but the Service Request form is delivered with the Field Service application. The Service Request form takes the customer's call for service and creates a service request.
Common Application Components	The products in the Common Application Components are essential to use Field Service. They are used to create tasks, territories, define resources, and help in the assignment of tasks to resources. Common Application Components comes with Field Service.
Field Service	<p>The Field Service application assists in assigning tasks to service representatives, creating and dispatching daily schedules, monitoring progress, and reporting on material, expense, and labor transactions.</p> <p>The HTML-based field service portal module enables your technicians to manage and report on their task-based customer calls from any computer with an internet connection.</p> <p>You can also administer Preventive Maintenance programs from within this application.</p>
Spares Management	The Spares Management component provides additional logistics and planning features to manage a service parts inventory in a multi-location environment.
Advanced Scheduler	Advanced Scheduler provides comprehensive scheduling capabilities and enables the optimization of tasks to qualified resources. It uses a set of predefined constraints and associates costs for creating the most-optimized and cost-effective schedules for representatives. It takes into account driving time, distance, availability, SLA response times, preferred technicians, skills and spare parts.

Suite Product	Description
Mobile Field Service/Laptop	Mobile Field Service/Laptop is a disconnected remote application typically installed at a service representative's laptop to receive his daily schedule and report on progress, material, expense, and labor.
Mobile Field Service/Palm™ Devices	Mobile Field Service/Palm™ Devices is a disconnected remote application for a handheld device so a service representative can receive his daily schedule and report on progress, material, expense, and labor.
Mobile Field Service/Wireless	Field Service Wireless is a connected remote application that provides continuous connectivity access to enterprise applications. Using the wireless enabled devices, the technicians can remotely access the critical information required to complete their job at the customer's location. They can also report on progress of the task assignment and capture parts, expenses and labor information in real time.

The Field Service Process

The entire field service process includes several major areas. The process is initiated by the creation of a field service request. To perform service out in the field, tasks are linked to the service request. These tasks are assigned to service representatives. If applicable, required spares will be reserved or ordered. At the end, the service representative reports on the performed tasks, charges are created and, if billable, an invoice is created. This process is driven by service request status and task status changes.

The following topics are reviewed in more detail:

- The Field Service Business Process, page 1- 3
- How this Process Relates to the E-Business Applications Suite, page 1- 5

The Field Service Business Process

The steps in the field service process are described in the table below.

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

Step	Description
1. Field Service Request screening & qualification	<p>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 product or a part for in-house repair. When a field visit is required, a task is created based on the problem description and action is needed to resolve the problem. A definition for the parts necessary to resolve the task can also be given.</p> <p>For those enterprises employing proactive Preventive Maintenance programs, the solution provides the capability to log service requests automatically and allocate tasks to the appropriate resources with the right parts and schedule them in anticipation of the service need.</p>
1. Field Service Request planning and dispatch	<p>The tasks must be scheduled and assigned to the service representatives. The scheduling of the tasks is done based on various constraints such as skills, location, availability, and required parts. (Note: available constraints for scheduling may vary dependant on the installation of Advanced Scheduler.) When the tasks assignment is done the task or schedule is available for the service representatives. The service representative can accept or reject the task.</p>
1. Parts Request, Planning and Replenishment	<p>If parts are needed, the Spares Management component is used to replenish the field service warehouses, prioritize and replenish orders for the field technician, provide a process for managing excess parts, facilitate recovery, consolidation and repair of defective parts, and provide inventory planning for both the technician and field service warehouses.</p>

Step	Description
1. Field Service Request delivery and reporting	Upon receipt of an assigned task or schedule, the service representative delivers the service at the customer's site. He reports on progress, materials used, materials recovered, expenses made, and time spent. Additionally he can record a counter reading or provide information about how the problem has been resolved. It might be necessary to create new tasks or service requests if he can't help the customer immediately. He can recover the product or part of the product for repair and assign it an RMA (Return Material Authorization) to track the customer product. All the reported information is used for charges and, in case of billing requests, invoicing the customer. Reporting on materials used also results in auto replenishment of the service representative's car stock as well as updates to the install base configuration, if applicable.
1. Field Service Request monitoring	Things can happen any time during the process that endanger the execution of a field visit or task assignment. Escalations are raised to act accordingly.
1. Field Service Request completion and billing	When the service representative is completely done with the task, he marks the task assignment status as complete and moves on to the next task. The information can be validated by Service Manager in the office for any service contract or warranty coverage and charges will be generated. If billable, an invoice is created. Inventories, subinventories, and installed base are updated.

Note: Depending on your organization these steps can be separated or combined.

How this Process Relates to the E-Business Applications Suite

This section shows how this process relates to the E-Business Applications suite of products. The following table lists the possibilities for a field service solution based upon the process above.

Field Service Process Steps

Step	Application
1. Field Service Request intake and validation	<p>Oracle iSupport</p> <p>A service request can be initiated by the customer or by an agent through the web.</p> <p>TeleService</p> <p>A service request can be initiated by an agent from the Contact Center and/or Service Request form.</p> <p>Oracle Mobile Field Service</p> <p>A service request and/or task can be created by a Field Service Representative using the Oracle Mobile Field Service application.</p> <p>For each service request:</p> <ul style="list-style-type: none">• Write down the customer information.• Capture the Product to validate any warranty or contract coverage for service.
1. Field Service Request screening and qualification	<p>TeleService</p> <p>Service Request form</p> <ul style="list-style-type: none">• Analyze and record the problem.• When a field visit is required, take down the address where the product is to locate the product at the customers site.• Create tasks to perform the visit. Define the field service task type, define when a service representative is supposed to arrive at the customers site at Planned Start and End date. Define how much effort the task takes for completion, for example, 1 hour, half a day, or 1 day.

Step	Application
1. Field Service Request planning and dispatch	<p data-bbox="971 270 1109 296">Field Service</p> <p data-bbox="971 312 1471 600">Use the Dispatch Center to schedule and dispatch assign tasks. The Schedule Advise UI will drive the assignment options used for finding a qualified resource for the task. Assisted and Unassisted assignment options are available to all Oracle Field Service clients. Intelligent and Window to Promise assignment options including, travel time and distance calculations and spares integration is only available when Oracle Advanced Scheduler is installed as well.</p> <p data-bbox="971 617 1195 642">Advanced Scheduler</p> <p data-bbox="971 659 1471 842">Provides comprehensive scheduling capabilities and enables the optimization and re-calculation of scheduling tasks to qualified resources. It uses a set of predefined constraints and associates costs for creating the most-optimized and cost-effective schedules for representatives.</p> <p data-bbox="971 858 1190 884">Spares Management</p> <p data-bbox="971 900 1471 1026">Access the Spares Management application to order spare parts. When Advanced Scheduler is installed, and there is a parts requirement, the parts are automatically reserved or ordered at task assignment.</p>

Step	Application
1. Field Service Request delivery and reporting	<p data-bbox="873 270 1182 296">Mobile Field Service/Laptop</p> <p data-bbox="873 310 1373 443">After synchronization, the schedule is received by the service representative on his mobile device. He reports on material used, time spent, expenses made, and counter readings, if applicable.</p> <p data-bbox="873 457 1287 483">Mobile Field Service/Palm™ Devices</p> <p data-bbox="873 497 1373 630">After synchronization, the schedule is received by the service representative on his mobile device. He reports on material used, time spent, expenses made, and counter readings, if applicable.</p> <p data-bbox="873 644 1195 669">Mobile Field Service/Wireless</p> <p data-bbox="873 684 1373 787">The schedule is available at all times for the service representative on his mobile device. He reports on material used, time spent, and expenses made.</p> <p data-bbox="873 802 1019 827">Depot Repair</p> <p data-bbox="873 842 1373 974">To create an RMA for a recovered product or part of a product. Also, when enabled, receives parts in and out of supply chain warehouses as part of the Spares Management warehouse notification and replenishment process.</p> <p data-bbox="873 989 1011 1014">Field Service</p> <p data-bbox="873 1029 1352 1129">All information is received back from the mobile devices and consolidated in Debrief. This information is then updated to Inventory, Installed Base, and Charges.</p>
1. Field Service Request completion and billing	<p data-bbox="873 1163 995 1188">TeleService</p> <p data-bbox="873 1203 1352 1262">From Charges updates are made to create an invoice for billable expenses.</p> <p data-bbox="873 1276 1089 1302">Order Management</p> <p data-bbox="873 1316 1341 1388">In case of billable expenses, charges will be received in Order Management to create an invoice.</p>

Overview of Field Service

Field Service is an essential part of the Field Service application suite. At the core of Field Service is the Dispatch Center, which allows the field service dispatcher to plan, dispatch, and monitor all field service activities. This ultimately ensures that the right person is in the right place at the right time with the right parts. The Field Service Report enables you to report all activities performed out in the field. And Spares Management provides the logistics and planning functionality needed to manage a service parts inventory.

Review the following to learn more about the Field Service application:

- Field Service Dispatch Center Features, page 1- 9
- Field Service Debrief Features, page 1-10

- Field Service Preventive Maintenance Features, page 1-10
- Field Service Spares Management Features, page 1-10
- Field Service Portal Features, page 1-11

Field Service Dispatch Center Features

These are the features of the Field Service Dispatch Center:

- Shows information for a selected task such as a related service request, escalations, parts requirements and transactions, installed base related information, resources assigned for a task, customer address information, and required skills.
- Schedules and assigns tasks, either automatically or manually, to one or more service representatives. If Advanced Scheduler is installed, the automatic process of scheduling tasks can also be run as a background process.

Task assignment can also be done by the use of the Schedule Advise UI launched from the assignee button on the task tab in the Service Request form.

When Advanced Scheduler is installed, it brings you comprehensive scheduling capabilities and enables the optimization of scheduling tasks to qualified resources you can optimize your scheduling capabilities. Driving time and distance for the service representative is provided, required skills are reviewed and parts reservations or orders are made for the parts requirements. For more information, see the *Oracle Advanced Scheduler User Guide*.

- Manages parts information. Locating, ordering, and monitoring parts for specific tasks.

If Advanced Scheduler is installed, locating parts and creating reservations or orders is done automatically.

- Commits individual tasks and daily schedules to service representatives, either automatically or manually. When parts orders are created, this process initiates the booking of the order for the parts.

Committed tasks or daily schedules are now available for the service representative's mobile application with information about the task, related service request, problem and resolution, customer address information, installed base information when applicable, and counters.

- Monitors schedules, activities, and progress, of service representatives.

Use different grids to visualize the planning such as a daily view, view over a period of time (user definable), or a geographical representation.

Escalation notifications give you the ability to react to non-conforming tasks. A task becomes non-conforming when not scheduled within a given time frame, for example, or when contract response times cannot be met. All cases should be set up in escalation management by rules to be monitored.

- Makes a selection of tasks based on characteristics defined in customizable queries, such as ready to be planned, planned for today, or escalated.
- Views service history for a customer or a product.
- Manages resource availability for single or multiple technicians. Through the Trips Management UI, a dispatcher can easily block the trips of a single field technician or

multiple technicians, temporarily freezing the schedule in the process. You can also unplan or reschedule the technician's tasks.

- Uses robust skills management and assignment functionality to effectively assign tasks to appropriate technicians, based upon skill requirements and skill levels.
- Uses advanced color coding functionally, which makes the various tasks within the Plan Board and Gantt easily identifiable, depending upon a number of factors, including the task's priority, status type, or plan option.

Field Service Debrief Features

These are the features of Debrief:

- Reports on parts, expenses, and labor for a task assignment. This ultimately results in updates to Inventory, Installed Base, and Charges.
- Reports on Counters. From Field Service Debrief you can easily access the Capture Counter Reading functionality from Oracle Service to capture counter readings.
- Offers direct access to specific Spares Management functionality such as Parts Requirements and View Onhand Quantity.
- Offers direct access to Notes, Calendar, or Service Request and a Pro Forma invoice.

Field Service Preventive Maintenance Features

These are the features of Preventive Maintenance program in Field Service:

- Maintains and administers Preventive Maintenance programs.
- Logs service requests and allocates tasks to the appropriate resources with the right parts and schedules them in anticipation of the service need. The Preventive Maintenance demand can be based on the usage of the relevant item (estimated or actual usage). Also, the demand can be based on the date interval calculated from historical information (such as the service fulfillment date) or on the calendar such as defined in the contract.
- A concurrent program generates the Preventive Maintenance requests automatically (service requests and tasks). The tasks are created as a result of task templates, which are associated with the activities such as defined when recording the Preventive Maintenance demand.

Field Service Spares Management Features

These are the main features of Spares Management:

- Provides a process to automate the creation of the Authorized Stock List (ASL), which is used to define for field service technicians and warehouses recommended min-max levels.
- Provides a robust logistics process, which deals with those activities associated with order processing, physical handling, and movement of parts through field service warehouse to field technicians.
- Effectively tracks both usable and defective parts through the logistics cycle, including the recovery, consolidation, and repair of defective parts, which are key components in the overall field service logistics process. Once parts are repaired, they are received into the central warehouse and redistributed back to the technicians and field service warehouses.

- Provides a process for managing excess parts and incorporates supersession functionality, where one part may be replaced by another.
- Integrates with Oracle Depot Repair to allow the supply chain to incorporate a repair depot to fix defective parts.

Field Service Portal Features

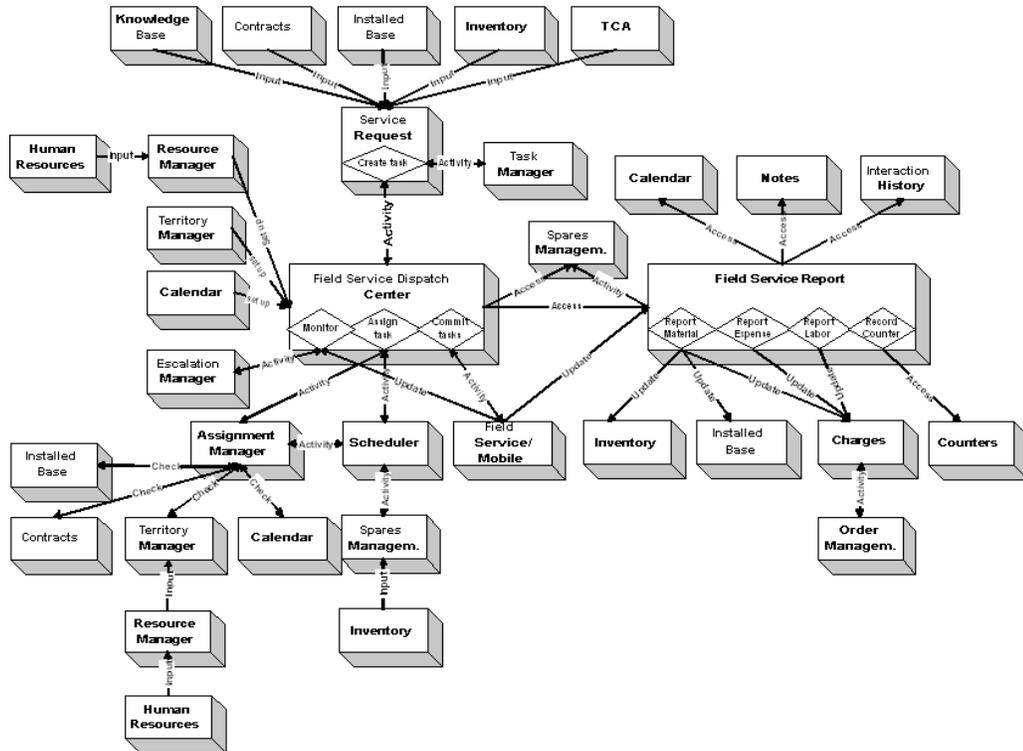
Field Service Portal is a web-based module designed to enable field technician's to receive service request and task information for tasks assigned to them. It allows technicians to manage tasks and spare parts, to add notes, and to initiate new service requests.

These are the features of the Field Service Portal:

- Provides a personalized dashboard view to serve as the entry point for a field technician.
- Allows for customizable multiple views for the dashboard, depending upon the technician's preferences.
- Enables search capabilities on service request, task number, and customer information.
- Provides integration to Oracle Install Base for item instances
- Supports Knowledge Base integration
- Provides the ability to view and create service requests, tasks, and notes.
- Provides access to spare parts information and enables a technician to order parts.
- Provides for the ability to return and receive parts.

How Field Service Relates to the E-Business Suite

Field Service is integrated with many other Oracle Applications. The following figure visualizes this integration. All applications involved and their relation are explained in more detail in the sections following the figure.



Service Request

A Service Request is created when a customer calls for assistance and it is determined that a service representative must visit the customer site. The following applications have a relation with Service Request:

- Knowledge Base provides input for resolution of the problem.
 - Contracts, including both Contracts Core or Service Contracts. Input for the service request is the response time, considered for task assignment.
 - TCA provides information on parties and contacts and their information.
 - Installed Base provides input on the installed base information sent to the Mobile applications. Used by the service representative when servicing the product.
 - Inventory provides input to determine what products are serviceable.
 - Task Manager functionality is used to create tasks to perform the field visit.

Resource Manager

All service representatives and field service dispatchers need to be defined individually in the resource manager. Field service dispatchers are also part of a dispatcher group created in Resource Manager to be able to access the Field Service Dispatch Center.

Territory Manager

Territory Manager is used for two purposes.

- It is used to create territories with service representatives assigned to it. These territories are then related to a dispatcher group. The service representatives

assigned to the territory show up in the Field Service Dispatch Center for the dispatcher.

- It is also used to create territory qualifiers for task assignment. These territory qualifiers are used by the Schedule Advise UI and Advanced Scheduler to retrieve a qualified service representative for a task.

Calendar

Working hours, shifts, and non-available working hours such as public holidays or vacations need to be defined for each service representative. This information is used for scheduling.

Dispatch Center Schedule Advise UI

The Schedule Advise UI assists in the task assignment from the Service Request form - Task tab - assignee button or Field Service Dispatch Center by finding a qualified service representative to resolve the task. The following applications have an indirect relationship with the Schedule Advise UI:

- **Installed Base**—A preferred service representative to perform the field visit can be recommended from the installed base.
- **Contracts**—A preferred service representative to perform the field visit can be recommended from Contracts, or Contracts Service.
- **Territory Manager**—Territories with qualifiers are created to filter qualified service representatives.
- **Calendar**—the availability of the service representative is checked in his or her calendar.

Advanced Scheduler

Advanced Scheduler provides comprehensive scheduling capabilities and enables the optimization and re-calculation of scheduled tasks to qualified resources. It takes into account driving time and distance, availability, SLA response times, preferred technicians, territories, skills and spare parts. Advanced Scheduler is tightly integrated with Dispatch Center and Spares Management.

Spares Management

Often, you need parts to resolve a problem at the customers site. You can access Spares Management manually to order parts for a task. If Advanced Scheduler is installed, and there is a Parts Requirement recorded against the task, a reservation, or internal order, for the part is created automatically at task assignment. In case of an internal order, the order for the part will be booked. You can update Spares Management indirectly from Debrief with parts usage for a task. The update is done to maintain stock levels at different locations, the subinventories.

Escalation Management

Escalations occur for a wide variety of reasons. An escalation management system allows an organization to identify, track, monitor, and manage situations that require increased awareness and swift action. Field Service summarizes and shows escalations for tasks that need to be or are scheduled.

Field Service Mobile

After task assignment, the schedule is committed and then tasks are available for one of the following mobile applications:

- Mobile Field Service/Laptop
 - Mobile Field Service/Palm™ Devices
 - Mobile Field Service/Wireless

Inventory

Inventory provides input for Service Request to determine which product needs service. You can update Inventory (Spares Management) from Debrief with parts usage for a task. Updating Inventory is done to maintain stock levels at different locations and subinventories. A subinventory could be a warehouse or a service representative's vehicle. Updating inventory results in activities to supply these warehouses or a service representative with new materials or to retrieve materials from them.

You cannot modify reported information in Debrief once it has been transmitted successfully to Inventory.

Installed Base

Installed Base provides input for the service request to indicate if it is an installed base item. It also provides input to the Dispatch Center and Advanced Scheduler as to which service representatives are preferred to perform the field visit.

You can update a customer's Installed Base from Debrief. Updating Installed Base results in an update of the items of the customer's Installed Base.

You cannot modify reported information in Debrief once it has been transmitted successfully to Installed Base.

Notes

Notes provide a text area where you can enter information about a customer, product, service, or anything related to your service report that may be helpful for other service representatives or customers. After you create a note, it can be attached to a task, sent to the customer, or submitted to the knowledge base for reuse. You can access Notes from Debrief.

Charges

You can update Charges with parts usage, counter information, labor time, and expenses for a task from Debrief. All information recorded is transmitted to the Charges database on update. In Charges, this information is checked against any contracts and charges are then sent to Order Management and a final invoice is generated.

You cannot modify reported information in Debrief after it has been transmitted successfully to Charges.

What is the Field Service Dispatch Center?

The Field Service Dispatch Center is a one-stop planning area where you can schedule, dispatch, and monitor tasks for service representatives out in the field.

A dispatcher can view all incoming tasks and then schedule these tasks to create a trip for each service representative. A trip includes all tasks for one service representative within a working day. A trip consists of a start time and location, which is defined as a departure task, and an end time and location, which is defined as an arrival task.

All tasks are scheduled between the departure and arrival tasks. In addition to scheduling tasks, the Dispatch Center allows you to act on escalations and monitor the service representative's progress and schedules using the plan board and gantt. You can also make last minute changes to schedules and, if Advanced Scheduler is installed, view your service group's status and location on the map.

The following topics are reviewed in more detail:

- What Tasks and Resources Do I See?, page 1-15
- Navigating in the Dispatch Center, page 1-15

What Tasks and Resources Do I See?

This topic describes the tasks that are available to you and the resources you see when you enter the Dispatch Center.

When Field Service is implemented, you define what resources are shown by default. You create dispatcher groups of which you are a member (mandatory) and you create territories with service representatives assigned to them. You establish a relation between the dispatcher groups and the territories.

These are the service representatives shown to you in the Dispatch Center on the plan board, gantt, and map. This feature is mainly meant for monitoring purposes. A large organization usually monitors a group of service representatives and not all of them. However, you can always choose to view all territories or a selection of territories using the corresponding option on the Navigate menu.

By default, all tasks that can be scheduled are available to you and also can be offered to you for scheduling. You can narrow down the task selection by choosing an appropriate query from the Tasks list or by defining your own query.

You can also choose to see only the tasks that you are allowed to schedule. You were defined as owner of these tasks at setup. For the tasks that you can schedule, it's possible that the most eligible service representative is not one of the service representatives you monitor. Even so, he or she is presented to you as the best option.

Navigating in the Dispatch Center

In the Tasks list in the left region of the Dispatch Center window, you can view tasks by selecting from the list of values. You can also use the flashlight icon to define your own query to find tasks. When you move your cursor over a task from the task list, details are displayed in the upper region of the Dispatch Center. Bold print indicates that a task is ready for planning. To select a task for planning you need to check it and press the Advise button at the bottom of the Dispatch Center or right mouse-click to select the schedule advise option.

In the upper region of the Dispatch Center you can view Task Details. All tabs display the task number, status, response time, and planned effort, defined at task creation.

The following information is displayed in more detail in the various tabs:

- Overview: This shows task description, customer information, task urgency, planned start and end dates (the date when a service representative is supposed to arrive

at a customer site), and scheduled start and end date (the date when a service representative is actually scheduled to visit the customer). If parts are necessary to resolve the task, this is indicated by the checkbox.

- **Service Request:** This shows the service request number, date service was requested, a summary, and problem and resolution description. Select and right-click the Request field to bring up a pop-up menu to access the source document (the Service Request UI).
- **Escalations:** If for some reason a task becomes non-conforming, escalation notifications show the reason. This tab shows a summary of escalations.
- **Spares:** The required parts are shown as well as the status in case the task has already been scheduled. You can access the Parts Requirement UI in the Spares Management application for the task selected to view more details.
- **Product:** This shows customer product description, serial number and lot number. Contract type, contract description, and product revision. If it is an installed base product, this is indicated.
- **Resources:** This shows the service representatives assigned to the task, as well as their status and travel time from the previous location to the selected task.
- **Address:** The address to visit is shown. This is also known as the installed at address.
- **Contacts:** This shows the contact person of the service request or the task. The default contact person of the service request is shown.
- **Required Skills:** This shows the skills required for the task.

In the lower region of the Dispatch Center you can monitor and schedule tasks for a group of service representatives on the plan board, gantt, and, if Advanced Scheduler is installed, also the map. By default, you see the group of service representatives defined at setup as described in the previous section. You can choose to view other groups of service representatives from the Navigate Menu on the tool bar. Choose Select Territories to show the territories with service representatives assigned to them on the plan board, gantt, and map.

How to use the plan board, gantt, and map:

- **Plan Board:** The plan board contains a grid populated with the service representative's name and his trip. A trip consists of departure and arrival tasks, and scheduled tasks for the day. Today's date is shown but you can select any date you like. Select and right-click the service representative's name to commit schedule, view resource information, resource addresses and subinventories and skills management. Select and right-click the departure task to block, optimize (sequence of tasks) or recalculate his trip. (Please note that only an empty trip can be blocked.) Select and right-click one of the tasks to show the source document, start a Debrief, send a message, request for a new schedule advise, or view and update the parts requirement in Spares Management.
- **Gantt:** The gantt chart view is a graphical overview of the scheduled tasks based on time. The date range shown by default is two days before the actual date and two weeks ahead of it. The date range is adjustable. The gantt displays a service representative's shift, his assigned tasks and the travel time between tasks (if Advanced Scheduler is installed). Put your cursor on a task to see task details. Select and right-click a task to access the source document.

- **Map:** The map is a geographical overview of a service representative's location when a task is in a status of "working." The date shown for the map is the actual date. You can also get an overview of tasks with their location, by first selecting and checking them in the task list and then clicking the Tasks button on the map. From the map you can easily assign tasks and access source document details. Select and right-click a service representative or task to access source document details. When a task is checked from the task list, double click a service representative to start task assignment.

The buttons at the bottom of the screen enable you to do the following:

- **Auto Schedule:** Before using this button, check a task or multiple tasks from the task list. It automatically schedules tasks to resources using the selection criteria from the Schedule Advise UI or Advanced Scheduler (if installed). For more information on scheduling criteria, refer to The Scheduling and Task , page 1-21 Assignment Process.
- **Advise:** Before using this button, check a task from the task list. The Scheduling Advice window opens to assist you in assigning a task to a resource using selection criteria from the Schedule Advise UI or Advanced Scheduler. For more information on scheduling criteria, refer to The Scheduling and Task , page 1-21 Assignment Process.
- **Go to:** Click in combination with the plan board, gantt, or map. You can search for a particular resource to be presented on the plan board, gantt, or map.
- **Refresh:** Click to refresh the plan board, gantt, or map.
- **More:** Click to enlarge the plan board, gantt, or map.

Use the Navigate menu from the tool bar to access the Commit Schedule window to manually commit tasks or schedules to service representatives. This can also be done automatically via a concurrent request if you set it up. Use the Navigate menu to navigate to the service request or spares management application populated with the details for the task selected from the task list.

You can also use it to populate the plan board, gantt, or map with territories of service representative other than the ones shown to you. Skills Assignment, Skills Management, Parts Requirement, and Resource Addresses and subinventories can also be accessed from the Navigate menu from the tool bar.

What is Debrief?

Debrief documents information related to a specific assignment task performed at a customer site. Use Debrief to record all the day-to-day activities out in the field. This includes parts used and recovered, expenses accrued, amount of labor time spent, and capture counter readings. After the information is collected and captured on the screen, you can update the customer's installed base, maintain your spares inventory, and update charges information.

When all the information has been captured on one of the Field Service/Mobile applications, it is uploaded and displayed in Debrief. There it can be used for review and to update the customer's installed base, spares inventory, and charges information.

The upper half of Debrief is populated with task assignment details. You can change the task assignment status to reflect the current status.

The main features in Debrief are:

- Reporting on Materials, page 1-18

- Reporting on Expenses, page 1-19
- Reporting on Labor, page 1-19
- Reporting on Counters, page 1-19
- Ability to View and Create Notes, page 1-19
- Accessing Calendar, page 1-20
- Integration with Spares Management, page 1-20
- Quick Menu, page 1-20

Reporting on Materials

The Materials tab records and updates all material transactions performed while at work at the customer site. These transactions include parts usage and recovery and Installed Base, Inventory, and Charges updates.

Initially one item is associated with a service request. This can be an item from a customer's installed base or an item from the Inventory list. One or more tasks are created for this service request and you can create a Debrief for each task. If multiple resources are assigned to a task, multiple Debrieffs can be created for each task assignment. You can report several material transactions in Debrief. For each material transaction a separate line is created in Charges. This line includes information about the following:

- For parts that are recovered from customers' installed base, it shows in which subinventory the parts were recovered, the reason for recovering the part, and the impact on installed base and inventory.
- For parts that are installed at the customer's site, it shows from which subinventory the parts were installed from. Optionally, the user can enter the reason for installing the part and the impact on installed base and inventory.

Based on the material transaction type you have chosen, you must fill out a set of mandatory fields in Debrief. Additionally you can capture specific material information such as serial numbers or lot numbers when applicable. When dealing with a material transaction such as a replacement for a customer's Installed Base you need to carefully define what part you have taken out of the customer's Installed Base and what part you are putting back in. This is done by capturing two material transaction detail lines.

In cases where a task has been created using a task template, and the task has parts associated with it, the Parts Requirement button on Debrief UI will be enabled. When the user clicks on the button, the parts that have been associated with the tasks will default on the Materials line. The representative can verify the results and modify them in case modification is required and save the Material debrief line.

When the task assignment is complete, Inventory, Installed Base, and Charges are updated with the material transaction lines created. The Installed Base update results in an update of the items in the customer's Installed Base. The Charges updates results in checking what material is covered by contract and what needs to be invoiced to the customer.

Note: A field technician cannot create a new debrief line in any case where the task assignment status entered has the 'closed' attribute enabled in the task status setup form. This feature prevents mistakes and enables more accurate and complete invoicing.

Some field service operations provide temporary parts to a customer in place of a part that must be repaired. Field Service Debrief accounts for this scenario by supporting loaner transactions, which are logged in the material debrief line. Loaner transactions are identified in debrief based upon the service activity code assigned to them. When a technician is logging a material line with a service activity code of type "loaner" then there will be no change of ownership, as the part is still owned by inventory and not the customer. The customer may be expected to return the by a certain date once the defective part is fixed and shipped to the customer.

Reporting on Expenses

On the Expenses tab you can document expenses accrued during your visit. For each expense transaction user can create a separate line in Debrief. You can select a predefined expense item with a related price list or to enter the actual amount accrued. This can include expenses such as driving costs, parking tickets, and meals.

When the task assignment is completed, the Charges updates results in checking what expenses are covered by contract and what needs to be invoiced to the customer.

Reporting on Labor

On the Labor tab you can report labor and travel time. You can also record your car mileage for reference. For each labor transaction, user can create a separate line in Debrief.

When the task assignment is completed, the Charges updates results in checking what labor times are covered by contract and what needs to be invoiced to the customer.

Reporting on Counters

Counter readings can only be recorded for customer products defined in the installed base which have a counter assigned to them. When the button is greyed out, it means there are no counter readings associated with the product. In case when a product against which service request is created has counters associated with it, the counters button will be enabled.

When you select the Counters button, the Counters window is opened. This window displays in a spread table all of the counters that are set up for that customer product. Double clicking a line from that spread table opens the Capture Counter Reading window.

Note: When working on service requests that have counters associated with them, when a technician changes a task assignment status to 'completed' he receives an alert message asking if he wants to capture a counter reading.

Ability to View and Create Notes

At any time during the process of scheduling service requests, assigning tasks and debriefing, a service representative or call center agent can add a note to a task. In the Debrief window a service representative cannot only add to a task but can also view notes associated with the service request and a task. This feature allows a consolidated view of a task and all the related notes added during the lifecycle of the task.

Accessing Calendar

At any time you can access your Calendar from Debrief by clicking on Calendar button in Debrief window. The Calendar is a scheduling tool used to define and view available and non-available time for a resource or group of resources.

Integration with Spares Management

From the Tools menu on the tool bar of the Debrief main window, the following Spares Management functions can be started and populated with information regarding the service request or task:

- View Onhand Quantity: Used to review onhand balances for the Item at the subinventory level.
- Parts Requirement

Quick Menu

Use Quick Menu, available on your tool bar, to navigate to the following applications and windows:

- Parts Requirement
- Service Request
- View onhand quantity
- Pro Forma Invoice

The applications are populated with the task or service request information for which you have opened a Debrief.

What is Preventive Maintenance?

In addition to solutions that address reactive service needs, more and more service centers require systems that are equally effective in supporting proactive support scenarios. The Preventive Maintenance (PM) solution, the latest addition to the Oracle Service suite of products, provides the capability to log service requests and allocate tasks to the appropriate resources, with the right parts, and schedule them in anticipation of the service need.

The service need can be estimated based on item usage, calendar dates as specified in the contract, or a date range. Preventive Maintenance combines Oracle's Complex Maintenance, Repair and Overhaul (CMRO) functionality with Oracle Service Contracts and Oracle Field Service to enable service centers to author PM contracts for PM programs, which can be sold with the product and thereby attribute to revenue generation for the company.

PM programs can be defined for products that need preventive maintenance and then the program can track customer products, their installations, and their usage. A comprehensive PM process can be categorized as follows:

- **PM Program Definition, PM Coverage Definition & Contracts Authoring:** This business process step involves the definition of suggested preventive maintenance programs and their respective coverage. These setups are handled in CMRO's Preventive Maintenance mode, and Oracle's Service Contracts.
- **PM Sales/Contracts, Instantiation and Contract Management:** This is a process step in which a product and/or PM coverage is sold to the customer. Once a product

and respective coverage is sold, an instance of that product, coverage (contract) and program are maintained by the service/contracts department to track and plan for PM activities.

- **PM Planning:** Service departments generally plan in advance the PM activities they need to perform and resources required to fulfill those activities. Planning is an important step of the preventive maintenance process and enables optimal operations and effective delivery.
- **PM Execution:** This process step involves the generation of PM requests (as a result of product usage, customer request and other events) and fulfilling them. The execution process involves, scheduling, reserving/allocating resources, capturing customer confirmation, delivering PM activities and billing the customer.

Field Service picks up the Preventive Maintenance program during the execution phase. In general, once a customer is "in contract" and has purchased a Preventive Maintenance plan, a Field Service operation executes the maintenance spelled out in the contract. Service request and tasks related to PM programs are created through a concurrent program, field technicians carry out work and close the task, and the PM is updated by another concurrent program, reflecting the closure of the task.

For detailed information on setting up, implementing, and maintaining Preventive Maintenance, see the *Oracle Field Service Implementation Guide*.

The Scheduling and Task Assignment Process

Task scheduling or task assignment is the core functionality of the Field Service application. Task assignment in Field Service is assisted by the Schedule Advise UI. Advanced Scheduler functionality is used for enhanced task scheduling. The task assignment process uses criteria based on preferred resources, resource availability, skills, and territories to select a qualified resource for a task. If Advanced Scheduler is installed, you can optimize your scheduling capabilities with a set of business-driven weighting criteria defined at implementation, and calculate travel time and distance in between tasks. With Advanced Scheduler installed you can also create reservations or internal orders for spare parts when scheduling tasks.

There are four options presented to you for scheduling and task assignment. If Advanced Scheduler is not installed only two options for task assignment are active.

Tasks change status during the field service process of scheduling or assigning tasks. Depending on the current status, different subsequent actions (or transitions) and statuses are possible. Task statuses and task assignment statuses are shown in the Dispatch Center, and enable the dispatcher to keep track of progress. The task status flow is specific to the Field Service application and is therefore explained in more detail.

Review the following topics to understand more about the scheduling and task assignment process:

- Scheduling versus Task Assignment, page 1-22
- Scheduling and Task Assignment Dependencies, page 1-22
- Scheduling and Task Assignment Criteria, page 1-23
- Scheduling and Task Assignment Options, page 1-25
- Task Status Flow, page 1-26

Scheduling versus Task Assignment

Scheduling and task assignment are two different things. When scheduling, your goal is to create a trip for each service representative within a working day consisting of the most logical sequence of tasks and load. It is thus important to be able to calculate travel time and distance between tasks, and to be able to recalculate a schedule to optimize the sequence of tasks in a trip. These are features specific to scheduling. For task assignment, the application does not consider the sequence of tasks already scheduled or the definition of a service representative's working hours (shifts). It assigns a task to a resource based on a very small set of criteria. In addition, when scheduling, spare part availability is considered and reservations or internal orders for parts are created. Scheduling is recommended over task assignment.

Scheduling and Task Assignment Dependencies

The task assignment and scheduling processes use criteria based on preferred resources, resource availability, skills, territories, parts availability, and travel time and distance to select a qualified resource for a task. There are a few dependencies task assignment and task scheduling rely on. The following table lists the dependencies.

Scheduling and Task Assignment Dependencies

Dependency	Description
Preferred resource information	A preferred resource is a single person that is defined in Oracle Contracts or recommended from the Installed Base in Oracle Service.
Skill	Skills are the field service representative's competencies. Skills fall into three major categories: technical product skills, other technical skills, and non-technical skills (for example, specific knowledge of a certain language). When scheduling each task, Advanced Scheduler matches the field service representatives' skills to the skills required to perform the task
Skill level	The skill level indicates the expertise scale of the field service representative's skill.
Territory definition	Territories are defined in Territory Manager. For more information, refer to Territory Manager.
Task duration information	Task duration is essential for checking the availability of the resource and for designating a resource as unavailable in the resources calendar after a task has been assigned. Task duration information is the amount of Effort defined at creation of the task.
Task planned - Start and End date and time	Task planned start and end date and time is the time window within the Schedule Advise UI will look for resources.
Resource's availability information	Availability of the resource is provided by the Calendar component in which resource shifts and unavailability are defined. For more information, refer to Understanding Calendar.
Spare parts location and availability	Spare part location and availability information is a dependency for Advanced Scheduler to make a reservation or internal order at task assignment. Spare part information is provided by Spares Management.
Road network for calculation of travel time and distance	A road network is a dependency for Advanced Scheduler to be able to calculate travel time and distance in between tasks.

Scheduling and Task Assignment Criteria

There is a difference in how Schedule Advise UI and Advanced Scheduler consider selection criteria to retrieve a qualified resource for a task. When you schedule manually, you can also influence how the selection criteria are applied. When you schedule automatically (Advanced Scheduler functionality) an assumption is made on how selection criteria are applied. You can start automatic scheduling manually or you can run it as a background process, called autonomous scheduling.

Review the following table to learn about the differences and how the criteria are used to select a qualified resource for a task:

Scheduling and Task Assignment Criteria

Criteria	Schedule Advise UI (Assisted and Unassisted schedule options)	Advanced Scheduler (Intelligent and Window to Promise schedule options)	Automatic and Autonomous Scheduling
Territory Qualifiers	Used to retrieve all the qualified resources for the assignment from the selected territories.	Used to retrieve all the qualified resources for the assignment from the selected territories.	Used to retrieve all the qualified resources for the assignment from all territories defined.
Contracts	When selected, this is the first resource criteria considered.	When selected, this is the first resource criteria considered.	Selected as the first criteria considered.
Installed Base	When selected, this is the first resource criteria considered.	When selected, this is the first resource criteria considered.	Not used.
Skills	Not used.	Matched are the field service representative's skills to the skills required to perform the task.	Matched are the field service representative's skills to the skills required to perform the task.
Resource Available	When a resource is found based on the criteria above, its availability is considered.	Advanced Scheduler always considers the availability of the resource.	The availability of the resource is always considered.
My Suggestion	When entered, the suggestion is always returned as a plan option.	When entered, the suggestion is always returned as a plan option.	Not used.
Spares (Advanced Scheduler functionality)	Not used.	A list of qualified resources based on the criteria above is passed on to Spares Management, which checks parts availability based on the availability condition selected.	A list of the qualified resources based on the criteria above is passed on to Spares Management, which checks parts availability based on a predefined availability condition.

Criteria	Schedule Advise UI (Assisted and Unassisted schedule options)	Advanced Scheduler (Intelligent and Window to Promise schedule options)	Automatic and Autonomous Scheduling
Travel time and distance (Advanced Scheduler functionality applied automatically)	Not used.	The travel time and distance for each plan option are calculated for the resources returned from the Schedule Advise UI (when no parts are used) or Spares Management.	The travel time and distance for each plan option are calculated for the resources returned from the Schedule Advise UI (when no parts are used) or Spares Management.
Cost Related Constraints (Advanced Scheduler functionality applied automatically)	Not used.	Advanced Scheduler applies pre-defined business driven constraints for each plan option to produce a list with qualified resources or available time slots.	Advanced Scheduler applies pre-defined business driven constraints for each plan option to produce a list with qualified resources.

Scheduling and Task Assignment Options

When you schedule manually, there are four options presented to you for scheduling or task assignment. This is also referred to as assistance level. The enabled options presented to you depend on whether Advanced Scheduler is installed or not.

Refer to the following table to learn more about the options for scheduling manually:

Assistance Level	Description
Unassisted	Use this option to assign a task to a service representative of your choice without taking into account any of the criteria.
Assisted	Use this option if you want Schedule Advice UI to find qualified resources to perform the task in the given planned start and end date and time frame. A list of resources is displayed in the Advice tab.
Window to Promise	This option is specific to Advanced Scheduler. Use this option if you want Advanced Scheduler to find available time slots. The Advice tab displays time slots at which a resource can visit the customer to perform the task with related cost. These time slots are offered to the customer and after selection the Planned Start and End date is set accordingly. The schedule can be optimized at a later stage.
Intelligent	This option is specific to Advanced Scheduler. Use this option if you want Advanced Scheduler to find qualified resources. The Advice tab displays the resources and their related cost. Typically the resource with the lowest cost is the best option.

Task Status Flow

The scheduling and task assignment process is driven by task status changes specific to Field Service. When a task enters the Dispatch Center it has the status it was given at creation and it is suitable for scheduling. When the task is assigned to a resource, a task assignment is created. A task assignment consists of a resource and a related task. One task can have multiple task assignments if multiple resources are assigned to the task. After task assignment you can still optimize your schedule up until the moment the schedule is committed. When the schedule is committed, tasks change status to "assigned," and the task assignments are available for the service representatives. Service representatives report on the task assignment status. The task assignment status is displayed in the Resources tab to monitor progress. The task status is displayed on the plan board, gantt, and across all tabs in the upper region of the Dispatch Center.

Note: You can set up your business process to automate task closure when a service request is closed. You can set the profile option CSF: Default Auto Close Task Status to determine what the default task assignment status should be assigned to those tasks closed through the automated task closure. The default value is 'closed.'

For more information, see *Close Task Automation*, page 2-39

The following table lists all seeded task statuses, their behavior, and possible statuses to change to. When all task assignments for a task are completed, the task status will change to completed.

Seeded Tasks Statuses

Task Status	Task Assignment Status	Behavior	Following Possible Statuses
In Planning	In Planning	The task is ready for planning or already assigned to a service representative. The planner is still optimizing the schedule and can still assign the task to another service representative.	Assigned/ Auto Reject/ Cancelled
Auto Reject	-	When scheduling automatically, a task assignment can fail. The task status is set to auto reject.	In Planning/ Cancelled
Assigned	Assigned	The task is assigned to a service representative and the schedule is committed.	Accepted/ Rejected/ Working/ Completed Cancelled
-	Accepted	The task is accepted by the service representative. Reporting on the task is possible.	Reject/ Working/ Interrupted/ Cancelled
-	Rejected	The task is rejected by the service representative. The dispatcher can change it back to Assigned to force the service representative to accept it, or change it to In Planning to assign it to another service representative. Reporting on the task is possible.	In Planning/ Assigned/ Accepted/ Working/ Cancelled

Task Status	Task Assignment Status	Behavior	Following Possible Statuses
-	Working	The service representative has started working on the task. The actual start time is entered, enabling the dispatcher to view progress on the schedule and to view the predicted start times of the tasks scheduled next. Reporting on the task is possible.	Interrupted/ Completed/ Cancelled
-	Interrupted	The work on a task has stopped. The dispatcher can assign it to another service representative, changing the status to In Planning, or assign it to the same service representative later. The service representative can also continue working on the task. Reporting on the task is possible.	In Planning/ Assigned/ Working/ Completed/ Cancelled
Cancelled	Cancelled	The task is cancelled. The dispatcher can assign it to the same representative again by changing the task status to Assigned, or he can change the status to In Planning to assign it to another service representative. Reporting on the task is possible.	In Planning/ Assigned/ Closed
Completed	Completed	The task is done and frozen. No updates or reporting on the task is allowed anymore.	Closed
Closed	-	The Debrief for the task is reviewed and pushed to charges. Updates to the installed base and knowledge base are made.	None

What is Spares Management?

Spares Management is positioned in the field service solution as a module providing both the logistics and planning functionality needed to manage a service parts inventory. Logistics processes deal with those activities involved in order processing and physical distribution of parts. Planning, on the other hand, determines how much inventory is required for a technician or warehouse to support the required level of service at the forecasted level of usage.

The product uses core functionality from Oracle Inventory, Order Management, Purchasing, Depot Repair, and ATP extending those products where necessary with additional functionality to satisfy field service needs. There is also extensive integration with Oracle Field Service, including the Dispatch Center, Advanced Scheduler, Field Service Debrief and Field Service mobile products.

Spares Management is a complete solution that includes both logistics and planning processes that perform the following:

- Replenish the field service warehouses
- Create priority and replenishment orders for the field technician
- Provide a process for managing excess parts
- Facilitate recovery, consolidation and repair of defective parts
- Provide inventory planning for both the technician and field service warehouses.

Spares Management also uses "reverse logistics" functionality, consisting of recovery, consolidation, and repair of defective parts, which are key components in the overall field service logistics process. Once parts are repaired, they are received into the central warehouse and redistributed back to the technicians and field service warehouses.

This section includes the following:

- Integration with Field Service, page 1-29
- Integration with Depot Repair, page 1-30
- Field Services Logistics, page 1-30
- Field Service Inventory Planning, page 1-33

Integration with Field Service

In a Field Service operation, the parts ordering and deployment activities need to be closely coordinated with the scheduling and assignment of technicians. To be effective, the dispatching process needs to consider the availability of both technician and parts. When the right technician and right parts are available for the field service task, costs will go down and customer satisfaction will go up.

Integration with Advanced Scheduler

Advanced Scheduler is the Field Service product that provides automated scheduling and assignment of field technicians. Using powerful integration features with Spares Management, Advanced Scheduler can schedule technicians based on both technician and parts availability.

Spares Management interacts with Advanced Scheduler to define parts availability for those field technicians that can be assigned to a task. Advanced Scheduler uses the parts

availability profile, along with other cost information, to schedule the technician best able to complete the task at the lowest total cost in the time required.

Spares Management provides the capability to define parts required for a product and predefined task or task template. This can be done manually if, for example, specific parts are known; or it can be done automatically through the analysis of "frequently used parts" based on debrief transactions.

In the debrief process, the technician reports parts used (along with labor and expense) on the task. Specific parts required for a unique follow-up task can also be defined in Spares Management and processed through Advanced Scheduler.

Other Integration Features with Field Service

Effective field service dispatching considers the availability of both resources and parts. The Dispatch Center is the backbone of Field Service, providing functionality that executes the scheduling and assignment of field service tasks. Integration functionality with the Dispatch Center includes the following:

- View parts required for the task
- Point and click parts search tool
- Create parts orders for the technician
- View order status

When a task has been completed, the Field Service Debrief module is used to report labor, material, and expense. Parts used and parts recovered also can be reported. Transactions are automatically created to update the technician's inventory balances.

Integration with Depot Repair

Spares Management is tightly integrated with Oracle Depot Repair, which is an additional automated warehouse replenishment process, whereby parts are repaired at an internal depot and then circulated back into the supply chain for further use. In this scenario, defective parts are removed by a technician from a customer site and consolidated with other defective parts at an internal warehouse.

From there, a planner creates an internal order, which ships the parts to an internal depot that is supported by the Oracle Depot Repair application while, at the same time, creating the repair order and the internal order that ships the repaired parts back to the central warehouse.

A planner also can create a depot repair order directly from the Parts Status tab in the Planner's Desktop, which addresses the case where a planner needs to repair parts without a Warehouse Notification for replenishment.

Field Service Logistics

Fast cycle delivery of parts to the field technician is mission critical to the Field Service logistics operations. Logistics processes deal with those activities associated with order processing, physical handling, and movement of parts through the Field Service warehouses and out to the field technician.

Spares Management makes extensive use of core foundation logistics functionality found in core Oracle applications, such as Order Management, Inventory, Purchasing, and

ATP, extending these products where necessary to satisfy requirements unique to the Field Service environment.

The product uses logistics process built around the internal order using Order Management functionality. Field Service warehouses are modeled as inventory organizations. Technicians are linked to sub-inventories and grouped into organizations. With this structure, the user can take advantage of sourcing rules to define the supply chain for the technicians, and ATP to define sourcing for technician orders.

The move order from Oracle Inventory is also supported where a single organization model can be used. The Spares Management version of the move order has been enhanced to include pick, pack and ship functionality.

Track Usable and Defective Parts

Spares Management functionality tracks both usable and defective parts through the complete logistics cycle. Defective inventories are created when the technician recovers repairable parts from the customer site.

Parts are tracked at the technician level by assigning sub-inventories to the technician and designating them as either usable or defective. When the technician debriefs and reports a recovered part, a transaction to add the part(s) to the technician's defective sub-inventory is automatically created. When the technician reports a part used, a transaction is automatically created to reduce the balance of the usable sub-inventory.

Each technician would normally be assigned one usable and one defective sub-inventory. However, additional sub-inventories of either type can be assigned depending on business need. Also multiple technicians can be assigned to a single sub-inventory.

Usable sub-inventories would be assigned to the technician even in the Spares Management scenario where the technician is not routinely authorized to stock parts. In this scenario, the usable sub-inventory would be used to track parts shipped to the technician for specific tasks.

Parts not used as planned, would remain in the on-hand balance of the technician's usable sub-inventory until either used on another task or returned as excess.

Define Parts Used on the Task

Spares Management provides the capability to define parts required for a pre-defined task and product combination. The pre-defined task is created in a task template.

Parts required can be defined manually if the parts are known, or automatically from the analysis of parts used, which is recorded in the debrief transaction history. The likelihood (by percentage) that a part will be used on a task and the likelihood that a task will be used on a product is included in the functionality. The define parts functionality also includes supersession roll-up to filter out duplicate parts.

This functionality is used in Advanced Scheduler integration. It can also be used to automatically populate the Parts Requirement UI when an internal order or parts requirement is being created.

The parts required for a task can also be specified for a task that is not pre-defined. A good example of this might be a follow-up task requiring a specific part that was not planned. In this scenario, the parts required for the task would be defined in the Parts Requirement UI.

Priority Orders for a Field Technician

Field technicians may need additional parts to complete a task. Spares Management includes an order entry UI designed specifically to handle the technician's parts orders. The UI can be used to create either an internal order or a Parts Requirement for a specific task. The Parts Requirement defines what parts are required for a specific task and is used in the Advanced Scheduler integration functionality.

The Parts Requirement can be automatically created from the service request and task. This occurs when a task template is used to create the task and parts have been defined for the template and product referenced on the service request.

Used primarily by the dispatcher, this UI has many special features to address the unique needs of the service business, such as:

- Internal order can be linked to the service request and task
- Parts linked to the task are automatically entered
- View of technician's inventory for parts being ordered
- Integration with ATP functionality to determine source and availability
- View and selection of alternate parts
- Can create purchase requisition for drop shipment to/from supplier
- Technician or customer address can be easily entered or updated, or a special address can be added
- Scratch pad available to use when the technician does not know the specific Part Number.

The UI is used to create an internal order that can be processed through the standard pick, pack and ship process in Order Management.

Spares Management also provides a detailed view of order status starting from when the order is created to receipt at the destination sub-inventory. The UI provides figures for quantities processed as well as dates and times. Physical distribution details, such as pick list and pack list numbers, can also be viewed. Shipment details for carrier and waybill are available.

Excess Returns Process

Excess inventory happens in a field service operation. Parts shipped to a technician for a task and not used as planned, for example, could end up exceeding the technician's authorized stock level. The excess returns process consolidates the excess inventory from many technicians (or warehouses) and routes it back into designated warehouses where it can be more effectively utilized. Reacting quickly and efficiently to the excess condition is one of the keys to effective control of the Field Service inventory.

Spares Management has an excess returns process with features specifically designed to address the needs of the Field Service business. Key features include:

- Excess identification based on max levels
- Business rules to focus on high-impact excess
- Review and execution tools for the planner
- Auto-creation of excess orders from the planner review

The business rules are used to filter and prioritize the excess that has the highest impact on inventory value. The business rules are designed with mobile field service in mind where short, high-impact lists are easier to use. The planner can use the execution tools to either create an internal order or an inter-organization transfer depending on location of the parts.

The excess returns process can be used for both technicians and warehouses. The execution tools can be used to create an internal order for excess at a warehouse and an inter-organization transfer order for a technician.

The excess return process can be used for both usable and defective parts. The consolidation of defective parts from the field technicians is typically required before they can be integrated into the planning process and sent out for repair.

Hierarchical View of Inventory

Dispatchers and inventory planners need a complete view of status so parts can be quickly located and shipped to the technician. In the Planner's Desktop, the Spares Planning tree, in combination with the Parts Status tab, provides an easy-to-use point-and-click tool that can be used to view, locate, and order parts.

The view combines a hierarchical tree structure combined with a status tab that includes on-hand and on-order information. The user can create the tree structure using nodes to which either sub-inventories or organizations can be attached.

Some of the more important features include:

- Hierarchical presentation using tree structure
- Status information is summarized for the node
- Find function is available to locate specific parts
- Complete view of status that includes both on-hand and on-order
- Alternate parts search
- Integration with the Parts Requirement UI to order parts

This hierarchical view of inventory is integrated into the Dispatch Center functionality using a configuration specifically designed for the dispatcher to locate parts.

Field Service Inventory Planning

Service agreements often require that parts inventories be deployed in numerous locations across a broad geography, and close to the point of use. For example, same day service requires that parts be stocked in the metro area where the service is needed. As a result, many of the service scenarios require that parts be stocked at numerous warehouses and with many field technicians.

With the potential of a large number of stocking sites, an automated planning process greatly enhances productivity by streamlining the restocking process. Spares Management planning defines what parts need to be stocked where, and in what quantities, for both the technician and warehouse.

The Planner's Desktop provides for an organized presentation of the planning functionality in Spares Management.

Authorized Stock List for the Warehouse or Field Technician

The Authorized Stock List (ASL) defines which parts should be stocked, where they should be stocked and in what quantities. The ASL functionality available in Spares Management includes:

- Automated min-max recommendations for technicians and warehouses
- Flexible planning parameters for both service and inventory
- Min-max levels synchronized to service level
- Planning parameters that can be defaulted from higher-level nodes
- Functionality to handle complex planning scenarios

The ASL recommendation is based on usage history, planning parameters and planning method. The parameters can be uniquely applied to each technician or warehouse, or defaults can be applied which would help to avoid excessive data entry where many field technicians are involved.

Advanced planning methods, such as those outlined below, can be used to address the more complex scenarios typical in a field service environment:

Personal Usage Method

The "personal usage" method produces ASL recommendations based on a combination of usage for the technician or warehouse, and planning parameters for service and inventory. This functionality satisfies the scenario where the technician or warehouse is in a reasonably stable situation. Usage at the warehouse is determined by accumulating the usage data from the various technician groups supported by the warehouse.

Territory Norm Method

The "territory norm" method is used in those scenarios where the technician is either totally new to the service organization, or has been transferred into a new territory. In these cases, the technician does not have any usage history at all (in the case of a new technician), or, in the case of a transferred technician, the usage history from the old territory may be different than what will be experienced in the new territory. The territory norm represents what is typical or average for parts usage in the territory.

The territory norm can also be used in combination with personal usage. This method can be used to handle the situation where the technician is not doing normal Field Service activities for a certain period of time. In this scenario, the technician has personal usage but it does not represent a normal level of activity.

Product Norm Method

The "product norm" method satisfies the scenario where a technician or warehouse needs to support a new product. The product norm can also be used to plan for product population changes and extensions of product into new geographical areas. The product norm defines the product in terms of parts, populations, and failure rates. The product norm can also be used in combination with personal usage.

Notifications for the Central Warehouse

Standard min-max functionality from Oracle Inventory works well in a warehouse transfer scenario. In the more complex central warehouse environment, however, where parts are purchased from external suppliers, additional functionality is required for repair and excess utilization.

In the central warehouse, defectives accumulated from technician recovery activities must be repaired and excess parts from other warehouses often need to be utilized before purchases are made against external suppliers.

In the Spares Management solution, the central warehouse serves as an entry point for parts ordered from new-buy and repair suppliers. Repair suppliers are used to convert defective parts (recovered from customer sites) into usable parts, which are then made available for redistribution from the central warehouse.

In addition, the central warehouse planner needs to recognize and possibly react to excess inventory at other warehouses before placing an order for either repair or new-buy.

Spares Management notifications alert the planner to the condition where replenishment is required for the central warehouse. When replenishment is required, excess and defective quantities can be viewed in the notification. Execution tools to create purchase requisitions and internal orders are also provided. Notifications also alert the planner to the situation where too much is on-order. Filters for excess on-order are available to eliminate the low impact notification.

Warehouse Integration with Depot Repair

Spares Management integration with Oracle Depot Repair provides an automated method for parts repair at an internal depot. From the Planner's Desktop, a planner can create a depot repair order and the internal order required to move defective parts to and from the repair depot.

The planner also can create a depot repair order directly from the Parts Status tab in the Planner's Desktop, which would be necessary in the case where a planner needs to repair parts with a warehouse notification for replenishment.

Loop Planning

Spares Management supports the planning approach where individual sub-inventories can be grouped into Planning Loops for control of the total inventory across all sub-inventories in the loop. This is sometimes referred to as aggregate planning where the planning loop is used to coordinate planning and execution activities across multiple locations.

Spares Management has the flexibility to configure multiple planning loops within a single service operation. The planning loop can include sub-inventories from different inventory organizations and can also include both usable and defective sub-inventories.

Spares Management uses a Master Stock List (MSL) to define the plan for the Loop. The MSL defines the parts and total quantities to be stocked in the loop. In addition, the MSL provides for a minimum usable quantity to insure that the loop maintains a reasonable balance of usable parts.

Notifications can be generated by running a concurrent program when the total available is above or below plan conditions, as defined in the Master Stock List. Notifications will also be generated when the level of usable parts has dropped below the minimum usable on-hand level as designated in the Master Stock List.

Planner's Desktop

The Planner's Desktop in Spares Management provides an organized presentation of the functionality used for planning and execution at the location and loop levels. Included on the desktop are the loops, reporting hierarchies, notifications, and the planning tree. Within the planning tree, you can enter planning parameters, make

recommendations, and calculate failure rates. The desktop also includes the Master Stock Lists and the Authorized Stock Lists. The view of part availability data for the loop, location and hierarchy is on the desktop as well.

What is the Field Service Portal?

Field Service Portal is a web-driven technician-based module within the Field Service product suite. Within this module, technicians receive service request and task information for the tasks assigned to them by dispatchers. It provides an easy and organized way for the field technicians to manage their tasks, spare parts, add notes and initiate new requests.

Equipped with a fully configurable user interface, the Field Service Portal provides an easy and organized method to view existing task assignments and enter new service requests, allowing technicians to resolve problems while at the customer site.

The Portal is closely integrated with related Oracle applications such as Teleservice, Install Base, Knowledge Management, Service Contracts, Spares Management, and also key components of Oracle Common Applications Components, such as Notes, Calendar, and Tasks. The Field Service Portal also provides quick links for key processes that a technician typically might perform, such as creating a parts order, receiving shipments, etc.

Field Service Portal is a complete technician support module and includes the following functionality:

- Personalized Dashboard, page 1-36
- Ability to Search Assigned Tasks, page 1-37
- View and Create Service Requests, Tasks and Notes, page 1-37
- View Spare Parts and Order Parts, page 1-37
- Ability to Return and Receive Parts, page 1-37

Personalized Dashboard

Dashboard refers to the Portal's point of entry for a field technician. The information displayed in the columns results from default values set up by the technician in the view. The technician can personalize the search results in the dashboard in three ways:

- By clicking the Personalize link technicians can choose to display the columns they are interested in.
- By sorting the record base on certain columns in ascending or descending order to highlight critical data.
- By specifying how many records appear on dashboard.

The technician will have the ability to perform multiple functions from the dashboard to maintain task-related information. The user can drill down to the tasks screen by clicking on the update icon. The user can also select from the list of saved searches to re-query the dashboard based on search criteria.

By clicking on the personalize button, the user will be directed to personalize screen where they can modify the search criteria and set the personalization. Also, the user can define new search criteria and save it as a view for later usage. From the same personalization screen, the user can set a particular criteria as the search default criteria.

Ability to Search Assigned Tasks

Field service technicians can search on either service request, task number, or customer name for all the tasks that have been assigned to them. The default search criteria for the basic search is task number.

The technician can also perform an advanced search by clicking on the advanced search hyperlink and selecting the wider choice of search options from the advanced search user interface.

View and Create Service Requests, Tasks and Notes

Field service technicians have the ability to view and create service requests from the dashboard using an existing service request identifier such as serial number, tag number, instance address, account number, and so on. Additionally, the technician can also create a task and add notes to the task after the request has been generated.

The Update Tasks functionality also allows a technician to capture travel information, such as distance and time. A user can access a read-only pro forma invoice of all the charges related to a particular task, which can be printed out and provided to the customer.

A technician can create a new service request through the quick link functionality of the dashboard.

View Spare Parts and Order Parts

Spare Parts integration with the portal allows technicians to order parts specific to, or independent of, a task for their trunk stock. The technician will be able to access parts order UI by clicking on the "Parts Order" quick link from the dashboard.

Alternatively, the user can click on the Parts tab and then click on Order Parts. Based on the established sourcing rules, order parts functionality in the back end results in creation of a purchase requisition, an internal order, or a reservation.

Ability to Return and Receive Parts

Field service technicians can receive parts into the sub-inventory based on purchase order and internal order. The information displayed can include a host of details, such as carrier, shipment number, waybill number and packing slip number.

Return Excess parts that reside in a technician's trunk stock is based on min-max levels defined in Inventory. The portal also enables a technician to return defective parts to the central warehouse.

Integration with Knowledge Management and Install Base

The Technician's Portal integrates with Oracle Knowledge Management and Oracle Install Base to provide the user with easy access to valuable task-related information.

From the Dashboard, a technician can access Knowledge Management in two ways: From a Search Knowledge dialog box on the main page and also from within the Update Tasks UI. In the latter case, the search criteria is defaulted from the Service Request summary screen, although it can be modified. The Technician's Portal also supports a basic and advanced search.

The Install Base integration occurs when a Service Request is created against an Item Instance, which is maintained in Install Base. In this case, the Item Instance field is

rendered with a hypertext Instance Number. This link opens up the Install Base UIs where the user can view and update, as appropriate.

Using Field Service Dispatch Center

This chapter covers the following topics:

- Dispatch Center Summary
- Working with the Field Service Dispatch Center
- Finding Tasks
- Viewing Task Details
- Selecting Territories
- Managing Skills and Skill Levels
- Assigning Skills to Tasks
- Assigning Skills to Task Templates
- Access Spares Management
- View Resource Addresses and Sub Inventories
- View the Parts Requirement of a Task
- Working with the Plan Board
- Working with the Gantt
- Working with the Map
- Scheduling Tasks
- Identify and Change Invalid Addresses
- Manage Field Service Resource Availability
- Committing the Schedule
- Reporting on Tasks
- Viewing Service History
- Viewing the Service Request Details

Dispatch Center Summary

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Please refer to *Working with the Field Service Dispatch Center*, page 2- 2 for more information.

Working with the Field Service Dispatch Center

The Field Service Dispatch Center assists you to schedule tasks and monitor the schedules for service representatives.

Choose one of the following topics to guide you through the application:

- Finding Tasks, page 2- 3
You need to populate the Dispatch Center with tasks. Use this procedure to learn different ways to populate the Dispatch Center with tasks.
- Viewing Task Details, page 2- 5
Different tabs are available that give you a good overview on all the information related to a task. Use this procedure to learn about all the tabs.
- Selecting Territories, page 2-10
The Dispatch Center is populated with a group of service representatives that show up on the plan board, gantt, and map. Use this procedure to learn how to populate the Dispatch Center with a different group of service representatives.
- Managing Skills and Skill Levels, page 2-10 or Assigning Skills to Tasks, page 2-12 or Assigning Skills , page 2-13to Task Templates
A resource, service representative, or a task require certain competencies, skills, to resolve the task. Use either of these procedures to define the skills for either the service representative or task.
- Access Spares Management, page 2-14 or View Resource Addresses and Sub Inventories, page 2-14 or View the Parts Requirement of a Task, page 2-15
Use either of these procedures for parts related matters.
- Working with the Plan Board, page 2-16
The plan board provides information on service representative schedules in a daily view. From the plan board you can start a Debrief, assign a task, send a message, access the source document, recalculate a trip, and get resource details.
- Working with the Gantt, page 2-17
The gantt provides information on service representative schedules for a period of time. The gantt allows for task reassignment.
- Working with the Map, page 2-19
The map provides a geographic visualization on service representative schedules for the current date. The map gives you the opportunity to display tasks and their location and allows for task assignment.
- Scheduling Tasks, page 2-20
There are several ways and options to assign, or schedule, tasks to service representatives. After task assignment you can also optimize a service representative's trip, re-assign a task, or cancel a scheduled task. Use this procedure to learn how to schedule tasks, cancel tasks, recalculate a trip, or reassign a task.
- Identify and Change Invalid Addresses, page 2-30
Field Service provides a program that identifies invalid addresses, which can prevent a task from being scheduled, and allows a dispatcher to modify the addresses to correct the problem.

- **Manage Field Service Resource Availability, page 2-32**
The Field Service Dispatch Center provides a centralized view and point-of-control for scheduling, monitoring, dispatching and prioritizing field service representatives. In order to manage field service availability and to quickly deal with unexpected unavailability (i.e. illness), Field Service provides the Trips Management UI, where a dispatcher can quickly intervene and block a representative's availability, and replan the representative's tasks. When a resource is blocked, Advanced Scheduler will not schedule tasks into blocked trips. The Trips Management UI also allows a dispatcher to block single, or multiple trips and tasks in one action.
- **Committing the Schedule, page 2-36**
After task assignment you need to commit the schedule so that it is sent to the service representatives. Use this procedure to learn how to commit the schedule.
- **Reporting on Tasks, page 2-37**
Use this procedure to learn how to access Debrief to open or create a Debrief.
- **Viewing Service History, page 2-38**
You can view the service history for a customer site or a product. Use this procedure to learn how to view service history.
- **Viewing the Service Request Details, page 2-39**
When the task originates from a service request, the Service Request form can be accessed to view all details from the Dispatch Center.

Finding Tasks

Use this procedure to populate the Tasks list in the Dispatch Center with tasks. Once you have populated the Dispatch Center with tasks, you can assign them or review them. Tasks that are shown in bold can be scheduled.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. Make a selection from the View By list of values in the Tasks list to use a predefined query to search for tasks. By default the following queries have already been created with the following values:

Query Name	Description	Query Definition
Inbox	All tasks that can be scheduled, entered today, and haven't been assigned yet.	creation_date > trunc(sysdate) and scheduled_start_date is null and nvl(status_schedulable_flag,'N') = 'Y' and nvl(type_schedulable_flag,'N') = 'Y'
All Open	All tasks that are available for planning and can be scheduled.	nvl(status_schedulable_flag,'N') = 'Y' and nvl(type_schedulable_flag,'N') = 'Y' and not exists (select '' from csf_ct_task_assignments where task_id = csf_ct_tasks.task_id)
Auto Rejected	All tasks that are rejected by the Autonomous Advanced Scheduler.	task_status_id = 27
Assigned	All task that are already assigned.	task_status = assigned
Non-Schedulable	All tasks that cannot be scheduled.	tasks with schedulable_flags = "N"
Auto Scheduling	All tasks that can be scheduled by the Autonomous Advanced Scheduler.	Task_status = Auto in planning

2. To find tasks that do not conform to one of the predefined queries, click the flashlight icon on the tool bar. The Find Tasks window is opened.
3. Enter information to retrieve the kind of tasks you want to view. You can create a query based on a combination of the following search criteria:
 - a specific task or service request number
 - a specific service request or task specifications
 - tasks that you are the owner of
 - tasks that are assigned to you
 - tasks for a specific customer
 - tasks that need to be scheduled
 - tasks that have been scheduled
 - tasks that have been started for a selected date or date range
4. Click Find.
The Tasks list of the Dispatch Center is populated with tasks matching the query definition.
5. To add your query to the list of values from the Tasks list, choose Save Query As from the Tools menu on the tool bar.

The Save Query As window is opened.

6. Enter a Name for the query, this name is returned in the list of values in the Dispatch Center. Enter a Description for the query and an Active Start and End Date.
7. Click OK.

The query is added to the list of values when selecting View By from the Tasks region.

8. To edit the query choose Edit Query from the Tools menu on the tool bar.

The Edit Query window is opened. You can modify the information but you cannot delete a query. When the Active End date is reached the query disappears from the list of values that you see when you select View By from the Tasks region.

9. Right-clicking a task in the Tasks list brings up a popup menu:
 1. Click Show Service Request to show the window of the Service Request the task belongs to.
 2. Click Parts Requirement to show the window of the required parts of the task. It is possible to add part requirements when these are not yet there.
 3. Click Schedule Advise to assign the task.

The Scheduling Advice window is opened. This option will not be accessible when the task cannot be scheduled. Please note that it is not necessary to also select the task (by checking the checkbox).

Viewing Task Details

The upper region from the Dispatch Center provides you with detailed information for a selected task from the Tasks list.

Use this procedure to learn about the details displayed in the following tabs:

- Overview
- Service Request
- Escalations
- Spares
- Product
- Resources
- Address
- Contacts
- Required Skills

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. Populate the Tasks list with tasks.
2. Select a task from the Tasks list.
3. Choose one of the following tabs:
 - Overview
 - Service Request
 - Escalations
 - Spares
 - Product
 - Resources
 - Address
 - Contacts
 - Required Skills

Overview tab

The Overview tab displays the task details as described in the following table.

Task Details

Field	Description
Number	Task number, generated at creation of the task.
Status	Task Status.
Effort	When a task is created, the amount of time it takes to perform the task is estimated.
Name	A description of the task is given.
Respond By	Response time agreed upon with the customer either by contract or other means of communication. If the response time is not met, the task becomes non-conforming and an escalation notification is created.
Priority	The urgency given to the task.
Type	Task type definition. (For tasks that can be scheduled, the task type rule must be Dispatch. This is defined at implementation)
Parts	Indicates if spare parts need to be ordered, when Advanced Scheduler is installed this is done at task assignment.
Customer	Customer's name.
Telephone	Customer's telephone number.
Fax	Customer's fax number.
Planned Start and Planned End	A service representative is supposed to arrive at the customer site between the planned start and end date.
Scheduled Start	The actual scheduled time a service representative arrives at the customer site.
Scheduled End	The scheduled end date is either the start date plus the effort or the end date of the time window that was offered to a customer when it was scheduled with the Window to Promise.

Service Request tab

When the task originates from a service request, details for the service request are displayed in the Service Request tab, as described in the following table.

Field	Description
Request	Service request number. Right-click this field to bring up a pop up menu to access the service request form.
Order Date	Date the service request was created.
Summary	A summary of the service request.
Organization Unit	The organization unit that the service request belongs to.
Problem	A problem description for the service request.
Resolution	A resolution description for the service request.
Service History	You can view the service history for a customer site or a product by clicking this button. For more details, see Viewing Service , page 2-38History.
Task	Task information for your reference is displayed.

Escalations tab

The Escalations tab gives you a summary and status of all the present escalation notifications. An escalation occurs when a task becomes non-conforming. A task becomes non-conforming when some of the criteria for it to be assigned and resolved either cannot be met or are close to not being met. For example, suppose the contract agreement guarantees a four hour response time, and after 3.5 hours the task has not yet been assigned. The task then becomes non-conforming and is escalated.

Spares tab

The Spares tab gives a summary of the spare parts necessary to resolve the task and their status. Selecting the Requirement Number (hyperlink) in the results spread-table opens the Parts Requirement window for this task.

To access the Spares Management application choose Spares Management from the Navigate menu on the toolbar. The Parts Search user interface is shown, allowing you to search for specific parts.

For more information on Spares Management, see in this guide.

Product tab

The Product tab shows details about the product from the service request. Additional information is displayed when the product is defined as an installed base item. The Installed Base flag is checked if Installed Base validation was selected on the service request.

Field	Description
Request	The related service request number.
Description	A description of the product.
Serial number.	Serial number, if applicable.
Lot	Lot number, if applicable.
Installed base	Indicates if the product is defined as an installed base item.
Contract Type	The contract type for the product, if applicable.
Description	A description of the contract type.
Revision	Revision number, if applicable.
Task	Task information for your reference is displayed.

Resources tab

When the task is scheduled, the Resources tab shows you which service representative or service representatives are assigned (Assignee) to the task and their status. If Advanced Scheduler is installed, a route description is given.

Field	Description
Assignee	The name of the service representative to whom the task is assigned.
Type	The resource type.
Status	The status of the service representative assigned to the task. This status field is updated when a service representative in the field updates it.
Travel Time	The amount of travel time from the previous task to the current task.
More	Click More to display the route information.
Task	Task information for your reference is displayed.

Address tab

The addresses of the customer and the product that needs service are shown.

Contacts tab

Shown is the title, first name, last name, and phone number, extension and email address of the contact person. This can be the contact person of the service request or

the contact person of the task, for these can be different. You can select the Source from the list of values (showing only Service Request and Task). Default the contact person of the service request is shown.

Required Skills tab

Shown are the required skills for the task: Skill Type, Skill Name and Skill Level. It is not possible to make any changes in this tab. If a skill is disabled in the Assign Skills to Task module, the Disabled checkbox is checked.

Selecting Territories

Use this procedure to select a group or groups of service representatives. The Dispatch Center shows the group or groups selected on the plan board, gantt, and map.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the menu in the Dispatch Center, go to Navigate and choose Select Territories.
2. Make a selection from the territories assigned to you.
3. To view all territories, including the ones not assigned to you, check the Show All Territories box.
4. Click OK.

The groups of service representatives selected are displayed on the plan board, gantt, and map.

Managing Skills and Skill Levels

Skills are the field service representative's competencies. Skills fall into three major categories: product skills, other technical skills, and non-technical skills. The skill level indicates the expertise scale of the field service representative's skill. For example, expert, trainee, and experienced could be skill levels. Learn from this procedure how to setup skills and skill levels and how to assign them to field service representatives.

Use this procedure to assign skills and skill levels to field service representatives.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From within the Dispatch Center, go to Navigate and select Skills Management. Alternatively, select the Plan Board tab, right-click on the Resource Name and choose Skills Management.
The Skills Management window is opened.
2. Select the Resources tab.
3. Select the appropriate resource type from the Resource Type list of values.
4. Select a field service representative name from the Resource Name list of values. The list of values only displays the field service representatives who have been assigned to the Resource Type you selected.
5. Select a Skills Type from the Skills Type list of values.
6. The Skills Name is filled in automatically
7. Select a Skill Level from the Level list of values.
8. The start date (From date field) defaults to today's date. You can override this value if needed.
9. The end date (To date field) is used to inactivate the relevant skill of the field service representative.
10. Save your work.
11. Selecting the Switch View button shows all resources having the selected skill.
12. Select the Skills tab.
13. Enter the Skill Type Name.
14. Enter a Skill Type Description (optional).
15. Enter the Use Scale by selecting from the Use Scale list of values.
16. The start date (From date field) defaults to today's date. You can override this value if needed.
17. The end date (To date field) is used to inactivate the Skill Type. This applies to all skills of this Skill Type.
18. Enter the Skills Name.
19. Enter the Skill Description (optional).
20. Enter a possible Alias (optional).
21. The start date (From date field) defaults to today's date. You can override this value if needed.
22. The end date (To date field) is used to inactivate the Skill.
23. Save your work.

24. Select the Skill Levels tab
25. Enter the Rating Scale Name.
26. Enter the Rating Scale Description (optional).
27. The start date (From date field) defaults to today's date. You can override this value if needed.
28. The end date (To date field) is used to inactivate the Rating Scale.
29. Enter the Order of the Skill Level (lowest number is highest in rank).
30. Enter the Level Name.
31. Enter the Level Description (optional).
32. The start date (From date field) defaults to today's date. You can override this value if needed.
33. The end date (To date field) is used to inactivate the Level.
34. Save your work.

Assigning Skills to Tasks

If a task has skills assigned, Advanced Scheduler can take these skills into account when searching for the best possible resource to do the job. Learn from this procedure how to assign skills and skill levels to Tasks.

Use this procedure to assign skills and skill levels to tasks.

Prerequisites

Skills and skill levels are set up.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, choose Skills Assignment to Tasks. Alternatively, go to Navigate on the tool bar and choose Skills Assignment.
The Find Tasks window is shown. The Skills Assignment window is opened directly if a task is active only.
2. Enter the search criteria and click Find.
The Result Window form appears.
3. Select a task by double-clicking one of the Results lines or by selecting a line and clicking OK.
The Skills Assignment window is opened for the selected task (the task details are filled in the header part of the window).
4. Select the Task tab.

5. Select the Skill Type from the Skill Type list of values.
6. Select the Skill Name from the Skill Name list of values.
The Skill Description - if setup - is displayed automatically.
7. Select the Skill Level from the Skill Level list of values.
8. Check the Disable Skill checkbox only if Advanced Scheduler should not take this skill into account.
9. Save your work.
10. Click the Next button to continue assigning skills for the next task from the Results Window.
11. Click the Previous button to continue assigning skills for the previous task from the Results Window.
12. Select the flashlight icon to open the Find Tasks window again.

Assigning Skills to Task Templates

If a task has skills assigned, Advanced Scheduler can take these skills into account when searching for the best possible resource to do the job. Learn from this procedure how to assign skills and skill levels to Task Templates.

Use this procedure to assign skills and skill levels to task templates.

Prerequisites

- Skills and Skill levels are set up.
- Task Templates are set up.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

(Alternatively) Field Service Dispatcher > Skills Assignment to Task > Task Template tab

Steps

1. From the Dispatch Center, go to Navigate on the Toolbar and select Skills Assignment.
2. Close the Find Task window and choose the Task Template tab on the Skills Assignment to Task window.
3. Select the Task Template group name from the Task Template Group Name list of values.
The Task Template Description, start date (From date field), and end date (To date field) values are displayed automatically.
4. Select the Task Template from the Task Template list of values.
5. Select the Skill Type from the Skill Type list of values.

6. Select the Skill Name from the Skill Name list of values.
The Skill Description (if set up) is displayed automatically.
7. Select the Skill Level from the Skill Level list of values.
8. Check the Disable Skill checkbox only if Advanced Scheduler should not take this skill into account.
9. Save your work.

Access Spares Management

Access to Spares Management from the Dispatch Center allows you to search for parts. This is possible throughout all inventory organizations and subinventories. Use this procedure to search for certain parts. From the Dispatch Center, go to Navigate on the toolbar and select Spares Management. The Parts Search user interface is opened.

For more information on Parts Search, see .

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

View Resource Addresses and Sub Inventories

A typical field service organization may have hundreds and even thousands of field service representatives. This window is designed to provide an efficient method for viewing ship to addresses and subinventories for your field service representatives. Perform the following procedure to view the ship-to addresses and sub-inventories of a field service representative:

From the Dispatch Center, go to Navigate on the toolbar and select Resource Addresses and Sub inventories.

Prerequisites

- Field service representatives must be defined as employees.
- Sub inventories must be defined.
- Spares Management must be installed and setup.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, select Resource Addresses and Subinventories from Navigate on the toolbar. Alternatively, from the Plan Board tab, right-click on a resource name and choose Resource Addresses and Sub inventories.

The Resource Addresses and Sub-inventories window is opened. If you right-clicked from the Plan Board, the window is populated with the selected resource's information.

2. To query a new resource, from the toolbar, choose Query By Example > Enter and then enter a partial value for the Resource Type and/or Resource Name.
3. Navigate to Query By Example and select Run.

The window populates with the resource information. There are two tabs of information: Addresses and Subinventories.

4. You can add or delete information at this time.
5. When you are finished, save your work.

View the Parts Requirement of a Task

When a field service representative requires additional parts to complete a service request task, he usually notifies the dispatcher. The dispatcher then creates a follow-up task and uses the functionality provided in the Spares Management Parts Requirement form to generate an internal order for the required parts.

When parts are required to resolve a task, the Spares tab gives you an overview of the needed spare parts. Use the following navigations paths to view the required parts to resolve the task.

For more information on using the Parts Requirement UI, see ., page 4- 1

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

There are several ways to navigate to the Parts Requirement UI:

- Field Service Dispatcher > Dispatch Center > Navigate > Parts Requirement.
- Field Service Dispatcher > Dispatch Center > Plan Board > Right-click on a task (Tasks list) > Parts Requirement.
- Field Service Dispatcher > Dispatch Center > Right-click on a task (Tasks list) > Parts Requirement.
- Field Service Dispatcher > Dispatch Center > Spares > Select Requirement number (hyperlink) > Parts Requirement.

The Parts Requirement window is opened.

Working with the Plan Board

The Plan Board provides information on a service representative's schedule in a daily view. From the Plan Board you can also start a debrief report, assign a task, send a message, access the source document, recalculate a trip, optimize a trip, block / unblock a trip, view the required parts for a task, get the resource's addresses and sub inventories, and get resource details.

Also Field Service's advanced color coding feature makes the various tasks within the Plan Board easily identifiable, by changing the colors of the cells in the plan board, depending upon a number of factors, including the task's priority, status type or plan option. Color coding setup is done during implementation and can be modified to fit your business needs.

For more information, see the *Oracle Field Service Implementation Guide*. The following procedure details how to use the Plan Board.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, select the Plan Board tab.
The tasks and trips for the current day for the group of service representatives you are monitoring are shown.
2. Click More to enlarge the plan board.
3. Select Date to change the date to view.
4. Click Goto to focus on a specific service representative.
5. Choose the resource name you want to focus on from the list of values.
The service representative's name is highlighted and visible on the plan board.
6. Right-click the service representative's name on the plan board to display the list of options available. Selecting each of these will result in a related pop-up window.
 1. Click Commit Schedule to commit the resource's schedule.
 2. Click Resource Information to view service representative details such as Name, Phone number, and Email address.
 3. Click Resource Addresses and Subinventories to view the resource's addresses and sub inventories. You can add an address for the resource at this time.
 4. Click Skills Management to view the resource's skills and corresponding skill levels. The Resources tab of the Skills Management form is opened for the selected resource. You can also navigate to the Skills and Skill Level tabs for related information. See for more details

5. Click Trips Management to view the resource's current schedule. From the Trips Management popup window, you can Unplan or Reschedule tasks, or Block or Unblock trips for a specified day.
7. Right-click a task on the plan board to display the list of options available. Selecting each of these will result in a related pop-up window.
 1. Click Show Source Document to open the window the task is created from.
 2. Click Debrief to report on or view a report of a performed task.

The Debrief window opens.
 3. Click Send Message to send a message to another user.
 4. Click Schedule Advise to assign a task to the service representative.

The Scheduling Advice window opens with the service representative's name populated in the My Suggestion field.
 5. Select Parts Requirement to view the required parts for the selected task.

The Parts Requirement window is opened for the selected task.
8. Right-click a departure task on the plan board to bring up a popup menu.
 1. Click Block this Trip to block a trip. As a result, the trip will no longer be available when scheduling a task. This function is available only for an empty trip (so not containing any tasks) that is not yet blocked.
 2. Click Unblock this Trip to undo the block of a trip. This function is available only for an empty trip (so not containing any tasks) that is blocked.
 3. Click Optimize Trip to optimize the trip. This might affect the tasks order in the trip. This function is available only when Advanced Scheduler is installed.
 4. Click Recalculate Trip to eliminate time conflicts within the trip. The tasks order in the trip will not be altered. This function is available only when Advanced Scheduler is installed.
9. To view other service representatives, choose Select Territories from the Navigate menu on the tool bar.

Working with the Gantt

Use the gantt to view progress on the service representative schedules or for task assignment. A time line is shown to indicate the current date and time. Use this procedure to explore the different tools and options available for task management through the use of the gantt.

In previous releases of Field Services colors for task were hard coded with the following configurations: Shifts were indicated in yellow. Scheduled tasks showed up in blue bars, escalated tasks showed up in red bars, and travel time was shown as a transparent beginning of a scheduled task (Advanced Scheduler functionality).

Although you can still configure your Dispatch Center to display that configuration (by setting the "CSF: Use Custom Color Coding Scheme" profile option to No), you can now use enhanced color coding for tasks, which is user extensible and available for the following conditions:

- Task Type

- Task Priority (i.e. Task Assignment Status)
- Plan option

Use the scroll bars in the Resource section and gantt chart to view more details or dates.

Prerequisites

None

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, select the Gantt tab.
Service representatives, along with their shifts and assigned tasks, are displayed.
2. Click More to enlarge the gantt.
3. Select a date at From and To to define a date range you want to view.
4. Click Goto to focus on a specific service representative's schedule.
The service representative's name is highlighted and visible.
5. Right-click the date or time on the Gantt chart header to change the view of the Gantt chart.
You can choose from one of the following options: 15 Minutes, 30 Minutes, Hours, Three Hours, Six Hours or Days.
6. View a task description by moving the mouse over a task. Wait a moment and a task description is shown.
7. To view task details, double-click a task.
The source document opens, showing the task details. For example, for a service request task the Service Request window opens.
8. To view task-related details, navigate the mouse over the task bar you want to view, right-click and choose Task Related Info.
The Task Related Info popup window displays information relating to the specific task including product, task customer, and required skills information. It also contains both planned and actual start and end time information.
9. You can optionally move a task from one service representative to another by dragging and dropping it.
Note: When you use drag and drop, no check is performed to confirm whether it is the best option or even a possible option.

Working with the Map

The Dispatch Center provides a geographical representation of a territory that includes a display of the service technicians you are managing. This display includes an easy-to-view status for the current date.

The map facility of the dispatch center allows the dispatcher to see a full range of views, from the highest level view of the map area, to the most detailed level.

At the highest level, the map details states and countries outlined, major roads and waterways and label names of state capitols and major cities. At the detailed level, the map displays all roads (name included), including on and off ramps, city area definitions, regional features, and major landmarks.

Use this procedure to learn the possibilities of using the map. You can use the map for monitoring as well as scheduling purposes.

Prerequisites

A spatial data product must be installed and running for map display.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center select the Map tab.
The service technicians you are managing are shown.
2. You can also click Reset to show the map in its entirety when only a fragment is shown.
3. To change the map, choose it from the list of values in the Service Area.
4. Click More to enlarge the map.
5. Click Goto to focus on a specific service technician.
6. In the Zoom section, you can use the In and Out buttons to control the detail of the area of the map display.
7. The four arrow buttons in the Navigate section, enable you to change the visual display of the map by moving it up, down, left or right.
You can also draw a box on the map with your mouse to zoom in to that particular area.
8. To view a task or tasks on the map, select them from the task list by checking them and click Show from the Tasks area.
The selected tasks, along with their locations, are shown on the map.
9. Double-click on a task for details.
The Service Request window opens, showing the Task tab.

10. To assign a task to a service technician, check a task from the task list and choose a service technician.

The Schedule Advise UI or Oracle Advanced Scheduler (if installed) opens. The service technician is defaulted as the option for My Suggestion.

11. Click Clear to remove the tasks from the map.

Note: The tasks remain checked in the task list.

12. Click Save to save your current map settings.

This is used to display the map the next time you use the map.

Scheduling Tasks

There are different ways to schedule tasks from the Dispatch Center. Choose one of the following options to learn more about scheduling tasks.

Options for scheduling are:

- Scheduling a Task Manually, page 2-20
- Selecting a Schedule Option:
 - Scheduling Using the Unassisted Option, page 2-21
 - Scheduling Using the Assisted Option, page 2-22
 - Scheduling Using the Window to Promise, page 2-23
 - Scheduling Using the Intelligent Option, page 2-24
- Scheduling a Task for Multiple Resources, page 2-25
- Scheduling a Task or Tasks Automatically, page 2-25
- Viewing Failed Autonomous Schedule Assignments, page 2-26
- Optimizing a Service Representative's Trip, page 2-27
- Recalculating a Service Representative's Trip, page 2-27
- Recalculating All Trips, page 2-28
- Canceling a Scheduled Task, page 2-29
- Re-assigning a Scheduled Task, page 2-29
 - Re-assigning a Scheduled Task from the Gantt chart, page 2-29
 - Re-assigning a Scheduled Task from the Plan Board, page 2-30

Scheduling a Task Manually

You can manually assign a task to one or more field service representatives in three ways:

- From the Plan Board (right-click on a task)
- From the Dispatch Center (Advise button)
- From the Tasks list (right-click on a task)

The Scheduling Advice window is always opened to assist you in the assignment. When the Advanced Scheduler is installed all options for scheduling are available to you. When

the Advanced Scheduler is not installed only the Assisted and Unassisted options are available and you make use of Schedule Advise UI functionality.

When scheduling from the plan board or map, you make a suggestion for a field service representative to be taken into account when the scheduling criteria are applied. When based on the scheduling criteria no suitable service representative was found, your suggestion is still presented as an option. When scheduling from the Dispatch Center (Advise button) only those service representatives that are suitable based on the scheduling criteria applied are presented to you. It could happen no service representatives are found.

Use this procedure to schedule a single task manually.

Prerequisites

Make sure you read The Scheduling and Task Assignment Process, page 1-21 to understand this procedure.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, populate the Tasks list with tasks.
2. There are several options to plan manually, choose one of the following:
 - In the Tasks list, select the checkbox next to the task you want to schedule and click Advise
 - In the Tasks list, right-click the task you want to schedule and select Schedule Advise from the popup menu
 - From the Plan Board, right-click the task you want to reschedule and select Schedule Advise from the popup menuThe Scheduling Advice window is opened.
3. Choose an Assistance Level to help you with the assignment. For more information please refer to Selecting a Schedule Option or choose one of the following options directly:
 - Scheduling Using the Unassisted Option, page 2-21
 - Scheduling Using the Assisted Option Scheduling, page 2-22
 - Scheduling Using the Window to Promise, page 2-23
 - Scheduling Using the Intelligent Option, page 2-24

Scheduling Using the Unassisted Option

Use the Unassisted option to assign a task to a resource of your choice. None of the criteria or Advanced Scheduler features are applied. This means that if parts are required for the task, you need to order them separately.

Prerequisites

Make sure you read Scheduling and Task Assignment Process, page 1-21 to understand this procedure.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click Unassisted.
4. In the My Suggestion region make an entry for the resource Type or Name.
5. Click Search. The resource or resources are displayed in the Advice tab.
6. Double-click on a resource of your choice. The Start and End fields are populated with the scheduled date.
7. Click Schedule. A task assignment is created.
8. The plan board and gantt are refreshed.

Scheduling Using the Assisted Option

Use the Assisted option to assign a task to a resource based on a selection of criteria using Schedule Advise UI functionality. Spare parts availability is not taken into account. This means that if parts are required for the task, you need to order them separately.

Prerequisites

Make sure you read Scheduling and Task Assignment Process, page 1-21 topic.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click Assisted.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, a resource recommended from Installed Base or Skills. Also select if you want to check resources availability.

5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. Click Search.
The qualified resources found are displayed in the Advice tab. Already assigned tasks show up in blue, schedule options show up in green.
7. Double-click on a resource of your choice. The Start and End fields are populated with the scheduled date.
8. Click Schedule.
A task assignment is created and the plan board and gantt are refreshed.

Scheduling Using the Window to Promise Option

The Window to Promise option is only available when Advanced Scheduler is installed. Use the Window to Promise option to assign a time slot to a resource based on a selection of criteria using Advanced Scheduler functionality. Displayed are possible time slots to offer a customer with related cost.

After task assignment with the Window to Promise a time slot is reserved for a customer and the Planned Start and End dates are set accordingly. A time slot is also assigned to a resource but later in the process you can choose to optimize the assignment by assigning it to another resource or by optimizing the resources trip.

Prerequisites

Advanced Scheduler is installed. Make sure you read Scheduling and Task , page 1-21 Assignment Process topic.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click Window to Promise.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, a resource recommended from Installed Base or Skills. Also select if you want to check resources availability.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. In the Spares region choose an Availability Condition from the list of values. For more information on availability conditions please refer to Understanding Advanced Scheduler.
7. Click Search. The possible time slots with related cost are displayed in the Advice tab.

8. Select an option from the list of values at View Window to view only the options for a certain time slot.
9. Select a time slot of your choice and click Schedule. The Planned Start and End date for the task is set accordingly. A task assignment is created.
10. The plan board and gantt are refreshed.

Guidelines

The time slot with the lowest cost addressed is in most cases the best option to offer your customer.

Scheduling Using the Intelligent Option

The Intelligent option is only available when Advanced Scheduler is installed. Use the Intelligent option to assign a task to a resource based on a selection of criteria using Advanced Scheduler functionality.

Prerequisites

Advanced Scheduler is installed. Make sure you read the The Scheduling and Task Assignment Process topic in What is the Field Service Dispatch Center?, page 1-14

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click Intelligent.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, a resource recommended from Installed Base or Skills. Also, select if you want to check resources availability.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. In the Spares region, choose an Availability Condition from the list of values. For more information on availability conditions, please refer to Understanding Scheduler.
7. Click Search.
The qualified resources with related cost found are displayed in the Advice tab.
Already assigned tasks show up in blue, schedule options show up in green. Travel time in between tasks are transparent.
8. Double-click on a resource of your choice. The Start and End fields are populated with the scheduled date.
9. Click Schedule. A task assignment is created.

Scheduling a Task for Multiple Resources

You can assign a task to multiple resources, this can only be done assisted by the Schedule Advise UI and has to be done manually.

Use this procedure to assign a task to multiple resources.

Prerequisites

Make sure you read Scheduling and Task Assignment Process, page 1-21 topic.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. Navigate to the Scheduling Advice window.
2. Select the Preferences tab.
3. Click Assisted.
4. In the Resources region make a selection of Territory Qualifiers, a preferred resource defined in Contracts, or a resource recommended from Installed Base. Also select if you want to check a resources availability.
5. In the My Suggestion region enter a resource Type or Name if you want it to be considered as a plan option in addition to previous selections made.
6. Click Search.

The qualified resources found are displayed in the Advice tab. Already assigned tasks show up in blue, schedule options show up in green.
7. Select a resource of your choice and to add it to an already assigned task, check the Add Resource checkbox.
8. Click Schedule. A task assignment is created.

Scheduling a Task or Tasks Automatically

You can schedule a single task or multiple tasks automatically directly from the dispatch center. The scheduling criteria applied come from Advanced Scheduler and use default settings. It is also possible to run a concurrent program, Autonomous Scheduler, that schedules tasks automatically in the background without interference of a dispatcher. This is setup at implementation.

Use this procedure to schedule a single task or multiple tasks automatically from the Dispatch Center.

Prerequisites

Advanced Scheduler is installed. Make sure you read The Scheduling and Task , page 1-21 Assignment Process topic.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, populate the Tasks list with tasks.
2. Check the box next to the task you want to schedule. To check all tasks at once choose Select All Tasks from the Tools menu on the toolbar.
3. Click Auto Schedule.

The plan board and gantt are refreshed. When during the scheduling process an assignment for a task fails, you are prompted with an error message telling you why scheduling failed. Resolve the issue for the task. The Auto Schedule process needs to be re initiated to schedule the remainder of the tasks.

Viewing Failed Autonomous Schedule Assignments

Use this procedure when a concurrent program, Autonomous Scheduler, is active that schedules tasks automatically in the background without involvement of a dispatcher. The program picks up tasks to schedule at set time intervals. This is Advanced Scheduler-specific functionality.

When Advanced Scheduler is not able to schedule a task for some reason, the task status is set to Auto Rejected. This enables you to find failed tasks more easily from the Dispatch Center. An output file is generated with a problem description for the failed task. When the problem for the task has been resolved, change the status back to a can be scheduled status.

Use this procedure to view the output file with the problem description for the task.

Prerequisites

Advanced Scheduler is installed.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Other > View Requests

Steps

1. Open the Find Requests window.
2. Click Submit a New Request.
The Submit a New Request window is opened.
3. Choose the Single Request option.
4. Click OK.
The Submit Request window is opened.

5. At Name, choose Autonomous Auto Schedule from the list of values and click OK.
6. Click Submit.
The Decision window is opened.
7. Click No.
You will return to the Find Requests window.
8. Click Find.
The Request window is opened.
9. Look for the requests with the Name Autonomous Auto Schedule. Check the Phase and Status. If Phase is Completed and the Status is something other than Normal, something went wrong during the process of assigning a task to a resource when executing the Autonomous Auto Schedule program.
10. Click View Output to view the output file with the problem description for the task.

Optimizing a Service Representative's Trip

You can use the Field Service Optimize Trip functionality to recalculate and optimize the travel times for each task in a trip for a single resource.

In doing so, the "cost" of the trip is refigured and, if the new cost for the recalculated trip is less than the previous trip, then the trip is updated with the new information.

The cost calculations (i.e cost penalty points) that are set up in Scheduler determine the order in which tasks are prioritized on a trip. During optimization, Advanced Scheduler un schedules all tasks in the trip and then reschedules them one by one to best, or most cost effective, position.

Use this procedure to optimize a service representative's Trip. This might affect the task's order in the trip.

Prerequisites

Advanced Scheduler must be installed.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Field Service Dispatcher > Tools > Optimize Trip

Steps

1. From the Dispatch Center, open the Plan Board tab.
2. Right-click on a departure task and choose Optimize Trip.
The function is carried out immediately.

Recalculating a Service Representative's Trip

Advanced Scheduler uses the field service recalculate functionality to prioritize tasks in such a way that each task is scheduled to begin at the earliest possible starting time. This

feature takes into account the planned start date and time of the task, as well as the scheduled end date and time of the previous task and includes travel time.

During the recalculation, a task's order will not be altered. If there are any gaps or overlaps in the trip, these are removed and travel times are recalculated.

This feature also allows a user to manually make changes to the trip without invoking Advanced Scheduler. If a user needs to add tasks to a trip or changed planned dates, for example, recalculating the trip makes it feasible again.

Use the following procedure to update and optimize a service representative's trip after task assignment and before task commitment.

Prerequisites

Advanced Scheduler must be installed.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, choose the Plan Board tab.
2. Select the service representative's name and right-click it.
The popup menu appears.
3. Click Recalculate Trip.

Recalculating All Trips

If you want to recalculate the trips of all the resources on the plan board, you can use the Recalculate All Trips functionality of Field Service. In doing so, all time gaps and overlaps in a particular trip are removed and travel times are recalculated, but the tasks order in the trip will not be altered.

Use the following procedure to update and optimize all service representatives trips shown on the plan board after task assignment, and before task commitment.

Prerequisites

Advanced Scheduler must be installed.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, select the Plan Board tab.

Make sure all the service representatives you want to recalculate the trips for are shown on the plan board.

Refer to *Selecting Territories*, page 2-10 to reference the procedure to do so.

2. From the Tools menu select Recalculate All Trips.

Canceling a Scheduled Task

To cancel a scheduled task you need to cancel all task assignments for the task. Once a task is canceled you can choose to schedule it again or close it.

Use this procedure to cancel a scheduled task or task assignment.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. Populate the Tasks list with the task.
2. Select the task.
3. Select the Resources tab.
4. Change the task assignment Status for each resource to Cancelled.
5. Click Save.
6. Click Refresh, the task status is changed accordingly.

Re-assigning a Scheduled Task

Use either of the following procedures to assign an already assigned task from one service representative to another.

- Re-assigning a Scheduled Task from the Gantt chart, page 2-29
 - Re-assigning a Scheduled Task from the Plan Board, page 2-30

Re-assigning a Scheduled Task from the Gantt chart

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, select the Gantt tab.
2. Select a task in the service representative's trip, drag and drop it onto the service representative you want to assign the task to.

Note: When using drag and drop, no check is performed if it is the best or even a possible option.

3. Click Undo to cancel the drag and drop action.

Re-assigning a Scheduled Task from the Plan Board

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, select the Plan Board tab.
2. Right-click on Task and choose Scheduling Advise.
The Scheduling Advice window is opened.

Identify and Change Invalid Addresses

When scheduling tasks, often times a dispatcher will encounter situations where the customer's address in the system is invalid. For example, if the address was entered incorrectly by a representative in a call center. As a result, if you are using automatic scheduling through Oracle Advance Scheduler, the application can't link up a technician with a task and the task remains unscheduled.

To address this issue, Field Service provides a program that identifies invalid addresses and allows a dispatcher to modify the addresses to correct the problem.

Field Service takes into account the following address criteria when determining whether or not it is invalid:

- Address
- City
- State
- Zip code
- Country

Identifying and changing invalid addresses is a three-step process, whereby you run the Find Invalid Address concurrent program to identify the addresses, query the

system from the dispatch center to identify all the invalid addresses for that appear for a particular day, and then change and validate the addresses.

The following sections detail this process:

- Run Invalid Addresses Concurrent Program, page 2-31
- Change Invalid Addresses, page 2-31

Run Invalid Addresses Concurrent Program

To run the Invalid Addresses concurrent program, follow these steps.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Field Service Setup > Find Invalid Addresses

Steps

1. Open the Find Invalid Addresses concurrent program.
You can either schedule the program to run automatically, or run it on demand.
2. To run the program, click Submit.
There are no parameters to fill.
3. You will see a confirmation popup window with the service request number. Write down the number and click No.
4. Check the status of the concurrent program by navigating to View > Requests in the toolbar.
5. Run the Find Requests query.
6. When the request is completed, you can query the invalid addresses from the Dispatch Center.

Change Invalid Addresses

To change invalid addresses, follow this procedure.

Prerequisites

You must run the Field Invalid Addresses concurrent program.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Field Service Dispatcher > Change Invalid Address

Steps

1. In the tasks section of the Dispatch Center, choose Invalid Address in the View By field.

This displays all the tasks that have been identified as having an invalid address associated with them for the day that the query is run (i.e. today).
2. Right-click the task for which you want to change the address and select Change Invalid Address.

This opens the Change Invalid Address window, which contains the information for the specific task that you selected. Alternatively, if you call the Change Invalid Address window from the main menu (Field Service Dispatcher > Change Invalid Address), the spread table will contain all tasks with invalid addresses, which you can select and change one at a time.
3. In the Address tab, the current invalid address is displayed along with the error message. The fields you can edit are Address1, City, State, Zip Code and Country. Make the appropriate changes to the addresses.
4. Once you have made changes, click Validate Address to ensure that the new values you entered represent a valid address.
5. Click the Logged Errors tab to see a detailed error message regarding the invalid address.

Once you have changed and validated the address, the task will be removed from the spread table that displays all the invalid addresses.

Manage Field Service Resource Availability

Through the Trips Management UI, a dispatcher can easily block the trips of a single field technician or multiple technicians, temporarily freezing the schedule in the process. You can also unplan or reschedule the technician's tasks. This function is necessary in the event that a field technician unexpectedly becomes unavailable. In this case, the dispatcher can not only unplan and/or reschedule tasks, but can block Scheduler from automatically scheduling any further tasks for the technician.

By default, the Trips Management UI displays all the field technicians associated with the selected territory for the dispatcher. If you navigate to this window by right-clicking on a resource (in the Plan Board or Gantt) the Trips Management UI will contain only the resource selected.

This section covers the following procedures:

- Block Trip
- Unplan Task
- Reschedule Task
- Unblock Trip

Block Trip for Technician

From the Trips Management UI, a dispatcher can block a single trip or multiple trips, the latter by entering a date range. This action prevents new assignments being made for a technician and temporarily freezes the task assignments in the blocked trip. Use the following procedure to block a technician's trip.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Use the following navigation paths to access the Trips Management UI:

Field Service Dispatcher > Dispatch Center > Navigate > Trips Management

Field Service Dispatcher > Dispatch Center > Plan Board tab or Gantt tab > Right-click Resource Name > Trips Management

Note: If you navigate to the Trips Management UI from the Plan Board or the Gantt, only the resource you selected will be displayed.

Steps

1. From the Trips Management UI, select the technicians that you want to block trips for by choosing the Selected checkbox next to the resource name.
You can select as many technicians as you like to block trips for. If you want to block trips for all technicians, click the Select All check box.
2. In the Trips section, choose the Start and End dates and times for the trips you want to block.
The entire block of time within the start and end date and time will be blocked.
3. In the Actions section of the UI, choose Block in the Trips field.
4. Click OK.
The trips for the date range you specified are blocked and reflected in the Plan Board and the Gantt.

Guidelines

You can block trips and unplan or reschedule tasks at the same time through the Trips Management UI.

Unplan Task for Technician

If a task assignment has not been completed or "closed," it can be unplanned from the Trips Management UI. If an assigned task has been committed to a field technician's mobile device, the task can be unplanned and rescheduled. Unplanning such asks will automatically send cancellations to the mobile device.

Use the following procedure to unplan tasks.

Prerequisites

A task must be schedule and assigned to a technician and it must have a status other than "completed" or "closed."

Responsibility

Field Service Manager

Navigation

Use the following navigation paths to access the Trips Management UI:

Field Service Dispatcher > Dispatch Center > Navigate > Trips Management

Field Service Dispatcher > Dispatch Center > Plan Board tab or Gantt tab > Right-click Resource Name > Trips Management

Note: If you navigate to the Trips Management UI from the Plan Board or the Gantt, only the resource you selected will be displayed.

Steps

1. From the Trips Management UI, select the technicians that you want to unplan tasks for by choosing the Selected checkbox next to the resource name.

You can select as many technicians as you like to block trips for. If you want to unplan tasks for all technicians, click the Select All check box.

2. In the Trips section, choose the Start and End dates and times for the tasks you want to unplan.

The entirety of the task must fall within the start and end dates and times that you choose.

3. In the Actions section of the UI, choose Unplan in the Tasks field.
4. Click OK.

A popup window displays a message confirming that you are unplanning one or more tasks.

5. If you are sure you want to unplan the tasks, click OK on the popup message.
A second message confirms the number of tasks you unplanned.
6. Click OK to close this window.

The tasks are unplanned.

Note: You can block trips and unplan tasks during the same specified period at one time by choose Block and Unplan at the in the respective Actions fields.

Guidelines

To unplan a specific task for a technician, you can right-click the task in the Plan Board and choose the Unplan Task option.

Reschedule Technician's Tasks

In the event that tasks have been scheduled and assigned to a technician who, for some reason, becomes unavailable, a dispatcher can reschedule the task or tasks through Trips Management. You can also reschedule tasks for multiple technicians and multiple task for a specified period of time.

Use the following procedure to reschedule tasks.

Prerequisites

At least one task must be assigned to a technician.

Responsibility

Field Service Manager

Navigation

Use the following navigation paths to access the Trips Management UI:

Field Service Dispatcher > Dispatch Center > Navigate > Trips Management

Field Service Dispatcher > Dispatch Center > Plan Board tab or Gantt tab > Right-click Resource Name > Trips Management

Note: If you navigate to the Trips Management UI from the Plan Board or the Gantt, only the resource you selected will be displayed.

Steps

1. From the Trips Management UI, select the technicians that you want to reschedule tasks for by choosing the Selected checkbox next to the resource name.

You can select as many technicians as you like to reschedule tasks for. If you want to reschedule tasks for all technicians, click the Select All check box.

2. In the Trips section, choose the Start and End dates and times for the tasks you want to reschedule.

The entirety of the task must fall within the start and end dates and times that you choose.

3. In the Actions section of the UI, choose Unplan in the Tasks field.

4. Click OK.

A popup window displays a message confirming that you are unplanning one or more tasks.

5. If you are sure you want to unplan the tasks, click OK on the popup message.

A second message confirms the number of tasks you unplanned.

6. Click OK to close this window.

The tasks are unplanned.

Note: You can block trips and reschedule tasks during the same specified period at one time by choose Block and reschedule in the respective Actions fields.

Unblock Technician Trips

Using Trips Management functionality, you can unblock trips for technicians that have previously been blocked. You can unblock at the trip or technician level and you can also unblock trips for a specified date range, for multiple technicians, or both.

Use the following procedure to unblock technician trips.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Use the following navigation paths to access the Trips Management UI:

Field Service Dispatcher > Dispatch Center > Navigate > Trips Management

Field Service Dispatcher > Dispatch Center > Plan Board tab or Gantt tab > Right-click Resource Name > Trips Management

Note: If you navigate to the Trips Management UI from the Plan Board or the Gantt, only the resource you selected will be displayed.

Steps

1. From the Trips Management UI, select the technicians that you want to unblock trips for by choosing the Selected checkbox next to the resource name.

You can select as many technicians as you like to unblock trips for. If you want to unblock trips for all technicians, click the Select All check box.

2. In the Trips section, choose the Start and End dates and times for the trips you want to unblock.

The entire block of time within the start and end date and time will be blocked.

3. In the Actions section of the UI, choose Unblock in the Trips field.
4. Click OK.

The trips for the date range you specified are unblocked and reflected in the Plan Board and the Gantt. Once unblocked, the technicians that were previously blocked become automatically available for task and trip assignments, including automatic scheduling by Scheduler.

Committing the Schedule

You have to commit the schedule so it gets communicated to the service representatives. Also at commitment, any parts reservations created by Advanced Scheduler at task assignment are ordered when the schedule is committed. Committing the schedule can be done manually as well as automatically. For automatic commitment a concurrent program runs in the background. This is setup at implementation.

Use this procedure to change task status for all tasks for a selected date manually.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Any of the three following navigation paths will open the Commit Schedule window:

Field Service Dispatcher > Dispatch Center > Navigate > Commit Schedule

Field Service Dispatcher > Commit Schedule (main menu)

Field Service Dispatcher > Dispatch Center > Plan Board tab > Right-click resource name > Commit Schedule

Steps

1. From the Commit Schedule window, select the Schedule tab.
2. Indicate the date to the commit schedule for at Time Frame.

This could be for schedules created in the past hour, but also for one or more days.

When the function has been started by right-clicking a resource name in the plan board, the 'From' date field contains the active date of the plan board. In the other cases, the 'From' date contains the current date. In all cases, the default 'To' date is the 'From' date + 1.

When this area is left blank, all schedules found for the selected task status are committed.

3. At Resource define a specific resource or a resource group to commit the schedule for.

When starting the function by right-clicking a resource name in the plan board, the resource name is filled in already. When this area is left blank, all schedules for the selected task status are committed.

In the Parts section, leave the Include Orders Due checkbox blank. This functionality is not enabled.

4. Select the Options tab.
5. Make a selection from the list of values at From and To to define the tasks status transition at commitment.
6. Click OK.

The schedule is committed. The Task Status is changed to the status defined at To in the previous step.

Reporting on Tasks

In Debrief you can report on labor time, parts used, expenses made, and record counter readings.

Use this procedure to start or open a Debrief for a task from the Dispatch Center.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps.

1. From the Dispatch Center, select the Plan Board tab.
2. Select the task you want to report on and right-click it.
The popup menu appears.
3. Click Debrief.
The Debrief window is opened with the task information populated.
For more information, see Using Debrief, page 3- 1 .

Viewing Service History

Field Service provides an extensive search mechanism to view service history relating to several potential areas of interest, including customer, site, product, problem or resolution. Furthermore, you can make extensive text searches based on key words for both Summaries and Notes.

Service history is valuable when determining whether or not to increase or decrease a customer's service agreement and to determine if multiple calls are related. Furthermore, it can be used to determine if there is significant hardware or software failure, which is leading to multiple service requests.

You can query service history for a particular customer linked to an open task from within the Dispatch Center. The profile option CSF: Default Service History Display determines which query is executed. For example, if you have the profile option set to Customer, all service requests associated with the particular customer will appear. Other possible values include: Site, Item, or Instance.

Two other profile options -- CSF: Service History Time Frame Number and CSF: Service History Time Frame UOM -- determine the default amount of time for which you want to retrieve the service history. For example, if you set 30 for the number, and Days for UOM, then your service history search will cover the past 30 days. UOM values include: Days, weeks, months, years.

Once you perform a search, the results are displayed in the spread table. In this table, you can see request number, creation date, item, item description, customer name and number, item instance, problem and resolution codes, summary, request type, status, severity, urgency and contact name. You can click the service request number of any of the service requests you want to view. This will open the Service Request form.

Use this procedure query and view service history.

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Service History

Field Service Dispatcher > Dispatch Center > Navigate > Service History

Steps.

1. Open the Service History window through the above navigation options.
2. Choose a search criteria.
If you choose more than one search criteria, for example customer name and item, both criteria must be met to return a value.
3. Click Search.
The Results spread table is populated with the service requests that meet your search criteria.
4. Click the Service Request number hyperlink to view a particular service request.
5. To perform a search using different criteria, click Clear and enter the new criteria and click Search.
6. If you want to change the Time Frame of your search, enter a number and choose a new UOM.

Viewing the Service Request Details

When the task originates from a service request, the Service Request form can be accessed to view all details from the Dispatch Center. Use this procedure to access the Service Request form.

Also covered in this section is the following topic:

- Close Task Automation, page 2-39

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Dispatch Center

Steps

1. From the Dispatch Center, right-click on a Task number in the tasks list for which you want to see the service request.
2. Select Show Service Request from the options list.
The Service Request form is shown, which displays all the information associated with the Service Request for which the task is assigned. For more information on Service Requests, see the *Oracle Teleservice User's Guide*.

Close Task Automation

Under certain circumstances, tasks are closed automatically upon closure of the service request for which they are associated. There are several conditions that must be met to allow automated closure:

- Tasks must have a Task Type attribute of 'Field Service Rule' and have the 'Schedulable' flag set.
- Tasks with the following statuses can be automatically closed: Assigned, Working, Schedulable, Accepted, Rejected, On Hold, Approved, Completed, or Canceled.

For more information on setting up tasks and task types, see the *Oracle Field Service Implementation Guide*.

- Tasks cannot have open debrief lines.

The CSF: Default Auto Close Task Status profile option determines what status will be assigned to any task that is closed automatically. The default value is 'closed.'

Field Service makes several validations to ensure that only appropriate tasks are closed automatically. The validation of the automated closure always ensures that the tasks comply with the Field Service state transitions that are applied to tasks during set up. Furthermore, if a task has the open debrief lines, it will not be closed. For tasks that need to be closed but haven't been scheduled yet, there is no debrief line check.

Scheduled tasks that have only the scheduled start date but need to be closed, will be unplanned during the task automated closure process as long as no actual debrief lines exist.

Using Debrief

This chapter covers the following topics:

- Debrief Summary
- Accessing a Debrief
- Viewing and Creating Notes
- Accessing your Calendar
- Entering Material
- Entering Expenses
- Entering Labor Time
- Recording Counter Readings
- Viewing Onhand Quantity
- Viewing Parts Requirement
- Viewing Service Request
- Updating the Task Assignment Status
- Viewing a Pro Forma Invoice

Debrief Summary

The Debrief module allows field service representatives to access, view, update and report on their individual task assignments. They also can report on materials used at the customer site to resolve the issue, labor time spent, and incurred expenses. The data gathered in the service debrief is used for generating an invoice for the customer, updating the customer's installed base and maintaining the field service representative's trunk stock.

This module also gives service managers the capability to capture, access, and update the debrief information on behalf of their representatives. This topic group provides process-oriented, task-based procedures for using Debrief.

Topics covered are:

- Accessing a Debrief, page 3- 2
- Viewing and Creating Notes, page 3- 3
- Accessing your Calendar, page 3- 4

- Entering Material, page 3- 5
- Entering Expenses, page 3- 8
- Entering Labor Time, page 3- 9
- Recording Counter Readings, page 3-10
- Viewing Onhand Quantity, page 3-11
- Viewing Parts Requirement, page 3-12
- Viewing Service Request, page 3-12
- Updating the Task Assignment Status, page 3-13
- Viewing a Pro Forma Invoice, page 3-14

Accessing a Debrief

You can open a debrief either as a Field Service Representative, in which case you can view and update your own tasks, or as a Field Service Manager, where you have access to the tasks of all your resources.

Use this procedure to create or open a Debrief for a task.

Responsibility

Field Service Representative

Field Service Manager

Field Service Dispatcher

Navigation

Field Service Representative > My Tasks

Field Service Manager > Field Service Dispatcher > Debrief

Field Service Dispatcher > Debrief

Prerequisites

A service request and task to report on.

Steps

1. As a Field Service Representative, if you navigate to My Tasks, the Debrief window opens with the list of all the tasks assigned to the service representative with scheduled start dates less than or equal to the system date.
2. As a Field Service Manager, if you navigate to Debrief from Field Service Dispatcher > Debrief, the Find Tasks window is opened.
3. To use the Find function, place your cursor in any of the fields and select the desired search criteria from the list of values, or enter it.

To search for an Assignee, first choose "Employee" as Assignee Type from the Assignee Type list of values.
4. Click Find.

A spread table with the list of tasks assigned to the specified resource appears in debrief header region. The Debrief number column shows if a debrief has already been created or not.

5. Depending on the record selected in the debrief header, the debrief detail is populated automatically.

Guidelines

Field Service does not allow technicians to create a debrief for those tasks that have the "schedulable" flag enabled. If a technician queries a task where the assignment status has the schedulable flag enabled, the Debrief UI will appear in read-only mode. This feature prevents technicians from entering debrief lines for tasks that have been assigned, but not committed to them yet. For example, if the assignment status "In Planning" has the Schedulable flag enabled, than any task with a task assignment of "In Planning" will be unavailable for debrief update.

Viewing and Creating Notes

At any time during the process of scheduling service requests, assigning tasks and debriefing, a field service representative or call center agent can add a note to a task. In the Debrief window, a field service representative can not only add a Note to a task, but can also view notes that have been associated with a service request task. This feature allows a consolidated view of a task and all the related notes added during the lifecycle of the task. The user also has an option to search on additional notes by clicking the Find icon on the menu and specify the search criteria. (For example, to search on Installed base notes, enter the source as "installed base" and click enter.)

Use the following procedure to view and create notes in Debrief.

For complete details on creating Notes, see the *Oracle Common Application Components User's Guide*.

Prerequisites

Notes button on the debrief window is enabled only if the debrief number is generated.

Responsibility

Field Service Manager
Field Service Representative
Field Service Dispatcher

Navigation

Field Service Manager: Field Service Dispatcher > Debrief > Find Tasks > Debrief

Field Service Representative: My Tasks

Field Service Dispatcher: Debrief > Find Tasks > Debrief

Steps

1. Navigate to the Debrief window.
2. Click Notes.

The Notes window is opened.

Note: The Notes button on the Debrief UI is enabled only after the Debrief number is generated.

When a note was created for this task, you can view it here. In the left panel of the window under the Notes tabs, all notes are listed, including the date the note was entered, who entered the note, the source of the note (task, debrief, etc.), the status, and a brief summary of the note.

3. To view details of a particular note, select the note and it's details appear in the right panel.

4. To create a new note for the task, click New.

The Notes window refreshes. Debrief defaults in the Source Field and the date and Number also are populated.

5. Enter your note in the Text box.

6. Optionally, choose a Type for the note from the list of values.

7. Choose a Status for the Note.

8. Optionally, choose what the note is Related To from the list of values.

9. Select a context value in the Value field from the list of values.

10. To add more details to your note, click More and enter the text in the Detailed Note box.

11. Save your work.

Accessing your Calendar

At any time you can access your Calendar from Debrief. The Calendar is a scheduling tool used to define and view available and non-available time for a resource or group of resources.

Prerequisites

None.

Responsibility

Field Service Manager

Field Service Representative

Field Service Dispatcher

Navigation

Field Service Manager: Field Service Dispatcher > Debrief > Find Tasks > Debrief

Field Service Representative: My Tasks

Field Service Dispatcher > Debrief > Find Tasks > Debrief

Steps

Use this procedure to open your calendar:

1. Navigate to the Debrief window.
2. Click Calendar.

The Calendar window is opened.

Guidelines

You can edit existing tasks and Todo lists or add new ones to the calendar. For detailed instructions, see the *Oracle Common Application Components User Guide*.

Entering Material

When working out in the field, a field service representative needs to report on the materials used. This information is necessary to maintain an adequate supply of materials, maintain the customers installed base, and to be able to invoice the customer for the materials used. You enter materials information at the line level and update inventory, installed base, and charges for a specific line.

The first time that a technician accesses the material tab, the Service Activity Code value defaults from the CSF: Default Debrief Service Activity Code profile option.

Debrief also uses a validation to ensure that a technician has sufficient trunk stock of an inventory item to fill an order entered on the debrief line. If a technician enters a quantity number greater than available trunk stock, an alert message appears. If an organization allows negative balances, this alert will be a warning message. If the organization does not allow negative balances, however, the technician gets an error message and is not allowed to continue creating the debrief line.

If your field service operation uses temporary parts in place of those parts in need of repair, you can account for these transactions in debrief. For details, see *Using*, page 3-7 *Loaner Transactions*.

Use the following procedure to report on material transactions for a task.

Prerequisites

A service request and task to report on. The setup for service activity code should be complete. The item setup should be complete and the items should have the "Service Billable Flag" set to material. The resources should have sub inventories assigned to them. In the case of trackable items, instance number should be generated. The items also need to have a price list associated with it.

Responsibility

Field Service Manager
Field Service Representative
Field Service Dispatcher

Navigation

Field Service Manager: Field Service Dispatcher > Debrief > Find Tasks > Debrief

Field Service Representative: My Tasks

Steps

1. From the Debrief window, select the Materials tab.
2. Choose a Service Activity Code from the list of values.

This is the activity you are going to perform for the material you are reporting on. Based on this selection, fields need to be populated further down the material line. Fields that are white are optional and fields that are yellow are mandatory.
3. The item LOV is filtered based on the service activity code. In case the Update IB flag is checked for a service activity code, the items LOV will display both trackable and non-trackable items else it will display only non-trackable items.
4. The UOM is defaulted, but you can select a different UOM from the list of values, if necessary.
5. Enter the amount of the material used at the Qty field.

In the case of serialized items, Qty is 1.

Note: If a technician enters a quantity number that exceeds that which is available in the current trunk stock, an alert message will inform him that he does not have sufficient quantity to fulfill the order.
6. The LOV for Subinventory is dependent on the line category code defined in the service activity code setup form.

In case the line category code is defined as "Order" the sub inventory gets populated with the default usable sub inventory. The LOV will then display only usable subinventories. In the case where the line category code is "return" the sub inventory gets populated with the default defective sub inventory. However, the LOV for sub inventory will display both usable and defective sub inventories.
7. Enter the Serial Number, Lot, Locator, Revision, and Instance Number details depending on the item attributes.

The LOV for these fields are validated based upon the Item and Subinventory combination.
8. Choose a Service Date from the date list of values.

The system date is defaulted.
9. Optionally, choose a Reason for the material transaction from the list of values.
10. The Disposition field is defaulted once the Item is selected.
11. In case an item is Installed base trackable and the line category code on the service activity code setup form is "Order," the parent product and the recovered product field is enabled.

The parent product LOV displays the list of all the instances installed at the customer location. In case of line category code "Return" the recovered product field is enabled.
12. Optionally, the user can update the parts status on the debrief line.
13. Enter the return reason for the recovered transaction.

14. Click Save.

The material line is saved.

Guidelines

For more details, refer to Updating the Task Assignment Status, page 3-13.

You can create multiple material transaction lines before saving and updating. For replacements you always need at least two material transaction lines, one for the part taken out/removed, and one for the part put back in/installed.

After you have performed an update, you can't modify the transaction lines that have been successfully updated. You can however still add new material transaction lines and update them.

However, Field Service Debrief does not allow you to add new lines in cases where the task assignment status has been closed.

Using Loaner Transactions

Some field service operations provide temporary parts to a customer in place of a part that must be repaired. Field Service Debrief accounts for this scenario by capturing equipment usage details of loaner equipment.

Loaner transactions are identified in debrief based upon the service activity code assigned to them. When a technician is logging a material line with a service activity code of type "loaner" then there will be no change of ownership, as the part is still owned by inventory and not the customer. The customer may be expected to return the by a certain date once the defective part is fixed and shipped to the customer.

In this transaction type, the material line has an enabled Return Date field. A technician can enter the expected date that the loaned part should be retrieved from the customer.

Once the material line is logged, the installed base is updated to reflect that the "instance" owner is still inventory, but the location is the customer site.

Prerequisites

A service request and task to report on. The setup for service activity code should be complete.

The item setup should be complete and the items should have the "Service Billable Flag" set to material. The "Return Req'd" checkbox in Installed Base Transaction type must be enabled to identify the Service Activity Code as a loaner. Also, the Change Owner must be deselected and the Change Owner To field must be blank.

Responsibility

Field Service Manager

Field Service Representative

Field Service Dispatcher

Navigation

Field Service Manager: Field Service Dispatcher > Debrief > Find Tasks > Debrief

Field Service Representative: My Tasks

Field Service Dispatcher: Debrief > Find Tasks > Debrief

Steps

The steps to log a material line for a loaner part are the same as those used to log a regular material line (Entering Material, page 3- 5).

You must choose a Service Activity Code that supports a loaner transaction, as defined in the prerequisites above. The only exception is that the Return Date field is enabled and the technician has the option to enter a date in which the part is expected to be returned.

Entering Expenses

You can use the Expenses tab to report any expenses accrued during a customer visit. Expenses may include a meal, driving costs, etc.

Use the following procedure to enter expenses.

Prerequisites

A task with a status to report on.

Responsibility

Field Service Manager

Field Service Representative

Field Service Dispatcher

Navigation

Field Service Manager: Field Service Report > Find Tasks > Debrief

Field Service Representative: My Tasks

Field Service Dispatcher > Debrief > Find Tasks > Debrief

Steps

1. From the Debrief window, select the Expenses tab.
2. Choose a Service Activity Code from the list of values.
This is the activity you are going to perform for the expense you are reporting on.
3. Select the Item you are going to create an expense line for.
The Item Description field is populated with an extended description for the item. The UOM is defaulted after selection.
4. You can either enter the UOM and Quantity, or the Amount and Currency.
Quantity and Amount are mutually exclusive.
5. Choose a Service Date from the date list of values.
The system date is defaulted.
6. Optionally, choose a Justification for the expense from the list of values.
7. The Channel Code field is populated automatically.

It shows whether the resource that created the debrief is a connected user or a disconnected user. A disconnected user created the debrief from a mobile device.

8. Click Save.

The expense line is saved.

Guidelines

Please refer to Updating the Task Assignment Status, page 3-13 for more details.

You can create multiple expense lines before saving and updating. When you have performed an update you can't modify the expense lines that have been successfully updated. You can however still add new expense transaction lines and update them. However, Field Service Debrief does not allow you to add new lines in cases where the task assignment status has been closed.

Entering Labor Time

When at work out in the field, you need to record the hours spend on a task. Debrief's labor line functionality enables this scenario.

By default, a technician cannot enter overlapping actual start and end times for various assignments during a work shift. You can set the CSF: Allow Overlapping Labor Lines profile option to Yes, if you want to allow overlapping labor times.

Use this procedure to enter detailed labor information.

Prerequisites

A service request and task to report on. If a technician wants to allow overlapping labor times, the CSF: Allow Overlapping Labor Lines profile option must be enabled.

Responsibility

Field Service Manager

Field Service Representative

Field Service Dispatcher

Navigation

Field Service Manager: Field Service Report > Find Tasks > Debrief

Field Service Representative: My Tasks

Field Service Dispatcher > Debrief > Find Tasks > Debrief

Steps

1. From the Debrief window, select the Labor tab.
2. Choose a Service Activity Code from the list of values.
This is the activity you are going to perform for the labor you are reporting on.
3. Select the Item you are going to create a labor line for.
The Item Description field is populated with an extended description for the item.

4. The UOM is defaulted but you can choose to select a different UOM from the list of values.
5. Enter the Start and End time for the labor.
6. The duration is populated based upon the start and end time.
Optionally, you can enter any two values and the third value will be displayed automatically.
7. Choose a Service Date from the date list of values.
The system date is defaulted.
8. Optionally choose a Reason for recording the labor line from the list of values.
9. The Channel Code field is populated automatically. It shows whether the resource that created the debrief is a connected user or a disconnected user. A disconnected user created the debrief from a mobile device.
10. Click Save.
The labor line is saved.

Guidelines

Please refer to Updating the Task Assignment Status, page 3-13 for more details.

You can create multiple labor lines before saving and updating. When you have performed an update you can't modify the labor lines that have been successfully updated. You can however still add new labor transaction lines and update them. However, Field Service Debrief does not allow you to add new lines in cases where the task assignment status has been closed.

Recording Counter Readings

Optionally, you can record counter readings. Counter readings can only be recorded for customer products defined in the installed base which have a counter assigned to them. When the button is grayed out, no counter readings are associated with the product.

With Service Requests created against a product that has a counter associated with it, upon completion of the task assignment, debrief will generate an alert reminder to the technician that the product has a counter. Debrief generates this alert when a task assignment is changed to either "completed" or "closed."

In the case where a single task has been assigned to multiple resources, the alert message is displayed as long as the counters have not been updated between the scheduled start time and the system time by any one of the assigned resources.

Use this procedure to capture counter readings.

Prerequisites

The installed base item against which a service request has been created must have a counter group setup and counters associated with it.

Responsibility

Field Service Manager

Field Service Representative
Field Service Dispatcher

Navigation

Field Service Manager: Field Service Dispatcher > Debrief > Find Tasks > Debrief
Field Service Representative: My Tasks
Field Service Dispatcher > Debrief > Find Tasks > Debrief

Steps

1. From the Debrief window, click Counters.
The Counters window is opened.
2. Select the counter within the counter group of your choice and double-click it. The Capture Counter Reading window opens.
3. Enter a value for the counter reading.
4. Click OK.
The value is saved.

Viewing Onhand Quantity

You can view the on-hand quantity for items within a selected inventory organization.

Prerequisites

Oracle Inventory is implemented.

Responsibility

Field Service Manager
Field Service Representative
Field Service Dispatcher

Navigation

Field Service Manager: Field Service Dispatcher > Debrief > Find Tasks > Debrief
Field Service Representative: My Tasks
Field Service Dispatcher > Debrief > Find Tasks > Debrief

Steps

1. From the Tools menu in the Debrief window, click View Onhand Quantity.
2. Pick the organization from the LOV for which you want to view onhand quantity.
The Find On-hand Quantities window is opened.
3. Enter the criteria that you want to use to limit the results of your search and click Find.

The Item On-hand Quantities window is opened and a list of items that match your search criteria with on-hand quantity is displayed.

4. Click on the Sub Inventories button on the onhand quantity form to view sub inventories for the specified organization.

Viewing Parts Requirement

Use this procedure to view and create parts requirement for a specified task.

Prerequisites

You must first create a task.

Steps

1. From the Tools menu in the Debrief window, click Parts Requirement.
The Parts Requirement window opens with the service request, task and the resource information populated in the header region.
2. The details region is populated in case there are any parts associated with the task.
3. Optionally the user can also create new Parts Requirement from this window.

Viewing Service Request

Use this procedure to view service request details for a specified task.

Prerequisites

None.

Responsibility

Field Service Manager
Field Service Representative
Field Service Dispatcher

Navigation

Field Service Manager: Field Service Dispatcher > Debrief > Find Tasks > Debrief
Field Service Representative: My Tasks
Field Service Dispatcher > Debrief > Find Tasks > Debrief

Steps

1. From the Tools menu in the Debrief window, click Service Request.
The Service Request window is opened with the service request and task details populated.
2. You have the ability to create an additional task from the service request window.
3. Optionally, you can also navigate to charges to submit the charges for debrief.

Updating the Task Assignment Status

Use this procedure to update the assignment status and push information to inventory, installed base, and charges.

Prerequisites

A service request and task to report on. Status transition engine must be setup for tasks.

Responsibility

Field Service Manager

Field Service Representative

Field Service Dispatcher

Navigation

Field Service Manager: Field Service Dispatcher > Debrief > Find Tasks > Debrief

Field Service Representative: My Tasks

Field Service Dispatcher > Debrief > Find Tasks > Debrief

Steps

1. From the Debrief window, in the Assignment Status field, select the new task status from the list of values.

2. Click Save.

A concurrent program "CSF: Update Debrief Lines" is enabled. The concurrent program will push information to inventory, installed base and charges only if the task status has one of the following flags enabled in the tasks status setup form:

- Completed
- Closed
- Cancelled
- On Hold
- Rejected

3. Optionally, you can run this program manually by specifying the debrief number.

4. Depending on the status of the concurrent program, the debrief status on the debrief window is populated.

The debrief status can have the following values:

- Complete - indicates the debrief lines have been pushed to inventory, installed base and charges successfully.
- Running - indicates the concurrent program is still running
- Pending - indicates the concurrent program is still running
- Completed with errors - the concurrent program completed with error. The details error information can be viewed in the error column on debrief lines

5. Verify by logging into inventory, installed base and charges to view the processed information.

Guidelines

If there are multiple task assignments related to a task, then all task assignments must be closed in order for the task to be closed. This occurs when multiple field service representatives are assigned to the same task.

With Service Requests created against a product that has a counter associated with it, upon completion of the task assignment, debrief will generate an alert reminder to the technician that the product has a counter. Debrief generates this alert when a task assignment is changed to "completed" or "closed."

Viewing a Pro Forma Invoice

Prior to sending an invoice to a customer after a debrief is completed, you can review a summarized view of the invoice by using the Field Service Pro Forma Invoice feature.

This report details the charges for the service performed at the customer site and includes such information as customer name, contract number, service request number, item, quantity, amount, and currency.

Use the following procedure to view a Pro Forma Invoice.

Prerequisites

A task must be completed.

Responsibility

Field Service Manager

Field Service Representative

Field Service Dispatcher

Navigation

Field Service Manager: Field Service Dispatcher > Debrief > Find Tasks > Debrief

Field Service Representative: My Tasks

Field Service Dispatcher > Debrief > Find Tasks > Debrief

Steps

1. From the Tools menu in the Debrief window, select Pro Forma Invoice.
The Pro Forma Invoice window opens.
2. View the details of your invoice, which includes the service activity, item and contract numbers, unit price, list price, quantity and charge amount.
3. After review, if you are satisfied with the invoice close the form and return to the Debrief window.

Part 2

Spares Management

Using Spares Logistics

This chapter covers the following topics:

- Spares Logistics Summary
- Create Parts Requirement
- Create an Internal Order or a Parts Reservation
- Use Parts Search Hierarchy
- Order Parts Using Move Orders
- View Parts Order Status
- Execute Routine Replenishment
- Return Excess Parts

Spares Logistics Summary

Sections in this chapter include:

- Create Parts Requirement, page 4- 1
- Create an Internal Order or a Parts Reservation, page 4- 4
- Use Parts Search Hierarchy, page 4- 6
- Order Parts Using Move Orders, page 4- 8
- View Parts Order Status, *ERROR: linkend not in current document and TARGET_BOOK_TITLE missing*
- Execute Routine Replenishment, page 4-17
- Return Excess Parts, page 4-18

Create Parts Requirement

Required

A parts requirement defines specific parts needed for a product and task. If you are using Advanced Scheduler functionality from the Oracle Field Service suite, the Parts Requirement is used to automate the process of assigning and scheduling tasks to a technician, based on both parts and technician availability.

You can create the parts requirement manually. For example, a field technician might be assigned a task to fix a broken copy machine. Once he arrived at the customer

site, however, he found that he didn't have some of the required parts in stock. The technician can call into the Dispatch Center and request the needed parts. The dispatcher or field manager then creates a parts requirement and, subsequently, may use the Parts Requirement to create an Internal Order. See [Create an Internal Order](#), page 4-4 or a [Parts Reservation](#) for details.

The Parts Requirement can also be created automatically when the service request and task are created as long as the parts required for a task template and product have been predefined in Spares Management.

You can also access the Parts Search Hierarchy UI directly from the Parts Requirement UI by clicking the Parts Search button. This functionality enables the dispatcher to quickly locate parts in a scenario when ATP functionality is not finding availability in the normal supply chain.

There are two methods to create a Parts Requirement outlined in this section:

- [Create Parts Requirement Manually](#), page 4-2
- [Create Parts Requirement Automatically](#), page 4-4

Create Parts Requirement Manually

You can create a Parts Requirement manually, by accessing the UI directly and entering the appropriate information. The Parts Requirement UI is divided into four parts:

- **Header Information** (Service Request number, resource name, requirement number, etc.)
- **Ship To Address:** This block can be populated with one of the field technician's ship to addresses, one of the customer addresses, or a special address, which is entered at the time the Parts Requirement is created.
- **Items to be added to the Parts Requirement:** There can be multiple items associated to a particular Parts Requirement.
- If you do not know the Item number, you can enter a "dummy" part number (which needs to be set up in Oracle Inventory), and then enter an item description in the Item Scratchpad field. This information can be used to research the item to find the item number in the Item Master. Once you find it, substitute the actual item number for the place holder number.

Prerequisites

Parts must be defined for the task.

ATP must be setup.

Addresses and subinventories must be defined for the resource.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Parts Requirement

Steps

Follow these steps to **manually** create a Parts Requirement:

1. Open the View Parts Order Status form.
To search for existing Part Requirements, use this form as a Find function. If you have to modify an existing Parts Requirement, you can search for it here.
2. To create a new Parts Requirement, click the New button.
The Parts Requirement window opens.
3. If you are creating the Parts Requirement for a specific service request or task, enter the service request number. (If you know the Task number, enter it and the Service Request number attached to the Task is automatically entered.)
Resource type and name will automatically be entered if a resource has been assigned to the task. The destination organization, subinventory and address will automatically be entered if they have been set up for the resource.
4. If not already populated, enter the Resource Type and Resource Name that you want to associate with the Parts Requirement.
You can only enter these fields if a Service Request and Task is not associated with the Parts Requirement. You can leave these fields blank if you are using the Scheduler integration functionality. This will be done automatically through scheduler.
5. Select an organization from the Destination Organization list of values.
This is the organization that contains the location to which the item will be shipped. If the Resource Name (i.e. the field technician) is associated with a subinventory, this field will be populated with the organization associated with the subinventory. The Destination Subinventory field is also populated.
6. Enter a date in the Need By date field.
7. The Order Type field can be selected from the list of values, although it defaults to the order type defined in the "CSP: Order Type" profile option.
8. In the Ship To block, select the radio button of the address you want to ship the parts to, either Engineer, Customer, or Special.
The default selection is Engineer and the engineer's default address is displayed. If you want to change addresses, click the Addresses button and choose the address where you want to ship the parts.
If you choose the Special radio button, enter the address and click Save. This address will be added to the engineer's list of addresses.
9. In the Required Item field of the Requirement tab, choose the item number of the part you want to assign to this Parts Requirement from the list of values.
10. In the Required Quantity field, enter the quantity needed to fill the Parts Requirement.
11. Repeat steps 9-10 for each item you want to add to the Parts Requirement.
12. Optionally, navigate to the Order tab to view order details such as Supplied Item, Source Type, and Document Number.
13. Click Save to create a Parts Requirement.
This will create a Requirement Number, which you can use to access the Parts Requirement at a later time if you need to view or modify it.

Guidelines.

To set up a Parts Requirement, the minimum required is a Destination Organization and an item. If you are creating a Parts Requirement for scheduler integration, you do not need to enter a Resource Type or Resource Name. These values are assigned by scheduler at a later time, based upon parts and technician availability.

Create Parts Requirement Automatically

In many field service operations, field technicians have certain maintenance tasks that they execute frequently and the parts required are well defined.

You can create a Parts Requirement automatically when you create a service request for a product using a Task Template where parts have been pre-defined in Spares Management for the product and template. See the Task Template and Task Parts setup sections in the *Oracle Field Service Implementation Guide* for details.

Prerequisites

Task Parts definition must be created. Sub-inventories must be defined and assigned to specific organizations.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Service Request > Service Requests > Create Service Request

Guidelines

When you create a service request, you must associate a task to it using the task template functionality. After you have created a basic service request, navigate to the Task tab, and click the Use Template button to create a task based on a template.

In the Create Tasks from Template Group window, choose the Template Group that corresponds to the task template you want to use. You define items associated with products and a task template during Spares Management implementation.

For more information on creating a service request and creating tasks from a task template, see the *Oracle Support User Guide*.

Create an Internal Order or a Parts Reservation

Once you create a Parts Requirement, you can manually create an internal order or create a reservation on a technician's trunk stock.

An internal order to fill a parts requirement allows you to ship the necessary parts to a field technician at the specified "ship to" address. You can check for part availability within the supply chain. If you set the "CSP: Include Alternates" profile option to Always, your Availability search will automatically include alternate parts. These alternates include both substitute and supersession parts. Other values for the profile option include: Never, Parts Requirement only, or Scheduler Only.

Internal orders are tracked using the Internal Order Number, which is created for each item of the Parts Requirement that is part of the order. Internal Orders allow you to ship parts between two organizations.

If a technician has the parts available in his trunk stock, you can also use the Availability feature to create a reservation for the parts, which automatically allocates them to the specific task that requires the parts. This ensures that the same parts aren't assigned to separate tasks.

Although often times you will create an internal order or reservation at the same time that you create the Parts Requirement, this is not required. You can create an internal order at any time after a Parts Requirement has been created. For details on creating a Parts Requirement, see Create Parts Requirement, page 4- 1 .

Prerequisites

None.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Parts Requirement

Steps

The following steps will guide you through the creation of an internal order or a reservation:

1. From the Parts Requirement page, query the Parts Requirement for which you want to create an internal order.

If you know the Requirement Number, query using that number, which will populate the Parts Requirement window with the relevant information. Otherwise, use the View Parts Order Status Find function to search for a requirement. If a Parts Requirement does not already exist, you can create it at the same time as you create the Internal Order.

2. If the part does not already have a value, enter the Required Quantity for the part.
3. If there are multiple items that you want to ship together on the same internal order, enter the identical number for each item in the Ship Set field.

For example, if you have two items entered and you want both items to ship together enter "1" for the Ship Set. If you have four items and you want items one and two to ship together and items three and four to ship together, enter ship set of "1" for items one and two and a Ship Set of "2" for items three and four.

4. If you want to manually choose the sourcing for the part (optional), click the Source tab.
5. Enter the Source Organization and Source Subinventory.
6. Save your work.
7. At this point, you can click Create Order to create an Internal Order.

You can view this internal order or reservation by clicking the Source tab.

8. Optionally, if you want to view sourcing options for creating the order or reservation, click the Availability button.

If the quantity ordered for the part is available (or a suitable substitute or superseded part), the following fields automatically populate using ATP functionality:

- Item Required, Required Quantity, Item Supplied, Available Quantity Source Type, Source, Order Quantity, Shipping Method, Arrival Date.

If multiple options are available, the Availability window displays all of them. In this way, all alternate parts and the availability of the parts, as defined by the sourcing rule used by ATP, are displayed.

If the technician has parts available in the trunk stock, the Source Type reads Reservation. If the parts are available in a warehouse, the Source Type reads Internal Order. The options available for Source Type depend upon the configuration of the supply chain.

9. To create an order or a reservation, choose the Select checkbox next to the option that you want to use.
10. Click Order.

Once the order or reservation is create, the main Parts Requirement window populates with the appropriate information. You can cancel an order by navigating to the Order tab and selecting the Cancel checkbox. You must also enter a Cancel Reason.

You can view this internal order or reservation by clicking the Source tab.

When an order is successfully created, the order status is set to "Booked," and the Document Number field will be populated with the internal order number used in Order Management.

Use Parts Search Hierarchy

Optional

Spares Management uses the Parts Search Hierarchy to locate parts for field technicians. This functionality can be used in the Parts Requirement UI to search beyond the normal supply chain when the Availability button does not find a source.

Parts Search Hierarchy uses a sophisticated Find functionality that not only finds all the organizations and subinventories that have the parts you need, but also narrows the search to display only those organizations and subinventories that have the necessary quantity on hand that you need to complete the task. By using the "expression" and "condition" functionality, you can narrow your search to only those subinventories that meet your specified criteria.

For example, a technician needs to fill a parts requirement for a particular item and needs a quantity of 15. In the Find function, you can include the part number with an expression of "usable on hand" and a condition of "more than" and an expression of "14." With this expression, your search results will display only those organizations and/or subinventories with at least 15 of your required part on hand.

With any search, the Parts Search Hierarchy's tree structure collapses to display only those organizations and subinventories that meet your search requirement. You can also search by location to see all parts that are in the requested location. You can view parts information at the organization, subinventory, or the node level. With the Display Alternate Items feature in the Find Items window, you can include substitutes and supersessions in the results.

Prerequisites

The tree functionality must be set up in the Planner's Desktop and the concurrent program to create part availability data must be run. The tree can only be updated in the Planner's Desktop.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Part Search Hierarchy

Steps

Follow these steps to search for a location that contains a sufficient quantity of a part so that you can process an internal order for the part:

1. Click the hierarchy node, organization, or subinventory from which you want to search for the part.
2. To search for a specific part from the top level of the hierarchy, click the flashlight in the tool bar.

The Find Items window opens.

3. Enter a part number in the Item field.

You can select the Display Alternate Items check box include substitutes and supersessions in the results. You can also use a conditional expression to narrow the search results.

4. Click Find.

The Parts Status tab displays status for the nodes that contain the part for which you searched.

The Drill Down tab displays the details of the warehouses and the subinventories beneath the node in which you searched. This displays such information as Node Name, Item, Usable Onhand, Excess, and so on.

5. Click node names to see the subinventories or organizations that contain the part for which you searched.
6. Click a subinventory, warehouse, or node name to see the on hand and order status for this part.

On the spread table, the On hand column shows the quantity as of the last time the Create Part Availability Data program was run. The updated values are displayed at the bottom of the window. The On Hand quantity includes reserved quantities. The Available quantity does not include reserved quantities.

7. If you want to create an Internal Order from this window, click Order Part.

The Order Part button is enabled only when you are in a subinventory or a warehouse.

Click the Order Part button to bring up the Parts Requirement window.

Note: You can navigate to a specific node or subinventory first before you search for a part.

Guidelines

You can display selected nodes and subinventories in the navigator tree. A red X in front of a subinventory indicates a defective subinventory. A green checkmark in front of a subinventory indicates a usable subinventory.

When using the Find function, you can display all available parts, including alternates, by selecting the Display Alternate Items checkbox when you conduct your search.

You can access the Parts Search Hierarchy UI directly from the Parts Requirement UI by clicking the Parts Search button. This functionality enables the dispatcher to quickly locate parts in a scenario when ATP functionality is not finding availability in the normal supply chain.

Order Parts Using Move Orders

Simple move orders for parts within a single inventory organization can be processed using the Move Order process that is located under Move Orders in the Navigator. Field service representatives, as well as dispatchers and managers, can process Move Orders.

This section on Move Orders includes the following topics:

Create Move Orders, page 4-8

Create Reservations, page 4-10

Print Picklists, page 4-11

Confirm Picklists, page 4-12

Create Packlists, page 4-13

Receive Shipments, page 4-15

View the Status of Move Orders, page 4-16

Create Move Orders

Move Orders are used to transfer parts between subinventories within the same inventory organization. The following features are available when creating a move order:

- You can ship parts on a Move Order to a one-time address, if needed.
- You can override the automatic receipt setting at the Move Order level. Automatic receipt is typically set at the subinventory level.
- You can change the source subinventory after the Move Order is approved.
- You can reference a service request and task number.

Prerequisites

A move order can move parts only between subinventories within one inventory organization.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Spares Move Order
> Create Move Orders

Steps

1. If the Select Organizations window appears, select an inventory organization that you want to access.
This opens up the Move Orders window for the specified inventory organization.
2. Optionally, enter the Source Subinventory and Destination Subinventory in the Default section of the Move Order window if you want this information to default to your move order lines.
This default feature is useful when you are entering multiple lines with the same source and destination subinventories.
3. Enter the part number in the Item field.
Note: If you entered the Move Order window from Parts Search Hierarchy, the part number defaults into the Item field.

When you choose an item, the Unit of Measure (UOM) field and the Date Required fields automatically populate with default values.
4. You can change the Date Required value by using the list of values or by entering a new date.
5. Enter the move order quantity in the Quantity field.
6. Click on the Source tab and enter or select a source subinventory from the list of values.
If you entered the Move Order window from Parts Search Hierarchy, the Source Subinventory defaults.
7. Optionally, enter Locator, Lot Number, Serial From and Serial To, if your part is using these features from Oracle Inventory.
8. In the Destination tab, select a destination subinventory from the list of values.
Note: The Project and Task tab and the Control tab are not used for Spares Management.
9. In the Service Controls tab, optionally select the Service Request and Task numbers from the list of values.
10. Optionally, enter the Customer PO and Comments.
11. If you want to override the automatic receipt setting for this move order, click the Special Ship To button. Check or uncheck the Auto Receipt check box. The default value comes from the destination subinventory. The automatic receipt feature is used when the shipment needs to be automatically transacted into the destination subinventory at the Confirm Ship step. Automatic receipt is often used along with a special ship to address when a drop shipment is required.
12. If you want to ship the parts to a one time address, click the Special Ship To button.

The Special Ship to address is used when the Move Order needs to ship to an address other than the standard address assigned to the destination subinventory. You can enter a special address or click the Address button and select from a list of addresses previously entered for customers or locations.

13. Optionally, select the Shipment Method and Carrier from the list of values.
14. Click OK to close the window.
15. Save your work.

The Move Order number is displayed.

16. Click Approve to change the status of the Move Order to Approved.

The Move Order must be in an Approved status for further processing to continue. If you click Approve before saving your move order, the save and the approval both occur.

Guidelines

You can update existing move orders by navigating to the Create Move Orders window and querying the move order number you want to update. You can also find your move order on the View Move Order Status window.

If your move order is not approved, you can update any field in the move order. If your move order is approved, you can update any field except Quantity and Destination Subinventory. Once you complete your changes, save your work.

Create Reservations

Optional

Allocations are used to reserve parts in a specific subinventory location for a move order. The allocation is the link between the Move Order and inventory. This functionality is typically used to ensure that the Move Order which has been generated to support a service request task will be shipped as a priority if inventories are limited.

This process is optional because the Create Picklists process allocates the inventory automatically. When creating manual allocations, you can:

- View On-hand and Available quantities.
- Allocate the inventory with two mouse clicks if you do not need to view the quantities.

Prerequisite

The Move Order must be in an Approved status to create an allocation.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Spares Move Order > Reservations

Steps

Follow these steps to view inventory quantities and then create a manual allocation for a move order.

1. Navigate to the Create Allocations window.
2. If the Select Organizations window appears, select an inventory organization.
The Find Move Order Lines window opens.
3. Enter the Move Order number in the Number field of the Headers tab.
4. Click Find to open the Create Allocations window for the inventory organization that you choose in step 2.
5. Mark the Select checkbox to the left of the Move Order Line.
6. Click Allocations.
7. Click View/Update Allocations to open the Transact Move Order Line Allocations window.
8. Scroll right and enter a quantity in the Quantity field.
9. Click Update.

Note: Steps 7-9 are only required when you need to change the quantity of an allocation.

10. Optionally, click View/Update Details again to verify the allocated quantity.
The allocation was created successfully if the Allocated Quantity field displays the allocated quantity.

Print Picklists

Optional

Picklists are used to produce a report that specifies the parts to be picked from their location in the warehouses and shipped. Printing the picklist changes the Move Order status to Printed.

Furthermore, if an allocation was not previously created, printing the Picklist creates the allocation automatically. You can print a picklist for an individual move order or you can print a picklist for a batch of move orders.

Prerequisites

The Move Order must be in an Approved status. The quantity on hand must be greater than or equal to the quantity ordered on the Move Order.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Spares Move Order > Print Picklists

Steps

Use this procedure to print picklists:

1. If the Select Organizations window appears, select an inventory organization.
The Submit Requests window opens.
2. To print a picklist for an individual Move Order, enter a Move Order number and click OK.
3. To print picklists for a batch of Move Orders, enter appropriate values in one or more of these parameters: Source Subinventory, Destination Subinventory, Date Required and Requestor. Click OK.
4. Click Submit to run the concurrent program that creates the picklist.
5. Click No in the Decision window if you are finished printing picklists.
6. Optionally, verify that the picklist was created by navigating to the Move Order Status window.
7. Enter your move order number in the Find window and click Find. The line status should indicate Printed and the Picklist number should be assigned to the Move Order and the picked quantity should display the correct quantity.

Confirm Picklists

You must confirm Picklists so that the correct quantity actually picked is verified before packing and shipping the parts. You must confirm the Picklist so that the Picklist will be available for inclusion on the Packlist. Confirming the Picklist changes the Move Order line status to Confirmed.

With this feature, you can change the picked quantity during the confirmation step if it is different than the picklist. You also can split picklist lines into multiple lines for shipping.

Prerequisites

The Picklist must be in Printed status before it can be confirmed.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Spares Move Order > Confirm Picklists

Steps

Follow this procedure to confirm a picklist:

1. If the Select Organizations window appears, select an inventory organization
The Find Picklists window opens.
2. Enter a picklist number or select from the list of values and click Find.
The Confirm Picklist window opens and is populated with data from the selected picklist.
3. Click Confirm Pick to confirm the Picklist.

4. You can optionally verify that the picklist was confirmed by navigating to the View Move Order Status window.
5. Enter your move order number or your picklist number in the Find window and click Find.

The line status should indicate Confirmed and the picked quantity should display the correct quantity.

Create Packlists

Optional

A packlist is used to define the contents of a box and to execute the physical shipment. Picklists are assigned to boxes and packlists are created for each box. Packlists must be printed and then confirmed.

The confirmation process transacts inventory out of the source subinventory, relieves the allocated quantity and transacts inventory into the destination subinventory if the auto receipt feature is enabled. If auto receipt is disabled, the shipment is transacted into the in-transit subinventory. With this functionality you can:

- Find consolidation opportunities by viewing all pick lines destined for the same ship to address.
- Assign multiple pick lines to one box.
- Split pick lines into multiple boxes.
- The ship to address from the Picklist is automatically assigned to the packlist header.
- You can print the packlist and confirm the shipment from the same window.

Prerequisite

The Picklist must be in a Confirmed status to be available for selection in a packlist.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Spares Move Order > Packlists

Steps

Follow this procedure to confirm a packlist:

1. If the Select Organizations window appears, select an inventory organization.
The Packing Lists navigator tree appears.
2. Click the "+" sign in front of Packing Lists node. The Packing Lists folder expands to display the Open, Received and Shipped status folders.
3. Click the "+" sign in front of the Open folder to display open packing lists.
4. Click the Open folder and then right-click it.
A pop-up menu appears.

5. Select Create Packing List.
The Create Packlist window appears with the Packlist Details tab displayed.
6. Optionally, enter shipping information including Carrier, Shipment Method, Waybill, Comments, Ship to Subinventory and Location Address.
Note: You can also enter this information later when you are finalizing your packlist.
7. Save your work to create the Packlist.
Your packlist appears under the Open folder.
8. Click the "+" sign in front of your packlist to display Box 001.
9. Click Box 001 to open the Box Details tab.
You can enter the weight here.
10. Open the Picked Items tab.
The Find Picklists window opens.
11. Enter the picklist number and click Find, or leave the picklist number blank and click Find to execute a blind query for all picklists that have not been previously assigned to a packlist.
12. Select from the spreadtable the picklist item to be added to the box.
You can select multiple items, if required.
13. Click Add to assign the selected lines to the box.
The selected pick line disappears from the Picked Items tab and is transferred to the selected box. All other pick lines that are assigned to a ship to address that differs from the pick line just selected, disappear from the Picked Items tab.
14. To add more pick lines to the same box, repeat steps 10 through 13.
15. To add a second box to your packlist, click your packlist folder and then right-click it.
A pop-up menu appears.
16. Select Create Box, optionally enter the weight in the Box Details tab and click Save.
Your new box number appears under your packlist.
17. To split the quantity on a pick line into more than one box, click the quantity value of a pick line in the Picked Items tab.
The Split Quantity window opens.
18. Enter the quantity to be assigned to the first box and click OK.
19. To add the remaining quantity to another box, click on the other box number.
20. Click the picklist number containing the remaining quantity and click Add.
21. To finalize the packlist, click the packlist number.
22. Enter values for carrier, shipment method, waybill and comments in the Pack List Header tab if you did not previously enter these values.
23. Save your work

24. Enter the box weight in the Box Details tab if you did previously do so.
25. Save your work to create the packlist.
26. Click Print in the Pack List Header tab to the print the Packlist.
The Submit Request window opens.
27. Click Submit to print the Packlist and click No in the Decision window.
28. Click Ship Confirm in the Pack List Header tab to confirm the shipment.

Receive Shipments

Optional

Receiving parts is executed automatically if the auto receipt flag is enabled. If the auto receipt flag is disabled, use the Receive Parts window to receive parts manually. Receiving is performed at the packing list level. The receipt transaction relieves the in-transit subinventory and increments the destination subinventory.

With this process, you can:

- Correct the quantity received if it differs from the quantity shipped.
- Or, if the quantity received is correct, you can receive the entire shipment with one mouse click.
- Close the receipt with a short quantity, in the case of lost parts, for example.

Prerequisite

The Packlist must be in a Shipped status for receiving.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Spares Move Order > Receive Shipments

Steps

Follow this procedure to manually record a receipt of parts:

1. Navigate to the Receive Shipments window. The Find Packlists pop-up window opens.
2. Enter a Packlist and click Find or leave the Packlist field blank and click Find to execute a blind query.
The Receive Parts window opens with a list of shipments that match your search criteria.
3. If the quantity shipped is the same as the quantity received, select all the lines and click Receive.
4. If the quantity shipped is different from the quantity received, click the quantity value under the This Receipt column.
5. Enter the actual quantity received and click Receive.

6. Optionally, close the partially received line by selecting the line and clicking Close Line. To activate the Close Line button, you must set up an inventory account alias, named CSP_RECEIPT, in the relevant organization.

For information about setting up the account alias, refer to the *Oracle Field Service Implementation Guide* section on setting up inventory organizations.

View the Status of Move Orders

The View Move Order Status window allows you to view the move order status and details at every step in the logistics process.

This window also allows you to:

- Track Move Order quantities throughout the logistics process.
- View the date and time of each step of the logistics process.
- View details such as picklist number, packlist number, carrier and waybill number.
- Navigate directly to the Move Order window by clicking on the move order number.
- View multiple move orders by using combinations of the parameters in the Find window, including Move Order number, Source Subinventory, Destination Subinventory, Picklist number, Packlist number, Waybill number and Line Status.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Spares Move Order > Move Order Status

Steps

Follow this procedure to view the status of one or more move orders:

1. Navigate to the View Move Order Status window.
The Find window opens.
2. Enter the criteria that you want to use to limit the results of your search in the Find window and click Find.
A list of move orders that match your search criteria is displayed.
3. Scroll to the right to view all details for move orders.
4. Optionally, click on a move order number to navigate to the Move Order window.

View Parts Order Status

The View Parts Order Status window allows the viewing of parts requirements and internal order details at every step in the logistics process.

This window enables you to:

- Track Internal Order quantities throughout the logistics process.
- View the date and time of each step of the logistics process.

- View key logistic details such as carrier and waybill number.
- Navigate directly to the Parts Requirement window by clicking on the Requirement number hyperlink.
- View multiple internal orders by using combinations of the parameters in the Find window, including Order number, Source Organization, Status, Item Number, Order By Date, Promise Date, Service Request, Need by Date, Resource, Task, Requirement, Waybill number and Line Status.
- Check whether or not an internal order has been created for the Parts Requirement.
- View whether or not a service request and task have been assigned to the Parts Requirement.

Prerequisites

You must have created a Parts Requirement and/or an Internal Order.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Spares Logistics > Parts Order Status

Steps

Follow this procedure to view the status of one or more Parts Requirements and/or internal orders:

1. Once you navigate to Parts Order Status, the View Parts Order Status window opens.
2. Enter the criteria that you want to use to limit the results of your search in the Find window and click Find.

A list of parts requirements that match your search criteria is displayed.

3. Scroll to the right to view all details of the Parts Requirement.
4. To view a specific Parts Requirement, either select the Parts Requirement and click OK, or click the Requirement Number hyperlink.

The Parts Requirement window opens. See Create Parts Requirement, page 4- 1 for details.

Execute Routine Replenishment

Technicians and field service warehouses need to be periodically replenished with parts used by the technician or shipped by the warehouse. Replenishment for field technicians and warehouses is accomplished by running the Oracle Inventory Min - Max Planning Report concurrent program.

The program can be run in two modes: automated or manual. The automated mode will automatically create the internal order, move order, or purchase requisition, depending upon the sourcing used. The manual mode provides a report that can be reviewed by the planner before the orders or requisitions are created.

Parts replenishment is done at either the organization or subinventory level.

Note: You can launch this report from the Planning tree by territory or field service manager or any other logical grouping that is defined by a node in the tree by right-clicking on the desired node and selecting the Create Min-Max Planning Report concurrent program.

Prerequisites

Authorized Stock Lists must be defined.

Responsibility

Inventory

Navigation

Dispatch Center > Spares Management > Spares Logistics > Reports and Programs > Create Min-Max Report

(Alternatively) Planner's Desktop > Right-click node or subinventory you want to replenish

Steps

1. When you select the Min-Max Planning Report concurrent program, the Parameters window opens.
2. Select Subinventory or Organization in the Planning Level field.
3. If you chose Subinventory, select the Subinventory in the Subinventory field from the list of values.
4. Select Yes in the Restock field if you want to run in the automated mode. Select No if you want to run in manual mode.
5. Review other parameters and change from the default values as required.
For more information regarding these fields, see the *Oracle Inventory User's Guide*.
6. Click OK in the Parameters window.
7. Click Submit in the Min-Max Planning window to submit the request.
8. When you are asked if you want to submit another request, click No in the Decision window to close the main Min-Max Planning concurrent program window and return to the Tools menu.
9. To check the status of your concurrent request, select View from the Tools menu and select Requests.
10. Click Find to view all of your concurrent requests.
11. To view the output of the Min - Max Planning Report, select this request and click View.

Return Excess Parts

Spares Management provides a process for managing the return of excess parts from either field technicians or warehouses.

You can define business rules so you can focus only on the excess parts that have the highest cost impact. Excess parts are defined as those parts whose available inventory

balance is greater than the maximum level defined in the ASL. If the maximum level is null, a zero quantity is assumed. Internal orders, or inter-organization transfers for excess parts, are created when the return of excess parts is approved.

There are three steps to the process of returning excess parts, two of which are required and one is optional. These are:

- Run the Create Excess List Concurrent Program (Required)
- Run the Print Excess List Concurrent Program (Optional)
- Return Excess Parts (Required)

Run the Create Excess List Concurrent Program (Required)

You can create excess lists for both usable and defective parts. Run the Create Excess List concurrent program to identify the excess parts and to apply your excess rules to filter for high impact excess parts.

Note: You should run the Create Excess List Concurrent Program just prior to initiating the return excess parts process to ensure that the latest updates are included in the excess parts data.

You can create excess part lists at any node level on the planning tree, depending upon whether you are managing lists for field technicians or warehouses. You make this choice when you run the Create Excess Lists concurrent program when the program prompts you to enter parameters.

The Planning Node field displays a list of values that mirrors your organization structure as built on the Planning Tree in the Planner's Desktop. You can choose to run excess lists at the node, warehouse or technician level. All other parameters available when you run the Create Excess List request are optional and contain default values.

Excess lists rely on Excess Rules, which you define during implementation. Excess rules allow you to create lists based upon "real world" considerations. For example, you may not want to return excess parts if the on-hand stock maximum is set at 50 and the field technician has 51 on hand. You define excess rules to handle this type of situation. See the *Oracle Field Service Implementation Guide* for more information.

Excess Rules apply only to the determination of excess in a usable subinventory or warehouse. For a defective subinventory, all parts are considered excess.

Run the Print Excess List Concurrent Program (Optional)

You can also run a concurrent program to print excess lists, which can be used by the field technician to review the excess list before execution.

Return Excess Parts (Required)

You can use the Return Excess window to view and approve excess parts for return.

You can search for Excess Lists by specific Organization, field technician, subinventory, or item. Once you retrieve an excess list, after reviewing it, Spares Management allows you to move it to Return Lists table where you can then create an inter-org transfer or internal order to return the parts.

You can return all of the excess parts, or only part of the excess by manually entering the Current Return Quantity number before ordering the parts return. This will move the excess parts into the Return Lists box.

The bottom region of the window is called Return Lists and displays excess lines that have been approved for return.

Prerequisites

You have to run the Create Excess List concurrent program (steps below).

Excess Rules are recommended, but not required.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Reports and Programs (Use this path to run the concurrent programs)

Field Service Dispatcher > Spares Management > Spares Logistics > Excess Returns

Steps

To Return Excess Parts, follow these steps.

1. First, from either the Planning Tree or the Navigator, run the Create Excess Lists concurrent program.

In the Parameters window, select the node, warehouse, or technician for which you want to create an excess list. For all other parameters, review and change from default as required.
2. Click OK to save your entries and close the Parameters window.
3. Click Submit to submit the request for this concurrent program.
4. Optionally, you can next run the Print Excess List concurrent program.

Use the same navigation path as above, and choose the Print Excess Lists concurrent program.
5. Choose the Organization ID for the Excess List you want to print from the list of values.
6. Choose the Subinventory for the Excess List from the list of values.
7. Click OK to close the Parameters window and return to the Submit Request window.
8. Click Submit to run the concurrent program.
9. Finally, initiate the Excess Return process by navigating to the Excess Lists window.
10. From the Excess Lists window, use the Find function to display the excess lists you want to access.

You can search for excess lists by entering values in any of the following fields: Resource Type, Resource Name, Organization, Subinventory, or Item.
11. If you want to include Defective or Usable parts in the search, select the appropriate checkbox.

To search for all excess lists, select both checkboxes for Defective and Usable parts.
12. Click Find.

The excess lists that fit your search criteria are displayed in the Excess Lists box. Each excess list displays identifying information such as, Item Number, Current Excess Quantity, Organization Name, Subinventory Code, Condition Type, etc. The excess quantity number is the quantity that is in excess of the maximum quantity as defined in the ASL after applying the excess rules. The number in the current excess quantity is a hyperlink, which you can use to alter the number of items you want to return.

13. To change the return quantity, click the hyperlinked Current Excess Quantity number.

The Return Quantity window appears with the value of the Current Excess Quantity displayed in the Return Quantity field.

14. Change the value in the Return Quantity field to the number you want to return.
15. Click OK.

The Excess List is automatically moved to the Return Lists box and the value you just entered is displayed in the Current Return Quantity field.

16. Alternatively, if you do not want to change the Current Excess Quantity number, you can move the excess list to the Return Lists box by selecting it and clicking the Add button.

When you approve an excess line and move it to the Excess Return box, the Status field changes to Modified.

17. To reject an excess list, select the list and click the Reject button.

This changes the Excess Status to Rejected.

18. If you want to move a list from the Return Lists box, back into the Excess Lists box, highlight the list and click the Remove button.

19. Once you have approved an Excess List for return, highlight the list and click the Return button.

The Return Item window opens. This window displays the Source Organization and Source Resource information for this excess list.

20. For a resource, the Return Organization and Return Subinventory fields contain default values if the resource has a Return To organization and subinventory defined. Otherwise, for a warehouse, select an organization from the Return Organization and Return Subinventory lists of values.
21. For a resource, the Transfer Type field can be either Direct or In transit. Direct is used when the resource delivers the excess directly to the Return To location.
22. Optionally, enter a Carrier name and a Waybill number for the return.
23. Enter a Shipment Number for the return.
24. Click OK.

For a resource (a field technician), an Inter-Organization transfer order is created. For a warehouse, an internal order is created.

Using the Planner's Desktop

This chapter covers the following topics:

- Planner's Desktop Summary
- Create and Maintain the Planning Tree
- Create and Make Planning Recommendations
- Create Warehouse Notifications
- View Parts Status on the Planner's Desktop UI

Planner's Desktop Summary

The Spares Management Planner's Desktop allows field service operations to maintain and monitor the status of their technician and warehouse inventories to ensure that each is properly stocked with the parts necessary to service customer needs. It also provides a planner a variety of tools to create automated min-max recommendations for field technicians and warehouses.

The Planner's Desktop leverages the notion of a Planning Tree, along with point-and-click functionality, to enable you to easily configure, maintain, modify, and use this application in accordance to your business needs. This easy-to-use UI streamlines the planning and parts replenishment process.

Through the Desktop, a planner can make min-max recommendations based on the personal usage of a specific technician, the "norm" for the territory, the "product norm," which uses calculated failure rates and product populations, or a combination of personal usage and territory norm or product norm.

The Planner's Desktop UI consists of a combination of two windows: A Navigator window, which is where the Planner's Tree is located, and the Planning window, which provides details of the node, warehouse, subinventory you are viewing. Point-and-click functionality connects the two windows in such a way that the Planning window always reflects the selected element on the Planning Tree.

When a node is selected, and this includes the top-level Spares Planning node, the Planning window displays three tabs: Planning Parameters, Parts Status, and Failure Rates.

When a subinventory selected, the Planning Window displays a Stock List and a Recommendation tab along with the above three tabs. When a Warehouse is selected, you see all five tabs displayed with the subinventory, along with an additional Notifications tab.

Sections in this chapter include:

- Create and Maintain the Planning Tree, page 5- 2
- Create and Make Planning Recommendations, page 5- 7
- Create Warehouse Notifications, page 5-21
- Managing Defective Parts With Depot Repair Integration, page 5-25
- View Parts Status on the Planner's Desktop UI, *ERROR: linkend not in current document and TARGET_BOOK_TITLE missing*

Using Loop Notifications

If you are using the Planner's Desktop in the Parts Loop or the Reporting Hierarchy view, click the following appropriate link for details:

- Define Parts Loops, page 6- 2
- Create and Use Loop Notifications, page 6- 4
- Create Reporting Hierarchy Nodes, page 6- 8

Create and Maintain the Planning Tree

Required

Spares Management's planning functionality begins with the creation of a tree structure that consists of any combination of nodes, warehouses, internal repair depots, and field technicians that make up your field service operation. Planners should construct the tree with appropriate business needs of their field service operation in mind. As a rule, any supply chain entity that needs to be planned or replenished with parts, or any entity where you need to view the inventory status, should be included in the tree.

The Spares Management module of the Oracle Field Service application comes "out of box" with a default Spares Planning node, which serves as the top level of the tree. From this node, you can create "sub-nodes," which you can populate with those organizations and subinventories (typically associated with field technicians) used in your operation.

Creating a planning tree in accordance to your business design allows you to better leverage Spares Management's recommendation functionality because you can set planning parameters at the node level, and the values set there will default down through the tree. You can also set parameters at the subinventory or organization level, which will override any parameters set higher in the tree.

Note: You can set planning parameters at the top-level Spares Planning node, and they will filter down throughout the tree, unless they are overridden at a subsequent level.

From the Spares Planning node, you can create sub-nodes only. But once you create a node, you can create other nodes, organizations, or sub-inventories below that node. Once a tree is created, you can use Spares Management's point-and-click functionality to plan, replenish, and track your inventories for the organization, or subinventory.

When you set up your planning tree, each node, organization or subinventory you create will require that some information be input in the Planning Parameters tab of the desktop UI.

Spares Management allows you to create subinventories that handle both usable and defective parts. Typically, a field technician will have at least one of each of these subinventories assigned to him. For example, technician A, servicing a particular territory, could have "subinventory1" assigned to him, which has his usable parts, and "subinventory2," which has the defective parts that he recovers from the customer's site.

Managing the Planning Tree is also necessary, as field service organizations are constantly changing. Spares Management provides easy-to-use mechanisms for updating the planning tree, including adding sub-inventories to the tree from an organization, moving subinventories from node to node, or deleting subinventories from a node.

For the steps detailing the process to manage subinventories, see *Managing*, page 5- 5 Subinventories on the Planning Tree.

You can launch the following concurrent programs from the Planning tree by right-clicking on the node you want to identify in the report and selecting the appropriate concurrent program:

- Create Min-Max Planning Report

For details on running this concurrent program see *Execute Routine*, page 4-17 Replenishment.

Create Excess Lists

For details on running this concurrent program see *Return Excess Parts*, page 4-18.

Create Part Availability Data

For details on running this concurrent program see *Create Parts Availability*, page 6- 5 Data.

Prerequisites

Organizations and subinventories must be defined in Oracle Inventory.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop

Steps

Follow these steps to create your Spares Planning Tree:

1. To set planning parameters at the top level for your planning tree, select the Spares Planning top node.
2. Within the Planning Parameters tab, you can enter parameters that you want to default down through the planning tree.

The parameters include:

Forecast rules, service level, excess rules, choosing whether or not the node is authorized for ASL, etc.

Note: Parameters entered at any node will default down the tree, but can be overridden at any node.

3. To create your first node, from the Navigator, select the Spares Planning node and right-click with your mouse.

4. From the drop-down list, select Add Planning Node.

The Planning Parameters tab refreshes and you can enter information here.

5. In the Planning Node field, enter the name of the Planning Node that you are creating.

Use a naming convention for your nodes that will make it easy for you to distinguish from one node to the next. Note, that in the Planning Parameters area, default values appear (if any) and the node where they are "defaulted from" is displayed.

6. Click Save.

The new node appears under the Spares Planning node in the navigator tree.

7. To add subinventories or organizations to the node, right-click the node you created.

8. To add a subinventory, select Add Subinventory from the drop-down list.

9. Choose the Organization that the subinventory you want to add belongs to from the list of values.

10. Choose the Subinventory you want to add to the node from the list of values.

11. In the Planning Parameters section, choose the Condition Type for this subinventory.

A subinventory can either be for "usable" parts or "defective" parts. This is a required field. To create a subinventory for defective parts, you must choose Defective in the Condition Type field. On the planning tree, Usable Parts subinventories will be distinguished by a green checkmark next to the subinventory name. Defective subinventories will have a red X next to the subinventory name.

Note: Other Recommendation Parameters are defaulted down from either the Spares Planning node, or the node you just created. You can override these parameters at the subinventory level, if necessary.

12. Click Save to save this subinventory to your Planning Tree.

Alternatively, you can add multiple subinventories to the tree from a particularly organization. See *Managing Subinventories on the Planning Tree*, page 5- 5 for details.

13. To add a warehouse to a node, right-click the node and select Add Warehouse from the drop-down list.

14. Choose the Organization you want to add to the node from the list of values.

Typically, this would be the warehouse that you set up as an organization in Oracle Inventory.

15. Enter the Notification Parameters for the warehouse, if necessary.

For more information on warehouse notifications, see *Create Warehouse* , page 5-21Notifications.

16. Click Save to save this warehouse to your Planning Tree.

17. You can create as many subinventories and warehouses as necessary to meet your business needs under each node. You can also create new nodes beneath a node on your tree.

For example, you might create a node called "North American Ops" with sub-nodes called West Region, Midwest Region, South Region, and so on. Each sub-node can contain subinventories, warehouses, or a combination of both.

Guidelines

Remember that it's best to create a tree structure that allows you to set planning parameters at the highest level possible. This allows you to manage a large field service operation without needing to set up every parameter for every field technician and warehouse in your operation.

You can search the Planning tree by using the Find function. The following parameters are available for search criteria: Resource type, Resource name, region and Node name. The tree will automatically expand to display the appropriate node, resource, or region when it is located.

Managing Subinventories on the Planning Tree

Field service operations require frequent maintenance to the tree structure as the business needs change. For example, if an organization restructures its territories and requires that some subinventories be moved from one node to another, while others need to be deleted or added. Spares Management provides a subinventory management UI to enable this maintenance.

Use the following procedures to add multiple subinventories from an organization, to move subinventories from one node to another or to delete subinventories.

- Add Multiple Subinventories to the Tree, page 5- 5
- Move Subinventories from Node to Node, page 5- 6
- Delete Subinventories, page 5- 6

Prerequisites

Organizations and subinventories must be defined in Oracle Inventory. A Planning Tree must be created in the Planner's Desktop.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop > Manage Subinventories

Add Multiple Subinventories to the Tree

To add multiple subinventories to the Planning Tree, follow these steps.

Steps

1. From the planner's desktop right-click the node you want to add the subinventories to and choose Manage Subinventories.
The Manage Subinventories window opens. The Node Name that you right-clicked appears.
2. Choose the Add radio button.

3. In the Organization field, choose the Organization from which you want to add the subinventories to the tree.
4. Click Find.
The Selection Lists spread table populates with the available subinventories.
5. Select the subinventory you want to add by clicking on the appropriate line.
To select multiple subinventories to add, perform a shift-key and click on each subinventory you want to add.
6. Choose the Condition type for the subinventories.
The options are Usable or Defective.
7. Click Add.
8. You will get a confirmation popup asking if you want to add the selected subinventories to the selected node. If yes, then click OK.

Guidelines.

If you want the Manage Subinventories window to remain open after you perform a process, select the Keep Window checkbox.

Move Subinventories from Node to Node

To move subinventories from one node to another on the Planning Tree, follow these steps.

Steps

1. From the planner's desktop right-click the node you want to move existing subinventories from and choose Manage Subinventories.
The Manage Subinventories window opens with the name of the selected node appearing in the Node Name field.
2. Select the Move radio button.
This changes the Condition field into a required Move To field.
3. Select the node into which you want to move the selected subinventories from the list of values in the Move To field.
4. In the Selection Lists spread table, choose the files that you want to move from one node to another.
5. Click Move.
6. You will get a confirmation popup asking if you want to move the selected subinventories to the selected node. If yes, then click OK.

Delete Subinventories

To delete one or more subinventories from a node, follow these steps.

Steps

1. From the planner's desktop right-click the node from which you want to delete subinventories and choose Manage Subinventories.

The Manage Subinventories window opens with the name of the selected node appearing in the Node Name field.

2. Select the Delete radio button.
3. In the Selection Lists spread table, choose the subinventories you want to delete from the node.
4. Click Delete.
5. You will see a confirmation popup asking if you want to delete the selected subinventories to the selected note. If yes, then click OK.

Create and Make Planning Recommendations

To automate the inventory planning of your field service operation you can produce min-max recommendations that define stocking levels for your field technicians and warehouses. Customer service agreements often require that parts inventories are deployed in numerous locations, close to the point-of-use. Spares Management planning defines what parts to be stocked, where, and in what quantities, for both technicians and warehouses.

In a large field service operation that includes many technicians and warehouses, a robust automated planning functionality is necessary to ensure that stocking levels are accurate and up to date. Planner's Desktop functionality is designed to handle the planning scenarios unique to a field service environment.

A typical field service operation, with regional warehouses and a staff of field technicians, must have the flexibility to create parts planning schemes that are appropriate for all technicians. A seasoned field technician working in a stable situation of a particular territory, for example, would have a well-defined profile of usage history that could be used for planning. Another scenario might involve a new technician who would not have any usage history, or a transferred technician who would be carrying usage history that is not appropriate to the new territory.

In the above scenario, it might be appropriate to make parts recommendations for the first technician based on what he normally uses to do his job. In this case, Spares provides a method to account for a technician's personal usage, and to figure that usage into appropriate min-max recommendations. But for new or transferred technician this method wouldn't work because the technician hadn't built up enough history to make effective min-max recommendations.

In these cases, Spares provides two other methods to make recommendations: using the "normal" usage figures of parts for all technicians in the territory, or by figuring out "failure rates" of particular products. In very complex technician scenario, a blended, combination of these recommendation methods may be necessary.

This planning process is driven by the concept of an Authorized Stock List (ASL), which can be updated automatically through Spares Management's recommendation functionality.

The ASL functionality includes automated ASL recommendations for technicians and warehouses, and flexible planning parameters, which can be defaulted from higher level nodes. You can also handle complex planning scenarios that involve a combination of planning methods with Spares.

Spares Management also provides a facility to automate min-max recommendations. By setting up business rules, designed to automate the routine changes to min-max levels, a planner can focus on reviewing larger changes based on quantity and value.

The three basic planning methods covered in this section are as follows:

- Set Up Personal Usage Recommendation Method, page 5- 8
- Set Up Territory Norm Recommendation Method, page 5-10
- Set Up Product Norm Recommendation Method, page 5-12

Four other functions related to planning are covered in this section:

- Define Automated Min-Max Recommendations Business Rules, page 5-14
- Generate Stock List Recommendations, page 5-16
- Add or Modify Authorized Stock List, page 5-18
- Set Up Supersessions, page 5-19

For more information on planning in Spares Management, see Chapter 6, Loop , page 6- 1 Planning, Notifications and Reporting Hierarchy.

Set Up Personal Usage Recommendation Method

Optional

Personal Usage is a recommendation method that uses the specific usage transactions associated with a technician or warehouse for planning. This method is used in the scenario where the technician is in a reasonably stable working situation where the usage history for the technician is likely to represent what will occur in the future.

The key drivers with this method are the forecast rule that you choose, combined with the Service Level and the EDQ factor. The forecast rule defines four key factors relating to a personal usage recommendation:

- Forecast Method: Determines how you want to calculate the forecast. Choosing "simple average," for example, means that you'll make recommendations based on averaging the part usage for the usage history of the part.
- Period Size: This determines the length in days of the period used for a forecast. For example, 7 would mean that each period translates into a week.
- Forecast Periods: This determines how many periods you want project out.
- History Periods: Represents how many periods of history you want to use for your calculations.

You can set up the recommendation method at any level in your tree. All lower nodes will use this method as the default unless you manually override it with a new recommendation method.

Prerequisites

Organizations and subinventories must be defined in Oracle Inventory.

A forecast rule must be set up. Usage transactions must be created either in the debrief process, or by using the transaction type "Field Service Usage" in Oracle Inventory.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop

Steps

Follow these steps to set up a personal usage recommendation method:

1. Expand the Planner's Tree and select the node, warehouse or technician for which you want to set the recommendation.
2. In the Planning Parameters tab of the main Planning Parameters tab, choose the Forecast Rule from the list of values.
3. Enter a Service Level for the recommendation.

The service level represents the percent of time you want the technician or warehouse to have the parts on hand when needed. This is used to determine the Safety Stock levels.

4. Enter the Economic Delivery Quantity (EDQ) Factor.

This is a combination of carrying cost and ordering cost in the classical lot sizing formula.

Note: Typically, an EDQ Factor in the range of 10-15 will produce the desired results

5. To create a stock list for the technician or warehouse, select Yes in the Authorized ASL field.
6. If you want to include Safety Stock in your recommendation calculations, choose Yes in the Use Safety Stock field.

Generally, the use of Safety Stock is suggested for the warehouse recommendations. For the technician, it's dependent on user preference.
7. Optionally, you can choose the name of the Planner responsible for the node.
8. If you want to exclude a particular category set from being considered in recommendations, choose the set from the list of values at the Exclude Category Set field.
9. In the Recommendation Method field, choose Personal Usage from the list of values.
10. Save your work.

Guidelines

The right column of the Planning Parameters tab (labeled Defaulted From) lists the node where the existing values have defaulted from. If you want to allow lower level nodes to override any of these parameters, the Override checkbox must be selected next to this parameter. By default, the Override checkbox is selected for all fields.

For details on using the Personal Usage method modified by population change, see Use Personal Usage Recommendation Modified by Population, page 5-10.

Use Personal Usage Recommendation Modified by Population Change

The Personal Usage recommendation method can be enhanced when you combine it with product population changes. This method is primarily used to plan a warehouse for major changes in population, but it also could be used for the technician if a major population change has impact.

This modification is beneficial because product population changes can affect the total usage on a part for a technician or a warehouse. For example, if a technician routinely uses 10 parts a week of a specific part, that number is appropriate as long as the part population in his territory remains static. But if there is a population change -- either by gaining or losing customer's contracts -- then the warehouse or technician's recommendation is modified either up or down.

Spares Management allows you to use the failure rate against the population change, and apply the change in usage against the warehouse or technician's current usage. The adjusted usage will incrementally adjust the recommendation up or down.

For details on setting up and using failure rates, see Set Up Product Norm , page 5-12 Recommendation Method.

Prerequisites

You must have set up and calculated failure rates for a specific product.

Steps

To set up a Personal Usage method that is modified by part population change, follow the steps:

1. From the planner's desktop, set up the personal usage method as detailed in steps 1-10 of Set Up Personal Usage Recommendation Method, page 5- 8 .

Note: You must calculate failure rates at a higher node in the tree than the warehouse or technician where you plan to employ them in combination with personal usage planning.

2. Click the Failure Rates tab and in the Product field, choose the item for which you want to consider failure rates in the technician's personal usage formula.
3. Enter the Population Change figure (either a positive or a negative number) in the appropriate field.
4. Save your work.

Set Up Territory Norm Recommendation Method

Optional

Territory Norm calculates usage that is average or typical for the planning tree node the technician is assigned to. This method is used in the scenario that involves a new technician or a transferred technician from another territory.

New or transferred technicians will have no relevant usage in the territory they are coming into making it difficult to stock the technician with appropriate parts. By calculating the normal usage of all the technicians in a given territory over a set period of time, you can define min-max recommendations that represent what is typical or average for a technician in the territory.

Note: This method is not used for planning a warehouse.

A simple example of the territory norm approach is illustrated in the following scenario:

Say there are 100 technicians currently in the territory and that Part A has usage equal to 2000, summarized for all technicians assigned to the node for the current 10-week period. The territory norm for Part A would be 2.0 per tech per week or (2000 units / 100 techs / 10 weeks).

Using the territory norm method, Part A would have recommended min-max levels based on usage equal to 2.0 per week for the new technician assigned to the territory.

The assumption for this example is that all technicians had been in the territory for the entire 10-week period. If this were not the case, technician weeks would be accumulated based on the actual number of weeks each technician had been assigned to the node during the defined period.

Usually, the Territory Norm method is used to get a technician started. Once a new technician has worked long enough to create a personal usage history, for example, you might want to switch to that method at a later time.

Note: This planning method should not be used unless all technicians assigned to the node are performing similar tasks.

Prerequisites

Organizations and subinventories must be defined in Oracle Inventory.

A forecast rule must be set up. Usage transactions must be created either in the debrief process, or by using the transaction type "Field Service Usage" in Oracle Inventory.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop

Steps

Follow these steps to set up a territory norm recommendation method:

1. Expand the Planner's Tree and select the node, or technician for which you want to set the recommendation.

This method is not used for a warehouse recommendation method.

2. In the Recommendation Parameters section of the Planning Parameters tab, choose the Forecast Rule from the list of values.

The History Periods from the Forecast rule is used to determine how much usage history to use in the average weekly usage calculation.

3. The Service Level field is not used in the recommendations when Territory Norm is used. Leave the field null.

4. Enter the Economic Delivery Quantity (EDQ) Factor.

This is a combination of carrying cost and ordering cost in the classical lot sizing formula.

5. To make this available for your authorized stock list recommendations, select Yes in the Authorized for ASL field.
6. Safety Stock, which is derived from Service Level, is not used in the Territory Norm Method.
7. Optionally, you can choose the name of the Planner responsible for the node.
8. If you want to exclude a particular category set from being considered in recommendation parameters, choose the set from the list of values at the Exclude Category Set field.
9. In the Recommendation Method field, choose Territory Norm from the list of values.
10. Save your work.

Set Up Product Norm Recommendation Method

Optional

Product Norm is a recommendation method that uses product populations and failure rates to plan the min-max levels for the warehouse or technician. The product norm typically is used in the scenario where a new product is being introduced or the population of an old product is being increased, decreased or extended into a new area.

When using the product norm, failure rates are typically calculated at a higher level node such as a territory, region or theater and used on a lower level node such as a warehouse or technician. Failure rates are calculated from product population and usage transactions collected from the field service debrief process where the service request has defined the product being serviced.

Note: Calculating the failure rates at a higher level node maximizes the population of parts and increases the accuracy of the failure rates.

Failure rates in Spares Management are expressed in terms of *usage per product per week*. Failure rates can be entered manually as in the case of a totally new product or calculated for an existing product where usage experience is available and population is known.

The failure rates are used along with the anticipated product population to determine expected usage for the technician or warehouse. The population can either be expressed as a new population or as a change to an existing product population, either up or down.

To create a Product Norm recommendation, first you must calculate or enter failure rates at a higher node level, then set up the Product Norm recommendation at the warehouse or technician level, and then use those failure rates in Product Norm planning.

Prerequisites

Organizations and subinventories must be defined in Oracle Inventory.

A forecast rule must be set up. Usage transactions must be created either in the debrief process, or by using the transaction type "Field Service Usage" in Oracle Inventory.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop

Steps

Follow these steps to create a Product Norm recommendation:

1. To set up and calculate Failure Rates, click the Node in the Planning Tree where you want to calculate the failure rates and select the Calculate Failure Rates checkbox.

This method can be applied to any level on the planning tree, but as a best practice, you should calculate Failure Rates at the highest feasible level.

2. Click the Failure Rates tab and, in the Product field, choose the product for which you want to create failure rates from the list of values.
3. Enter the Current Population of the product for which you are creating failure rates.
4. Save your work.

At this point, you've entered parameters to calculate failure rates, which will be used to set your min-max recommendations at a lower level node in the tree

5. To calculate failure rates, select the node on the planning tree where you entered your product and population information and right-click.
6. From the drop-down list, select the Calculate Failure Rates concurrent program.

In the Parameters window, choose the Planning Node in which you want to calculate failure rates for.

A concurrent request ID number will appear in a popup box. This concurrent request will update the failure rates for your product and parts. To check if the concurrent program ran successfully, go to View > Requests and look up the request ID number of the request you want to view.

You can override the calculated failure rates, by entering a value manually. You might want to use this feature if the manufacturer of a part has published failure rates, for example.

7. Expand the node for which you calculated failure rates and select the warehouse or technician for which you want to use those failure rates in Product Norm recommendations.

Note: You must calculate failure rates at a higher node in the tree than the warehouse or technician where you plan to employ them.

8. In the Recommendation Parameters section of the Planning Parameters tab, choose the Forecast Rule from the list of values.

The History Periods from the Forecast rule is used to determine how much usage history to use in the failure rate calculation.

9. The Service Level field is not used in the recommendations when Product Norm method is used. Leave the field null.
10. Enter the Economic Delivery Quantity (EDQ) Factor.

This is a combination of carrying cost and ordering cost in the classical lot sizing formula.

11. To create a stock list, select Yes in the Authorized for ASL field.

12. Safety Stock, which is derived from Service Level, is not used in the Product Method.
13. Optionally, you can choose the name of the Planner responsible for the node.
14. If you want to exclude a particular category set from being considered in recommendation parameters, choose the set from the list of values at the Exclude Category Set field.
15. In the Recommendation Method field, choose Product Norm from the list of values.
16. Save your work.

Use Blended Method for Recommendations

Spares Management functionality enables you to set up "blended" methods for determining stock list recommendations. This method, which combines personal usage method with either territory norm or product norm, allows you to combine two methods and assign weight to each on a percentage basis.

Territory Norm can be used in combination with Personal Usage and weighting factors are provided to define the percentages to use for blending of the two methods.

This blended method also could be used in the scenario where a technician has been off the normal field service routine for a period of time due to training or a special assignment. In this situation, the recent usage history would be understated due to the absence from normal technician tasks and usage reporting routines. Personal Usage, which is understated, would be used and supplemented with Territory Norm.

As detailed in Use Personal Usage Recommendation Modified by Population, page 5-10, you can use personal usage in combination with failure rates to include population changes.

Steps

To set up a blended recommendation method, follow the steps:

1. From within the Planning Parameters tab, at the Recommendation Method field, choose either:
 - Personal Usage and Product Norm
 - Personal Usage and Territory Norm
2. Enter a percentage, using a decimal point, in the Personal Usage > Norm field.
This is the weighted percentage that you want for personal usage.
3. Enter a percentage, using a decimal point, in the Personal Usage < Norm field.
4. Enter a percentage, using a decimal point, in the Personal Usage = Zero field.
5. Enter a percentage, using a decimal point, in the Norm = Zero field.

Steps 2-5 are mutually exclusive. Depending upon the usage during a given period, Spares Management functionality will use one of the four parameters to determine the Stock List recommendations.

6. Save your work.

Define Automated Min-Max Recommendations Business Rules

In field service operations where planners have large numbers of stocking level recommendations to review and implement, it makes sense to automate routine

recommendations. This functionality reduces planning and technician costs and frees up the planner to focus on high-impact situations.

In these situations, you can create business rules that automate this process based on low value and/or quantity change, combined with good forecasting.

Rules are defined by providing values for the following parameters:

- Value change and percentage
- Quantity change and percentage
- Tracking signal min-max levels for tracking forecast errors

Note: You can set values for as many or as few of the parameters as you want. But for the automated process to be activated, ALL the parameters that have been set must be met.

In the cases of value change and percentage, quantity change and percentage, and tracking signal max, the actual value must be less than the value of the parameter to meet the automation condition. For the tracking signal min parameter, the actual value must be greater than the parameter value. To qualify for automation, all parameters as entered must be met.

Use the following procedure to define business rules for automated min-max recommendations.

Prerequisites

None

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Setup > Business Rules

Steps

1. From the Business Rules window, click the Recommendation Rules tab.
2. Enter the Name of the Recommendation rule.
3. Enter an optional Description.

Note: For steps 4-9, you can enter values for as many or as few of these parameters as you want, in accordance to your business rules. For the automated process to be activated, however, all the parameters that have been set must be met.

4. Enter a number for the Value Change.
This represents the difference between the current max value and the max recommendation value.
5. Enter a number for the Value Change %.

This represents the difference between the current max value and the max recommendation value expressed as a percentage of the current max.

6. Enter a number for the Quantity Change.

This represents the difference between the current max value and the max recommendation value.

7. Enter a number for the Quantity Change %.

This represents the difference between the current max value and the max recommendation value expressed as a percentage of the current max.

8. Enter a Tracking Signal Min value.

This measures the forecast error when actual usage on a cumulative basis is running less than what was forecast. This is a negative value.

9. Enter a Tracking Signal Max value.

This measures the forecast error when actual usage on a cumulative basis is running more than what was forecast. This is a positive value.

10. Save your work.

Generate Stock List Recommendations

Once you have set up planning parameters for your field service operation, you can create recommendations by running a concurrent program. The recommendation can be reviewed and accepted, rejected, or modified.

If you accept a min-max recommendation, it will move into the Stock List tab where it will become the current min-max levels used when you are replenishing parts for a warehouse or technician.

When you review the recommendations in the Recommendations tab, the following values are displayed in the spreadsheet:

- Delta Cost between current max and recommended max
- Actual cost of current max
- Actual cost of recommended max
- Delta min between current min and recommended min
- Delta max between current max and recommended max
- Usage history and forecast can be viewed in the lower tabs

Note: The spreadsheet in the Recommendations tab can be sorted by any of the columns displayed. This is useful as you review the recommendations because you can prioritize by relevant criteria such as Actual Cost, Cost Recommended, Delta Cost, Delta Minimum, Delta Maximum, etc.

Prerequisites

Planning Parameters must be entered.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop

Steps

Follow these steps to make min-max recommendations:

1. In the Spares Planning Tree, right-click on the node, warehouse, or subinventory for which you want to make ASL recommendations.
2. If there has been a usage change, run the Create Usage For Recommendations and the Create ASL Recommendations concurrent programs.

In the Create ASL Recommendation parameters window, enter the planning node for which you want to create recommendations. A popup window displays the concurrent request ID number.

If the tree structure has changed, also run the Create Usage Rollup concurrent program. If you need to consider supersession activity, run the Process Superseded Items concurrent program.

3. View the requests (View > Requests) and make sure the concurrent program has run successfully.
4. Right-click the same node, warehouse and subinventory and select the Generate ASL Recommendations concurrent program from the drop-down list.
A popup window displays the concurrent request ID number.
5. Click the Recommendation tab and review the recommendation values displayed in the spreadtable.

Note: If you are using the automated feature, those recommendations will not appear in the spread table. They are automatically accepted and implemented.

6. If you want to accept a Recommendation in the ASL, select the recommendation and click the Accept button.

The recommendation is removed from the spreadtable and placed into the Stock List tab spreadtable. Accepted recommendations automatically update the Oracle Inventory table for min-max values.

7. If you want to reject a recommendation, select the recommendation and click the Reject button.

The recommendation is removed from the spreadtable.

8. If you want to manually override the a stock list recommendation, select the recommendation and click the Stock List tab.
9. Enter the values you want to recommend for the stock list in the Min Qty and Max Qty fields.
10. Click Accept to save your new values.

Guidelines

You can also accept or reject multiple ASL Recommendations by selecting all the lines of recommendations you want to accept (Shift key + down arrow, or Ctrl + mouse click) and clicking the Accept or Reject button.

Add or Modify Authorized Stock List

Within the Stock List tab, the existing stock list is displayed in the spreadtable. You can copy the stock list to another subinventory, or you can add and delete items to this stock list.

Note: The spreadtable in the Stock List tab can be sorted by any of the columns displayed. This is useful if you want to view the stock list using different sorting parameters such as Item, Minimum Quantity, Maximum Quantity, and so on.

Prerequisites

Planning Parameters must be entered.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop

Steps

Follow these steps to modify or add to the existing stock list:

1. Navigate to the Stock List tab and select the line you want to modify.
2. In the lower portion of the window, select the Stock List tab.
This displays the existing stock list.
3. Enter the new values you want to add.
The fields you can modify include Min Quantity, Min Order, Max Quantity, Max Order, Source Type, Organization, and Subinventory.
4. Save your work.
5. To add a part to the stock list, click the Add button in the upper Stock List tab.
The lower Stock List tab is refreshed and the fields are blank.
6. In the Item field, select the Part you want to add from the list of values.
The Unit of Measure and Cost values default in.
7. Enter the values you want to set for the part being added.
Optionally, you can select a Source Type. If you select a Source Type of Inventory, you must select the Organization.
If the stock list was manually created, you can enter a reason for the manual override. This reason is displayed in the Reason Code field.
8. Optionally, you can enter a value in the Fixed Lot Multiple field.
If there is a specific number of parts that are typically shipped in a package (i.e. 12 parts per box), you can enter that number here. Replenishment orders will be rounded to the closest multiple of your Fixed Lot Multiple figure.
9. Save your work.

Guidelines

You can delete a min-max recommendation from the Stock List tab by selecting the recommendation and clicking the Delete button.

From the Stock List tab, you can also view details about the part through the Usage, Forecast, and Parts Status tabs.

You can also copy a stock list from one subinventory to another by selecting the line in the stock list, clicking Copy, and then selecting the subinventory you want to copy the stock list line to.

Set Up Supersessions

The supersession represents a supplier-driven business situation where one part has been replaced by another part. The supplier typically notifies the customer that a part has been replaced and is no longer available. All new orders should be placed for the superseding part. In some cases, the supplier will dictate that existing orders be converted to the superseding part.

Ideally, when a supersession occurs, the min-max levels are positioned on the top part in the supersession chain. But in the scenario where inventory is available on the superseded part, the best inventory utilization strategy would keep the min-max levels positioned on the superseded part until the inventory is exhausted in the supply chain. This will drive parts out to the technicians where the parts can be used and the inventory depleted. Where to position the min-max levels in the supply chain is determined by whether inventory is still available for the part that has been replaced, and whether that inventory can be utilized based on the disposition parameter.

Spares Management incorporates supersessions in both its Authorized Stock List (ASL) recommendation functionality and Warehouse Notification functionality.

Supersessions have a major impact on ASL recommendations because Spares Management automatically positions the min-max levels for a part in the supersession chain to achieve maximum utilization of available inventory. Depending upon the disposition of inventory on the part being superseded, Spares Management produces the min-max levels for the appropriate part, either the one being superseded, or the superseding part, depending on the inventory level in the supply chain.

There are two disposition values: Scrap and Use to Depletion.

A disposition of Scrap indicates that inventory on the lower level part cannot be used at all and should be scrapped. This disposition causes the Min-Max levels to move to the superseding part as soon as the supersession is entered.

The Use to Depletion disposition indicates that inventory for the lower level part can be used consistent with the rules defined by supersession type. This disposition causes the Min-Max levels to transfer to the superseding part when the inventory is exhausted.

To illustrate this latter scenario, consider a supersession where Part A is replaced by Part B and the on-hand quantity for Part A at the central warehouse is 500 at the time the supersession is entered. The central warehouse also has a Min level of 50. In this scenario, Spares Management recognizes the need to utilize the 500 pieces of inventory under the Use to Depletion disposition option. The Min-Max levels for the technicians stay at Part A until the inventory at the Central Warehouse drops below the reorder point (ROP) or the min level. This drives the parts out to the technicians where usage occurs and inventory is depleted.

During the transition, while inventory on Part A is being depleted, Min-Max levels are planned for Part B if there is usage history for Part B. When the central warehouse inventory drops below the min level, the technician Min-Max levels shift to Part B and are calculated based on the combined usage for both Part A and Part B. Min-Max levels for the Central Warehouse shift to Part B when the supersession was entered and are calculated based on the combined usage for both Part A and Part B.

Similarly, planning warehouse stocking levels is designed to allow warehouses -- other than the central warehouse -- to deplete the inventory of superseded parts. The central warehouse is always positioned at the top of the supply chain and, as such, min-max levels are also positioned at the top part in the supersession chain. Because supersessions are a supplier driven business scenario, the central warehouse automatically switches its min-max recommendation to the superseding part coming in because it will no longer be receiving any inventory for the superseded part.

For an intermediate warehouse, on the other hand, min-max levels are coordinated with the disposition parameters and supply chain inventories. This allows the intermediate warehouse to deplete any leftover inventory of the superseded part that might still exist at the central warehouse. If the disposition of a superseded part is set to "Use to Depletion," then an intermediate warehouse can position min-max level at the superseded part until the inventory is depleted. Once depleted, the min-max level switches positions to the superseding part.

In this way, Spares Management supersession functionality enables a field service operation to support supersessions and minimize obsolescence at the same time.

To set up supersessions, use the following procedure:

Prerequisites

There must be items set up in Inventory.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Setup > Define Supersessions

Steps

1. In the Find Supersessions popup window, enter a search criteria if you want to locate some existing supersession relationships. To set up a new supersession, close the window.
2. In the main Supersessions window, select the part that is being replaced from the list of values in the Replaced Item field.
3. Choose the item you want to supersede the replaced item from the list of values in the Superseding Item field.
4. Optionally, you can choose a Repair To Item value from the list of values.

This value defines the highest level in the supersession chain that the lower level part can be repaired to. Ideally, the lower level part could be repaired to the top part in the supersession chain. But this is not always technically or economically possible. For example, Part A has been superseded by Part B but Part A cannot be repaired to Part B. In this scenario the Repair-to part for Part A would be Part A.

5. Choose a Reciprocal value for the supersession.

Options include: Bilateral or Unilateral. Bilateral is the scenario where an order for Part B, the higher level part, can be filled by either Part A or Part B. In the Unilateral scenario, an order for Part B can only be filled by Part B. The lower level Part A can not be used to fill an order for Part B. An order for Part A can always be filled with Part A unless the disposition is "scrap."

6. Choose a Disposition code for the superseded item.

This value defines how the disposition of inventory needs to be handled on the lower level part. Options include: Use to Depletion or Scrap.

7. Enter optional start and end dates for the supersession.
8. Save your work.

Create Warehouse Notifications

Warehouse notifications are designed for the more complex replenishment planning encountered at the warehouse where excess utilization, repair, and new-buy recommendations need to be incorporated into an integrated replenishment planning package.

While this functionality is typically used at the central warehouse, it can be used at any warehouse in the supply chain where excess and/or repair need to be considered.

The enhanced notifications process allows the planner to use a sequence of utilization approach where unfilled need at the central warehouse would be satisfied first by excess utilization, repair of defectives, and then new-buy.

To use notifications that incorporate excess and/or defective stock at a warehouse, you must have an ASL for the warehouse, and associate an assignment set for either the usable or the defective parts to the warehouse. The assignment set uses sourcing rules from Oracle Purchasing to associate those warehouses you want to consider for excess and defective parts for repair.

Once configured, you create warehouse notification results by running a concurrent program that identifies parts replenishment needs in the warehouse, searches the supply chain for existing excess and defective parts, and returns results that a planner can review and execute a replenishment strategy that best fits the business needs.

The planner has the option to fill the replenishment need by using existing excess stock, using repaired parts from the defective parts, by ordering new parts from a supplier, or by a combination of the three. The planner creates an internal order and/or a requisition for a purchase order once a replenishment strategy is chosen.

Spares Management also provides a facility whereby a planner can create business rules that allow the notification process to bypass the planner review process. In cases of routine replenishment, such as those situations when forecast accuracy and notification value are routine, the automated process frees up a planner to focus on exception situations in the review process.

Note: Notifications can only be used for warehouses and not for field technicians.

Also covered in this section:

- Set Up and Create Central Warehouse Notifications, page 5-22

- Create Business Rules to Automate Warehouse Notifications, page 5-23
- Warehouse Replenishment Notifications, page 5-24
- Managing Defective Parts With Depot Repair, page 5-25

Prerequisites

An Authorized Stock List must exist for the warehouse. Also, if you are considering excess and defective parts, assignment sets must be set up.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop

Set Up and Create Central Warehouse Notifications

Use the following procedure to set up and create central warehouse notifications:

Steps

1. Expand the planning navigation tree and select the warehouse that you want to set up for notifications.
2. Click the Warehouse Parameters tab.
3. Optionally, enter an EDQ Multiple.
The Economic Delivery Quantity (EDQ) is used to define order quantities. The EDQ multiples are used as an on-order limit to define excess on order.
4. In the Assignment Usable field, choose the assignment set to define excess in the notification from the list of values.
Assignment Sets are set up during implementation and define those warehouses in the supply chain that you want the notification to use when looking for excess parts. See the *Oracle Purchasing Implementation Guide* for details on setting up assignment sets.
5. If you are using Spares Management's Depot Repair functionality, choose a Depot Repair assignment set, which along with sourcing rules, defines the internal repair depot as a supplier for specific parts.
6. Optionally, enter a Min Value figure.
This is a minimum value for the excess on-order notification. A Min Value of 100, for example, would mean that a notification is kicked off only if the total value of the excess on-order notifications exceeds \$100.
7. In the Assignment Defective field, choose the assignment set that you want to use to define defective inventories available for repair for notifications.
The assignment set, along with the sourcing rules, defines the defective warehouses to use to define defective parts for the notifications.
8. If you are using business rules to automate routine notifications, choose the rule you want to apply to this warehouse from the Notification Rule list of values.

9. Save your work.

At this point, you have configured your central warehouse to allow notification functionality.

To generate a notification, continue with the following:

10. Run the Warehouse Notifications concurrent program.

Return to the main navigation tree and open Reports and Programs to access this concurrent program.

Create Business Rules to Automate Warehouse Notifications

Creating business rules to automate warehouse notifications is beneficial when planners have a large number of Warehouse Notifications to execute and when the notification cycles need to be processed frequently to insure timely replenishment.

These rules are setup to address notifications that reflect a low notification value combined with a good forecast reliability. You can create automation rules for the following three new-buy notification types:

- Internal Order - This represents transfer orders between warehouses.
- WIP Order - This is used when manufacturing is required.
- Requisition - This is used when purchasing is required.

In each of the above cases, you can enter excess value, repair value, recommendation value, and min-max values for tracking signals.

- **Excess value** -- This is the value of excess inventory that can be used to satisfy the notification.
- **Repair value** -- This is the value of defective inventory that, when repaired, can be used to satisfied the notification.
- **Notification value** -- This is the value of the notification recommendation.
- **Tracking Signal Min** -- This measures the forecast error when actual usage on a cumulative basis is running less than forecast.
- **Tracking Signal Max** -- This measures the forecast error when actual usage on a cumulative basis is running more than forecast.

Note: You can set values for as many or as few of the parameters as you want. But for the automated process to be activated, ALL the parameters that have been set must be met.

For all parameters with the exception of the tracking signal min, if the actual value is less than the parameter value, the notification is triggered. In the case of the tracking signal min, if the actual variance is more than the parameter value, the notification is triggered.

Note: You can only set up one Notification Rule for each warehouse.

To set up automated notification rules, follow this procedure.

Prerequisites

None

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Setup > Business Rules

Steps

1. From the Business Rules window, click the Notification Rules tab.
2. Enter the Name of the rule.
3. Optionally, enter a Description.
4. For the Internal Order Line, enter an Excess Value number.
5. Enter a Repair Value.
6. Enter a Recommended Value.
7. Enter Tracking Signal min-max values.
8. Repeat steps 4-7 for Requisition and WIP Order lines.
9. Save your work.

Warehouse Replenishment Notifications

Notifications are used for warehouse replenishment and provide additional information on excess parts and defectives that, when repaired, can be used to satisfy the notification.

When you open the Notifications tab, you will see a spreadsheet that displays the notifications for those parts where the on-hand available and on-order has dropped below the established Min level for the part. The excess parts as defined by the usable assignment set is displayed in the Total Excess column. The number of defective parts, as defined in the defective assignment set, is displayed in the Total Repair column.

The Notification Quantity column displays the quantity needed to replenish the warehouse. When you select one of the notifications, the lower panel of the Notifications tab displays the breakdown of what's available to fill the replenishment notification. For example, if there are excess parts and defective parts available, there will be multiple lines displayed in the table:

- Internal orders set up to utilize excess
- The total available in repair or the repair depot order
- The purchase requisition, WIP order, or internal order

The planner can review this information and create a replenishment order based on what works best in this situation.

A planner can replenish a part from this UI by creating an internal order (if excess stock is used), or by creating a requisition for a purchase order, or by creating internal orders and a repair order to have the parts repaired at an internal depot.

Prerequisites

An Authorized Stock List must exist for the warehouse. Also, if you are considering excess and defective parts, assignment sets must be set up.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop

Steps

To replenish parts using excess, depot repair, and new parts, follow these steps:

1. In the Notification tab, select the Notification of the part you want to review.

A brief description of the part is displayed in the Description field.

In the lower panel of the Notifications tab, the breakdown of parts orders for replenishment is displayed.

2. To use excess parts, navigate to source type "Excess" in the lower Notifications tab and enter the Quantity of parts you want to use from the excess parts available in the Order Quantity field.

This figure must be less than or equal to the Available Quantity.

3. To create a purchase requisition, navigate to source type "Purchase Order" and enter the requisition quantity in the Order Quantity field.

4. Click the Order button to submit your request.

You will create an Internal Order for the excess stock that you plan to use and you will create a requisition for a purchase order for those parts you plan to buy from a supplier to fill the request.

Note: If a lower part in a supersession chain has defectives, those are rolled into the total defectives for the higher part. For example, if Part A has a "repair to" status of Part B, and there are eight defective Part A's and 10 defective Part B's, then the Part B notification will display a defective amount of 18 parts.

For more information on supersessions, see Set Up Supersessions, page 5-19.

Managing Defective Parts With Depot Repair Integration

Spares Management provides a mechanism to handle the repair of defective parts through an internal depot. In this case, parts that are owned by the field service operation can be repaired internally and returned. This provides a low-cost source of parts replenishment and results in a reduction of obsolete inventory. This requires that the Oracle Depot Repair application is installed at the internal depot.

Typically, the following Spares Management supply chain scenario is addressed by this solution: A repair depot, enabled by Oracle Depot Repair software, is positioned in the supply chain to repair defective parts. This relationship is defined in sourcing rules where the internal repair depot is defined as a repair supplier.

In this situation, field technicians recover defective parts at the customer site, which are then transacted into the technicians' defective subinventories. At that point, the technicians transfer the parts into a defective warehouse for consolidation. The consolidated defectives then can be integrated into the warehouse replenishment

planning presenting the planner with a notification when defective parts need to be repaired at the internal depot.

Once this notification is approved, it automatically creates an internal order to ship the defectives to the internal depot, a repair order for the depot, and an internal order for shipping the repaired parts back to the field service warehouse.

In the repair depot, the defective parts are received against the initial internal order, repaired, and shipped against the second internal order.

Spares Management also enables a planner to create a depot repair order from the Parts Status tab on the Planner's Desktop in those cases where a planner needs to repair parts without a Warehouse Notification for replenishment.

To repair parts based on a Warehouse Notification and using the depot repair functionality, follow this procedure.

Prerequisites

Oracle Depot Repair and Oracle Order Management must be installed. You must provide an assignment set value for the Depot Repair Suppliers field for the warehouse that is integrated with Depot Repair.

Also, the internal depot must be defined as an organization, along with a sourcing rule that defines an internal depot.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop

Steps

1. In the planning tree, click the warehouse for which you want to view notifications.
2. Click the Notifications tab.
This displays all the notifications related to the selected warehouse.
3. Select the notification for which you want to create a depot repair order.
4. If the quantity that you want to order is different than the actual quantity on the notification, enter the new value.
5. Click Order to execute.

View Parts Status on the Planner's Desktop UI

Within the Planner's Desktop there are two tabs that provide a planner with easy-to-access information that is crucial in the Spares Management process.

These two tabs are:

- Parts Status
- Order Detail

Parts Status

The Parts Status tab displays information for the parts on hand at the warehouse or subinventory selected. A spread table displays such information as part number, usable on-hand, defective on-hand, parts in transit, requisitions, purchase orders, and so on. You can update the information on the Parts Status tab by right-clicking on the warehouse or subinventory and running the Parts Availability Data concurrent program.

You can order parts from this tab by selecting the part you want to order and clicking the Order button. This action brings up the Parts Requirement page, where you can create a parts requirement and an order.

On the bottom panel of the Parts Status tab, there are four sub-tabs:

- Usage
- Forecast
- Parts Status
- Stock List
- Order Details

Each of these tabs displays information pertaining to the selected item in the Parts Status tab. The Parts Status and Stock List sub-tab correspond with the same tabs on the top panel of the Parts Status tab.

Order Details

The Order Details tab provides a view of incoming orders for an item at the subinventory or organization level. This tab is a sub-tab viewable in both the Parts Status tab and the Notifications tab. If there is no order associated with the organization or subinventory, the tab will not be enabled.

The Order Details tab displays the following information: Item, quantity, UOM, expected delivery date, source name, order type, order number, status and line type.

Set Up cross-ref to the first chapter (overview) and the appropriate section. RH

Loop Planning, Notifications and Reporting Hierarchy

This chapter covers the following topics:

- Loop Planning, Notifications and Reporting Summary
- Define Parts Loops
- Create and Use Loop Notifications
- Create Reporting Hierarchy Nodes
- Implementing Spares Management
- Assigning Territories to Planner Groups

Loop Planning, Notifications and Reporting Summary

Spares Management also supports the alternative planning approach where individual sub-inventories can be grouped into Planning Loops for control of the total inventory across all sub-inventories in the loop. This is sometimes referred to as aggregate planning where the planning loop is used to coordinate planning and execution activities across multiple locations.

Spares Management has the flexibility to configure multiple planning loops within a single service operation. The planning loop can include sub-inventories from different inventory organizations. The loop can also include both usable and defective sub-inventories.

Spares Management uses a Master Stock List to define the plan for the Loop. The MSL defines the parts and total quantities to be stocked in the loop. In addition, the MSL provides for a minimum usable quantity to insure that the loop maintains a reasonable balance of usable parts.

Notifications can be generated by running a concurrent program when the total available is above or below plan conditions as defined in the Master Stock List. Notifications will also be generated when the level of usable parts has dropped below the minimum usable on-hand level as designated in the Master Stock List.

The Planner's Desktop provides for an organized presentation of the functionality used for planning and execution at the location and loop levels, by including icons that you can point-and-click to change the UI. Although the view defaults to the Planner's Desktop UI, navigation icons included on the desktop are the loops, reporting hierarchies and notifications icons.

In the Reporting Hierarchy area of the Planner's Desktop, you can create hierarchies that can be used to summarize inventory balances, view on-order quantities, and view usage and forecast information. Reporting hierarchies also provide a tool for parts searches.

Reporting hierarchies consist of a group of virtual nodes, designed around your organizational or geographical reporting structure. Each node can contain other nodes or subinventories. Each subinventory can belong to only one reporting hierarchy.

The following sections are covered in this chapter:

- Define Parts Loops, page 6- 2
- Create and Use Loop Notifications, page 6- 4
- Create Reporting Hierarchy Nodes, page 6- 8

Define Parts Loops

The parts loops is a group of subinventories that is planned together as a single entity. A parts loop can cross more than one inventory organization and more than one operating unit. At least one parts loop must be set up if the planning functionality of Spares Management is used.

These are the steps required to set up parts loops:

- Create a Parts Loop, page 6- 2
- Assign Subinventories to a Parts Loop, page 6- 3
- Define Master Stock List, page 6- 3

Create a Parts Loop

To create a parts loop, follow this procedure.

Prerequisites

Define calculation rules. Define planners. Define forecast rules.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop> Parts Loop (icon)

Steps

1. Highlight the Parts Loop folder in the navigator tree.
2. Right click the Parts Loop folder to open a pop-up menu.
3. Select Create Parts Loop in the menu to open the Loop Details tab.
4. Enter a parts loop name in the Loop Details tab.
5. Optionally enter a description for the parts loop.
6. Select a planner from the Planner list of values.
7. Select a calculation rule from the Calculation Rule list of values.

8. Select a forecast rule from the Forecast Rule list of values
9. Save your work.

Your new parts loop appears in the navigator tree.

Assign Subinventories to a Parts Loop

When you assign subinventories to a parts loop, you must specify whether the subinventory is for tracking usable or defective parts. You can also choose to use the Auto-receipt feature for this subinventory. With Auto-receipt enabled, shipments are received automatically at the source subinventory during the ship confirm process.

Prerequisites

Define the parts loop.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop > Parts Loop (icon)

Steps

1. Click the + sign next to the Parts Loop folder in the navigator tree.
2. Right-click the parts loop to which you want to add subinventories.
3. Select Add Subinventory from the pop-up menu. The Location Details tab opens.
4. Select an organization name from the Organization list of values.
5. Select a subinventory from the Subinventory list of values.
6. Select a condition type of Usable or Defective from the Condition Type list of values.
7. Optionally select the Auto-receipt check box.
If you select this feature, parts shipments are received automatically during Ship Confirm at the destination subinventory.
8. Select the Spares Location check box.
The Spares Location check box has no functionality at this time.
9. Save your work.

Define Master Stock List

A Master Stock List is the component of a parts loop that defines the allowable quantity of usable and defective parts.

The Master Stock List (MSL) defines the part numbers and corresponding quantities that are stocked in the parts loop. The MSL is required if parts are stocked on a planned basis in a parts loop.

The Loop Quantity represents the total quantity that is required in the loop and includes the availability elements as defined in the calculation rule. The Minimum Usable quantity represents the Usable On-hand quantity that is required in the loop. Notifications to the planner are generated when either of these quantity criteria are not met.

Prerequisites

You must define a parts loop before you can create a master stock list.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop > Parts Loop (icon)

Steps

1. Highlight the appropriate parts loop in the Navigator tree.
2. Open the Master Stock List tab.
3. Enter an item number or select an item from the list of values that you want to add to the Master Stock List. The Item field is case sensitive.
4. Select the revision from the list of values, if applicable.
5. Select a planner from the Planner list of values.
6. Enter the desired loop quantity for this item.
7. Optionally enter the minimum usable quantity for this item in the Minimum Good field.
8. The Plan Type field defaults based on the item definition.
9. Save your work.

Create and Use Loop Notifications

Planning at the loop level involves the comparison of actual loop quantities to the Master Stock List quantities. When the available quantities of parts are greater than or less than the inventory levels defined for the parts loop, a notification is created for review and processing by the planner.

In the Parts Loop area of the Planner's Desktop, you can administer the Master Stock List for the loop. You can define and maintain the loop parameters such as selecting the calculation and forecast rule. You can also view part availability for the loop. Finally, you can assign, update and view the usable and defective subinventories that are included in the parts loop.

Prerequisites

Define a Parts Loop.

Steps

The following steps for using parts loops are described in more detail:

- Create Part Availability Data, page 6- 5
- Create Usage History, page 6- 5
- View Usage and Forecast Data, page 6- 6
- Create Notifications, page 6- 6

- Process Notifications, page 6-7

Create Part Availability Data

The Create Part Availability Data concurrent program compiles part availability data for the loop. This availability data is used to update summary quantities that are displayed in planning loops and hierarchies. The summary data that appears at the node levels in the Planner's Desktop are updated only by this concurrent program. The availability data is also used to determine whether notifications should be generated.

Prerequisite

Parts loops must be defined.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Reports and Programs > Create Part Availability Data

Steps

1. Open the Create Parts Availability Data concurrent program.
2. Click Submit.
3. Click No in the Decision window.
4. To see the status of your concurrent request, click View from the menu and click Requests.
5. Click Find to view the status of all your requests.

Create Usage History

Usage activity is a component of planned inventory levels and is also used for forecasting future usage activity. The Create Usage History concurrent program gathers usage statistics, which can be viewed in the Planner's Desktop.

The procedures for running the Create Usage History concurrent program follows.

Prerequisites

None

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Reports and Programs > Create Usage History

Steps

1. Open the Create Usage History concurrent program.

2. There are no parameters for this program, so click Submit.
3. Click No in the Decision window.
4. To see the status of your concurrent request, click View from the menu and click Requests.
5. Click Find to view the status of all your requests.

View Usage and Forecast Data

A forecasting tool is available on the Planner's Desktop to aid the planner in the planning process. Multiple forecasting techniques are provided and the forecast for the part is viewable by location, loop, and reporting hierarchy.

Prerequisites

Run the Create Usage History concurrent program to gather usage statistics.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop > Parts Loop (icon)

Steps

Use this procedure to update the usage history information and view the forecast and usage information.

1. Click the + sign next to Parts Loop.
2. Click on the parts loop for which you want to view forecasting information.
3. Open the Parts Status tab.
4. Click Find in the Find Items window to execute a blind query for all parts.
5. Click on an Item number and view the Usage/Forecast information in the bottom of the window.
6. Open the Graph tab to view the usage data, represented by a red line, and the forecast data, represented by a green line.

Create Notifications

The Create Notifications concurrent program compares the Available quantities that are calculated by the Create Part Availability Data concurrent program to the desired quantities that were defined by the MSL in the parts loop. Notifications to the planner are created when one of the following conditions occurs:

- The Available quantity for this part is above the total loop quantity by more than the allowable percentage
- The Available quantity for this part is below the total loop quantity by more than the allowable percentage.
- The usable quantity for this part is below the minimum usable quantity

Prerequisite

Run the Create Part Availability concurrent program first, so the notifications are based on the most recent quantities.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Reports and Programs > Create Notifications

Steps

1. Select the Create Notifications concurrent program.
2. Click Submit.
3. Click No in the Decision window.
4. To see the status of your concurrent request, click View from the Tools menu and click Requests.
5. Click Find to view the status of all your requests.

Process Notifications

Notifications are used for advising the planner that the parts inventory is above or below quantities defined in the Master Stock List. You can view and take action on open notifications in the Planner's Desktop. Notifications have a status of either Open, Pending or Closed.

Prerequisite

Run the Create Notifications concurrent program.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop > Notifications (icon)

Steps

1. Click the + sign in front of Notifications.
2. Click the + sign in front of the parts loop name to open the loop folder.
3. The notification categories are Above, Below and Not Enough Usable Parts. Click the + sign in front of the notification category you want to view. Within each notification category, you can choose Open, Closed, or Pending.
4. Click on the Item number in the Open folder to view the notification.
5. Open the Master Stock List tab to view the Master Stock List parameters for the Item in the notification.

6. Open the Parts Status tab to view the details of the part's status. The detailed view of the status includes the availability elements for the part.
7. There are five actions you can take on an open notification:
 - You can change the quantity on the Master Stock List.
 - You can create a move order to transfer parts to the location that needs them.
 - You can create an external requisition to purchase an additional quantity of parts.
 - You can create a WIP order to have the parts repaired internally.
 - You can create an external requisition to have the parts repaired externally.
8. After taking the appropriate action regarding the notification, you can update the status of the notification to Pending or Closed.

Create Reporting Hierarchy Nodes

Creating reporting hierarchies is an optional step because reporting hierarchies are not required for either the logistics or planning processes. However, even if you are not going to use Spares Management Loop Planning, you must set up either one parts loop or one reporting hierarchy. This loop or hierarchy is required to define the additional attributes for the destination subinventories used in Spares Logistics.

The following required steps for setting up reporting hierarchies are described:

- Create the nodes and relationships of the reporting hierarchy.
- Assign subinventory locations to the nodes.

Prerequisites

Subinventories must be defined so you can add subinventories to your reporting hierarchy. Hierarchy nodes must be created from top to bottom.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop > Reporting Hierarchy (icon)

Steps

To create reporting hierarchy nodes:

1. Click the + sign next to the Reporting Hierarchy folder to open it.
2. Right-click the Reporting Hierarchy folder to open a pop-up menu.
3. Select Create Reporting Hierarchy to open the Hierarchy Details tab.
4. Enter a node name.
5. Save your work. Your new node appears in the navigator.
6. To add a node to your new node, right click your new node and follow steps 4 through 6.

Assigning Subinventories to Nodes

When you assign subinventories to a reporting hierarchy node, you must specify whether the subinventory is for tracking usable or defective parts. You can also choose to use the Autoreceipt feature for this subinventory. With Autoreceipt enabled, shipments are received automatically at the source subinventory during the ship confirm process.

Prerequisites

Create reporting hierarchy nodes.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Planner's Desktop > Reporting Hierarchy (icon)

Steps

1. Click the + sign next to the Reporting Hierarchy folder to open it.
2. Click the + signs in your reporting hierarchies nodes until you reach the node to which you want to assign a subinventory.
3. Right click the node to which you want to assign a subinventory to open a pop-up menu.
4. Select Add Subinventory to open the Location Details tab.
5. Select an inventory organization from the Organization list of values or accept the default value.
6. Select a subinventory from the Subinventory list of values.
7. Enter a Location Name. A location field is populated from the address or location assigned to a subinventory in Oracle inventory application.
8. The location address and country are entered automatically from default values.
9. Select a condition type of Usable or Defective from the list of values.
10. Optionally select the Autoreceipt check box if you want to use the auto-receipt feature for this subinventory.
11. Select the Spares Location check box. The Spares Location check box has no functionality at this time.

Implementing Spares Management

The following sections detail Field Service Spares Management specific implementation tasks:

- Define Forecast Rules, page 6-14
- Define Calculation Rules, page 6-16
- Define Excess Rules, page 6-17
- Define Task Parts, page 6-18

- Define Parts Priorities, page 6-20
- Define Delivery Times, page 6-20
- Define Resource Addresses and Subinventories, page 6-22
- Assigning Territories to Planner Groups, page 6-23

Set Up Skills Management

In order to effectively manage a field service representative's skills, and assign tasks to technicians that have the right skills, you must define the skills, skill levels and the scales to use.

Skills fall into three major categories: product skills, other technical skills, and non-technical skills. The skill level indicates the expertise scale of the field service representative's skill. For example, expert, trainee, and experienced could be skill levels.

The following topics are covered in this section:

- Set Up Rating Scales and Skill Levels, page 6-10
- Define Skills Types and Skills, page 6-11

Once you have set up rating scales, skill levels, defined skills sets and skills, you can add skills to a resource and assign skills to a task. For more information on that process, see the *Oracle Field Service User Guide*.

Set Up Rating Scales and Skill Levels

You can define multiple skills scales, which you can use when you are creating skills sets and skills. There are two seeded scales in Field Service:

Seeded Field Service Scales

Scale Name	Seeded Skill Levels
Field Service Standard	Trainee, Standard, Expert
Field Service Extra Scale	Low, Moderate, High

You might want multiple rating scales available for your Field Service operation if you have a large technician force with a variety skill levels for the tasks you perform. Or, you may already have a rating system in place in your operation, which uses different values than those seeded here. In any case, Field Service allows you to set up as many rating scales as you need.

Note: You can add your own skill levels to those in the seeded scales. Note that once you add a skill level, you cannot delete it.

Once you have defined your rating scales and skill levels for each scale, you use the rating scales when you are creating the Skills Sets.

Prerequisite

None

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Skills Management

Steps

Use this process to set up a new rating scale:

1. Open the Skill Levels tab and open a new form.
You can do this by navigating down through the seeded scales until you reach a blank form.
2. In the Rating Scale section, enter a Name for the Rating Scale.
3. Optionally, enter a Description.
4. The From Date defaults to the current date. You can change this, if needed.
If you want the Rating Scale to be available indefinitely, leave the To date blank.
5. To set the skill levels for the rating scale, in the first line of the spread table in the Levels section, enter a numerical value in the Order field.
This number determines what order the skill levels will appear in the list of values.
6. In the Name value, enter the word or words you want to represent the skill level in the list of values.
(For example: trainee, expert, top, gold level, etc.)
7. Optionally, enter a brief description of the skill level.
8. The From date defaults to the current date that you are setting up the rating scale. You can change this date, if necessary.
9. Repeat steps 5-8 for each skill level you want to associate with this rating scale.
10. Save your work.

Guidelines

If you want to inactivate a Rating Scale, enter a To date in the appropriate field in the Rating Scale section. If you want to inactivate a particular skill level within a Rating Scale, enter a To date in the field next to the skill level you want to inactivate.

Define Skills Types and Skills

Skills are the Field Service representative's competencies. Skills fall into three major categories: product skills, other technical skills, and non-technical skills. You can set up skill types and then populate them with specific skills, which will enable a dispatcher to make informed decisions when assigning technicians to tasks, or when assigning particular skill requirements to a task that has yet to be scheduled.

To illustrate this concept, consider the following scenario: Your Field Service operation services computer systems, hardware, software, networking, etc. A potentially useful skill type could be named "Operating Systems," which you would assign to those technicians who are competent in servicing operating systems. Furthermore, you may

service customers using a variety of operating systems. So you might want to add the following values to your skill type: Windows NT, Mac, Windows 2000, Solaris, etc.

You can set up as many skill types with related skills as needed for your Field Service operation.

Prerequisite

Rating Scales must be set up, if you are using anything other than the default

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Skills Management

Steps

Use this process to set up skills and still types:

1. Navigate to the Skills tab.
2. In the Skills Type section, enter a name of your skills type.
3. Optionally, enter a Description.
4. In the Use Scale field, choose the rating scale that you want to use when assigning skills to a resource.

The rating scale you choose will determine the list of values available for assigning skills to a resource or a task.
5. The From Date defaults to the current date. You can change this date, if necessary.
6. Optionally, enter a To Date.

You can enter a To Date if you want to end the use of a particular skill type.
7. In the Skills section spreadsheet, enter a Skills Name on the first line.

This name should reflect a skill related to the Skill Type it is associated with.
8. Enter a Description of the Skill.
9. Optionally, enter an Alias for the skill.
10. The From Date defaults to the current date. You can change this date, if necessary.
11. Optionally, enter a To Date.

You can enter a To Date if you want to end the use of a particular skill.
12. Repeat steps 7-11 for each skill you want to associate with the Skill Type.
13. Save your work.

Set Up Tasks Custom Color Coding

Color coding tasks that can be viewed in the Field Service Dispatch Center allows a dispatcher to quickly identify a multitude of situations, such as high priority tasks, escalated tasks that need immediate rescheduling, tasks "in jeopardy," and tasks that have been committed to a customer and cannot be rescheduled.

By default, only a limited number of colors are used in Field service. In the Plan Board, yellow is attached to a task with actual times, and red is used when a task is escalated. In the Gantt chart, yellow and red have the same use, and blue is used when a task has scheduled times. Furthermore, green is used in the Scheduling Advice window to identify a plan option.

You can enhance this color-coding functionality greatly through a custom setup. There are 36 colors, of which 35 are available for custom coding. (Green is a reserved color.) The following properties relating to tasks are available to use in determining your color-coding scheme:

- Task Type
- Task Priority
- Task Status

Plan option will automatically be assigned Green, the reserved color just as it is in the standard configuration. Using the custom color coding configuration will greatly enhance a dispatcher or planner's ability to effectively manage the day-to-day field service operations.

To set up your custom color coding, perform the following setups.

Prerequisites

The profile option "CSF: Use Custom Color Coding Scheme" must be set to Yes in order to set up custom color coding.

Task Types, Task Statuses, and Task Priorities must be set up.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Task's Custom Color Setup

Steps

1. At the Task's Custom Color Setup UI, enter a Color Determination Priority number.
In the case of a conflict between two color coding schemes, the color with the lowest priority number will prevail.
2. In the Type field, select the Task Type that you want to associate with this color configuration from the list of values.
3. In the Priority field, select the Task Priority to be associated with this color configuration.
4. In the Status field, select the Task Assignment Status that you want to associate with the color configuration from the list of values.

To distinguish between tasks by status, for example, you could choose Blue to represent all tasks of a certain type (say "Repair at Site") with the status of "Approved," and you could set up an orange color configuration for tasks of type "Repair at Site" without distinguishing the status. To ensure that the Approved status takes precedence, you would have to set the Color Determination Priority number lower for the first color configuration. In this scenario, tasks of type Repair

at Site with a status of Approved would appear in blue, and all other tasks of type Repair at Site would appear as orange.

5. Choose the Color for your color configuration.

The Custom Colors palette is displayed where you can choose from the available colors. The characteristics of the color you choose will be displayed in the Background Color Value section in the RGB Value and Decimal Value fields.

6. If you want the color to apply only to those situations where the task has been escalated, select the Escalated? checkbox.

You will need to enter the same configuration twice, once with the Escalated? checkbox selected and once without to distinguish between the two situations.

7. If you want the custom color configuration to be usable in Field Service, select the Active? checkbox.

8. Save your work.

Guidelines

You can set up any number of color configurations by simply changing any one of determining factors (Type, Priority, Status, Escalated).

Define Forecast Rules

Forecast rules are used to determine how forecast information is calculated. A forecast rule is a dependency for defining parts loops. Forecast rules are also used in making Min/Max recommendations for Authorized Stock Lists.

Forecast Methods

Several forecast methods are provided in Spares Management:

- The Simple Average forecast method is based on the number of history periods selected.
- The Weighted Average forecast method is based on the number of history periods, and you can assign different weights to each history period.
- The Exponential Smoothing forecast method provides another version of weighted averages. The smoothing constant Alpha is used to define the weight given to the current history period.
- The Trend Enhanced forecast method produces a trended forecast. Beta is a smoothing factor for the trend and is used to define the weight given to current trend. Alpha is a smoothing factor for the constant and is used to define weight given to current period history.

Forecast Rules Parameters

The list below details the parameters that are defined for forecast rules:

- The Rule Name is the name of the forecast rule.
- The Description field contains a description of the forecast rule.
- The Period Size is measured numerically in days. If you wanted to set up a weekly period, for example, you would enter 7.

- The Forecast Periods field indicates the number of periods in the future for which you want to see a forecast.
- The History Periods field indicates the number of periods in the past that you want to include in the forecast calculation.
- The Alpha field is used in the Exponential Smoothing and Trend Enhanced methods. In exponential smoothing, alpha is the factor that determines how much weight to apply to current period usage. In the trend enhanced method, the alpha factor determines the constant to be used in the formula.
- The Beta field is used in the Trend Enhanced method and is the factor used to determine the trend, which is used in the formula.
- The Weighted Average Period Index fields are used to specify weights for individual periods. For example, you can assign higher weights to more recent periods, if that is desired. The total of the period values must equal 1 and each value must be greater than zero and less than one.

Prerequisites

None

Responsibility

Field Service Dispatcher

Navigation

Dispatch Center > Spares Management > Setup > Forecast Rules

Steps

Use the following procedure to define forecast rules:

1. In the Forecast Rules window, enter a rule name in the Name field.
2. Optionally, enter a description in the Description field.
3. Select a forecast method from the Forecast Method list of values.
The choices are Simple Average, Weighted Average, Exponential Smoothing and Trend Enhanced.
4. In the Period Size field, select Weekly or Periodic. Periodic refers to accounting periods.
5. If you are using the exponential smoothing or trend enhanced method, enter the factor in the Alpha field.
This number is expressed as a fraction with a decimal point. Alpha would be greater than 0, and equal to or less than 1. (In most cases, the alpha factor should be set in the range of 0.15 - 0.25.)
6. If you are using the trend enhanced method, enter the factor in the Beta field.
This number is expressed as a fraction with a decimal point. Beta should be greater than 0, and equal to or less than 1. (In most cases, the beta factor would be set in the range of 0.15 - 0.25.)
7. Save your work.

Define Calculation Rules

Calculation rules are used to determine which availability elements are to be included when calculating the Actual Available quantity for the purpose of producing notifications for the planner. The most accurate definition of part availability for planning purposes can be achieved by using all availability elements.

The calculation rule includes a tolerance percentage to be used in loop planning to generate notifications. A notification is created whenever the parts quantity is over or under the loop quantity by the percentage specified.

The calculation rule also includes a value called Time Fence that represents the number of days in the future to be used when considering the availability elements.

A calculation rule is a dependency for setting up parts loops.

The availability elements used to calculate available quantity are listed below:

- Usable on-hand
- Defective on-hand
- Purchase orders (use this only if Oracle Purchasing is installed)
- Open WIP orders (use this only if Oracle Work in Process is installed)
- Open Requisitions (use this only if Oracle Purchasing is installed)
- Sales Orders (use this only if Oracle Order Management is installed)
- Move Orders
- Inter Org transfers
- In-transit Move Orders

Example of a Calculation Rule

Suppose you want your planner to be notified when the loop quantity exceeds 110% of the desired loop quantity. You also want to consider all orders due in the next twenty days when calculating the available quantity that is compared to the desired loop quantity. Below are suggested parameter settings of the calculation rule for this scenario.

- The Rule Name is Twenty Days.
- The Description is Include Availability Elements for 20 Days.
- All Availability Elements are checked.
- The Tolerance Percent is 10.
- The Time Fence is 20.

Prerequisites

None

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Setup > Calculation Rules

Steps

Use the following procedure to define calculation rules:

1. From the Calculation Rules window, enter a rule name in the Name field.
2. Optionally, enter a description in the Description field.
3. Select the appropriate availability elements.

The choices are: Usable on-hand, Defective on-hand, Purchase orders, WIP orders, Requisitions, Sales Orders, Move Orders, Inter Org transfers, and In-transit Move Orders.

4. Enter a tolerance percent.

This is used in loop planning to filter notifications that are within the tolerance percent. If a 10 is entered, for example, a notification will be sent whenever the quantity is plus or minus 10% of the desired quantity.

5. Enter the Time Fence in days.

This is used in loop planning to filter incoming and outgoing orders scheduled beyond a specified time period.

Define Excess Rules

You can define Excess Rules to filter out excess parts that do not have a significant impact on excess value. This allows the field technician and planner to focus on the few items that have a high impact.

If you do not use excess rules, all quantities that are greater than the maximum level in the ASL are considered to be excess and would then appear in the Excess List window for return.

Prerequisite

None

Responsibility

Field Service Dispatcher

Navigation

Field Service Dispatcher > Spares Management > Setup > Excess Rules

Steps

Use the following procedure to create excess rules:

1. From the Define Excess Rules window, enter a unique name for the excess rule.
2. Enter a Description for the excess rule.
3. Enter a value in the Total Max Excess field to represent a maximum allowable percentage of the total excess value.

For example, if you enter a 10 in this field, then excess parts are considered for return only if their total excess value is greater than 10% of the total max value. If this field is left blank, a zero is assumed and all excesses are considered.

4. Enter a value in the Line Max Excess field to represent a maximum allowable percentage of the total excess quantity for a line.
For example, suppose you enter a 10 in this field. If the maximum quantity is 20 and the onhand quantity is 21, this part would not appear on the excess list because the onhand quantity is less than 10% over the maximum quantity. If this field is left blank, a zero is assumed and all excesses are considered.
5. Enter a value in the Days Since Receipt field to represent the number of days you want to exclude when calculating the excess quantity.
This allows you to exclude recently received parts from the excess list. For example, if you enter a 10 in this field, then all of the parts received within the last ten days are ignored. If this field is left blank, a zero is assumed and all receipts are included in the excess calculation.
6. You can enter a value in either the Total Excess Value field OR the Top Excess Lines field.
Enter a value in the Total Excess Value to represent the percentage of total excess value that you want to see on the excess list. For example, if you enter a 80 in this field, the excess list will show the excess lines that comprise the top 80% of the total excess value.
Alternatively, you can enter a value in the Total Excess Lines field to represent the number of lines that you want to see on the excess list. For example, if you enter 50 in this field, the excess list will contain the 50 highest value lines.
7. You can enter or select a value for Category Set if you want to exclude an item category from return, such as supplies.
A category set is a feature in Inventory where you can define your own group of categories.
8. If you enter a value for Category Set, the Category field is enabled.
A category is a code used in Inventory to group items with similar characteristics.
9. Save your work.

Define Task Parts

You can define a list of parts that are typically required for a specific task. This task parts definition provides an efficient method for creating an internal order for a specific task. Using task parts definitions saves time because there is no need to manually enter which parts are needed. When a task parts definition is used, the predefined list of parts can be overridden, if necessary.

Tasks Parts are defined for combinations of products and task templates in the Define Task Parts window.

Parts can be defined automatically by running the Create Task Parts History concurrent program, which collects usage information from the Debrief process in Field Service and populates the calculated fields (quantity used, times used, quantity, percentage, etc.) based on the usage history associated with the product.

The Manual region of the window allows for the manual entry of items used on the the product and task template, or you can manually define parts in this window. The Rollup region summarizes the usage information for supersessions, if applicable. The usage is rolled to the top part in the supersession.

The Calculated region summarizes usage information and is populated by the Create Task Parts History concurrent program. If you choose to enter the parts manually, your manually entered values override the calculated values.

Prerequisites

- A Task Template must be defined.
- Products and items must be defined.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Setup > Task Parts

Steps

Use this procedure to Create a Manual Task Parts Definition:

1. Close the Find Product Task window by clicking the New button.
The Define Task Parts window opens.
2. In the Product field, select one from the list of values.
3. The product description is displayed on the right. The Task Template list of values displays task templates that have been defined for the product you selected.
4. Enter a valid Task Template name or select one from the list of values.
5. The Auto or Manual field will default to Manual when you save your work.
6. Skip the Times Used field. It will be populated with the number of times this task template has been used for this product, after running the Create Task Parts History concurrent program.
7. Skip the Task % field. It will be populated with a number representing the percentage of times this task template was used for this product, after running the Create Task Parts History concurrent program.
8. In the Define Parts section, choose the first part number in the Item field that you want to associate with this task from the list of values.
9. The Unit of Measure defaults in the UOM field depending on the item you selected.
10. Enter a revision number in the Rev field, if applicable for this part.
11. Enter the quantity of parts required for this task.
12. Enter a value in the % (percentage) field to represent how often this part is expected to be used in this task template/product combination.
13. This percentage value is used to calculate the Priority.
14. Optionally, enter the Start Date or End Date to enable or disable this parts task definition on a specific day.
15. Repeat steps 7-12 for each additional part.
16. Save your work.

Define Parts Priorities

In order to aid scheduling, including Oracle Advanced Scheduler, in determining the priorities for assigning and scheduling technicians who require parts to fulfill their task requirement, you can define priorities, descriptions, and upper and lower percentages for parts.

There are two seeded priorities: All Parts and No Parts. These values, along with those defined by the user, are available for scheduling purposes, either through Advanced Scheduler functionality, or manually through the Advise button on the Dispatch Center.

Prerequisites

None

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Setup > Part Priorities

Steps

Use this process to set up the values available for parts priorities:

1. In the Parts Priorities UI, enter the Lower and Upper Range of the Parts Priority.

This is a numeric value and represents a percentage of part availability.

2. Enter a code for the Priority of the part.

This code can be alpha-numeric, but it should be meaningful for an end user. For example, if the priority is high, you might want to enter P1 as the Priority designation. If it were low, you might want to enter P4.

3. In the Meaning field, enter a meaning of the Priority, which will appear in the list of values in Advanced Scheduler.

Note: The Meaning should be text that makes sense in relation to the part priority you are trying to represent. A high percentage priority range, for example, should be reflected by a similar meaning (i.e. High range=100 : Meaning=P1).

4. Optionally, enter a Description of the Priority in the Meaning field.

For example, for a Priority = P1, then the description could be Description = Highest Priority.

5. Repeat steps 1-4 for each additional priority you want to create.
6. Save your work.

Define Delivery Times

Spares Management provides a method for specifying the delivery times for shipment methods that are defined in Oracle Inventory.

For example, if your carrier can guarantee overnight delivery by a specific time of day, this information allows Oracle Advanced Scheduler to schedule your field technician based on the arrival time for the part.

Prerequisites

Shipment methods must be defined in Oracle Inventory.

Freight Carriers must be defined in Oracle Inventory.

Responsibility

Field Service Manager

Navigation

Field Service Dispatcher > Spares Management > Setup > Delivery Time

Steps

1. From the Define Delivery Time window, execute a query for the organization you want to update.

You can do this either by using the Find All menu option, or if you know the organization you want to update, you can Query By Example.

The window displays the shipping methods and freight codes that have been defined in Oracle Inventory for each inventory organization.
2. Enter a value in the Lead Time field for the number of time units this freight carrier commits to make a delivery.

For example, for an overnight delivery, enter a 1 in this field and then choose Day in the UOM field.
3. In the UOM field, enter the unit of time that corresponds to the previous field, Lead Time.
4. Enter the carrier's expected delivery time in the Delivery Time field.

This value is expressed in military time. For example, if you enter a 1, the UI will display 01:00, or one o'clock in the morning.
5. Enter any time value between 0100 and 2400 in the Cutoff Time field.

The Cutoff Time is the time for which you must have the order entered to achieve the lead time and delivery time. For example, if the order is entered by 16:00 hours, then the part can be delivered by the next day (Lead Time = 1) by 10:30 (delivery time). Otherwise, if the order is entered after 16:00 hours, then the cutoff is missed for that method of shipment and the part would be delivered in two days where the lead time is set to 1.
6. The Time Zone field will default to the time zone associated with the organization that you choose.
7. Enter a number in the Comfort Zone in hours.

The Comfort Zone (Hours) is the time you want to allow between the expected delivery time of the part and the scheduled arrival of the field technician.
8. Save your work.

Define Resource Addresses and Subinventories

You can assign ship to addresses and subinventories to your field technicians in the Resource Addresses and Subinventories window. A typical field service organization may have thousands of field technicians, so this window is designed to provide an efficient method for maintaining ship to addresses and subinventories for your field technicians. The addresses defined in this window appear in the list of values for the ship to address when you order parts in the Parts Requirement window.

The subinventories defined in this window appear in the list of values for the field technician's subinventories when you order parts in the Parts Requirement window. You can assign an owner for the subinventory, if needed. This feature can be used when more than one field technician shares a subinventory and one person needs to be assigned as an owner to be responsible for managing excess parts. When an owner is assigned, an organization and subinventory for returning the excess parts is also assigned.

Prerequisites

Field technicians must be defined as employees. Subinventories must be defined.

Responsibility

Field Service Administrator

Navigation

Spares Management > Resource Addresses and Subinventories

Steps

1. Select the appropriate resource type from the Resource Type list of values.
2. Select a field technician name from the Resource Name list of values. The list of values only displays the field technicians who have been assigned to the Resource Type you selected.
3. The Phone, Email, Start Date and End Date information for the field technician is displayed if these fields have been populated in Oracle HRMS.
4. The Addresses tab opens by default.
5. Select an address style for the appropriate country from the Address Style list of values.
6. Tab to the Address field to open the Location Address flexfield. Enter the details for the ship to address.
7. If you want this address to become the default address for this field technician, check the Primary Address check box. You can set only one address as the primary address and you must have one primary address.
8. You can define additional addresses for this field technician by adding more address lines.
9. Open the Subinventories tab to associate one or more subinventories to this field technician.
10. Enter an inventory organization or select one from the Organization list of values.

11. Enter a subinventory name or select one from the Subinventory list of values. The list of values displays only those subinventories which have been defined for the organization you selected.
12. You can select a value of Usable or Defective in the Condition field if the condition has not been defined in the parts loop. If the condition for this subinventory has been defined in the parts loop, this condition defaults in this field and is not updateable.
13. The Start Date defaults to today's date. You can override this date with a future date, if needed.
14. Check the Default column if you want this subinventory to be used as the default subinventory for this field technician. Only one subinventory for each Condition Type can be designated as the default subinventory for this field technician. You must define one usable subinventory as the default.
15. The Start Date field defaults to today's date. You can override this value to a date later than today's date, if needed.
16. The End Date field is used to inactivate a subinventory assignment.
17. If you check the Owner box, the field technician name is assigned as the Owner Name for this subinventory. Each subinventory can have only one owner.
18. Assigning an owner enables the Org and Sub fields in the Return region so you can specify the subinventory for returning excess parts. This location may or may not be the same location as the subinventory you are assigning the field technician. This subinventory must be of the same Condition Type as the source subinventory.
19. You can assign multiple subinventories to a field technician. You can assign subinventories from more than one organization to a field technician.

Note that the address of the resource subinventory is not picked up from the resource address. You must enter this manually.
20. Save your work.

Assigning Territories to Planner Groups

This setup screen is used to assign territories to planner groups. Planner groups are a group of resources (field service dispatchers) dedicated to planning and are setup in Resource Management. Territories consist of service representatives and are setup in Territory Management. Once this is setup this is the default group of territories that is shown to a planner group in the Dispatch Center.

Prerequisites

Create a resource group with field service dispatcher(s) assigned to it in Resource Management. Create a territory with service representatives assigned to it in Territory Management.

Responsibility

Field Service Administrator

Navigation

Setup > Assign Territories to Planner Groups

Steps

1. From the Select Planner Group window, select the resource group that represents the planner group you want to assign territories to from the list of values.
2. Click OK.
The Assign Territories to Planner Groups window is opened.
3. Select a territory from the list of values you want to add to the planner group. You can add multiple territories to a planner group.
4. Save your work.

Part 3

Field Service Portal

Configuring Field Service Portal

This chapter covers the following topics:

- Portal Configuration Summary
- Elements of the Dashboard
- Customizing the Dashboard

Portal Configuration Summary

This topic group provides an explanation of the elements comprising the Field Service Portal and provides process-oriented, task-based procedures for configuring the Dashboard. This chapter includes the following:

Elements of the Dashboard, page 7- 1

Customizing the Dashboard, *ERROR: linkend not in current document and TARGET_BOOK_TITLE missing*

Elements of the Dashboard

The field technician's dashboard provides a fully customizable view of all the assigned tasks, which can be filtered in a number of ways, and also includes other elements that provide easy-to-use entry points into the application.

The dashboard is divided into five main components:

- Search Area
- Main View
- Search Knowledge
- Quick Links
- Create Service Request

Search Area

The dashboard enables a technician to quickly search for a particular task or tasks by customer name, service request number, or task number. By selecting the criteria in the Search Task By field and entering a partial value in the search criteria field, a technician can quickly access specific task information.

Advanced Search functionality is also available. By clicking the hyperlink, a Search Task window appears where more detailed criteria can be entered. You also can create a search based on Scheduled Start Date of the task.

Main View

The Main View displays task information related to tasks assigned to a particular technician. The View displays columns containing information related to the tasks that you choose to display in the particular view. Field Service Portal has three seeded views: My Tasks, Open Tasks, Escalated Tasks. In each of these, the search criteria and the display columns is seeded and cannot be modified.

The seeded views display the following information in the spread table: task details, service request number, customer name, task number, update task (icon), subject, scheduled start date, planned effort, parts (if any), debrief (icon), and assignment status.

The spread table associated with a view displays relevant task information for each task that fits the search criteria for the technician. For example, the Tomorrow's Tasks view displays all tasks assigned to the technician scheduled to be worked on the following day.

The technician chooses a particular view for the default display (for example, My Tasks), but can access any of the views from the main page by selecting an alternative view and clicking Go.

Some task information displayed in the view, such as changing the task assignment status and updating the task, can be performed directly from the view. By clicking the details show/hide link, you can display more task details, or hide them if the particular task is expanded. Also, you can perform a debrief directly from the task view screen by clicking the Debrief icon. If there are parts associated with the task, an icon is displayed in the Parts column.

Search Knowledge

The Field Service Technician's Portal allows easy access to the Oracle Knowledge Management application. A user can make either a simple keyword search or an advanced solution search from the Portal Dashboard. This functionality allows a technician to access existing solutions for task-related problems.

Knowledge Management also can be accessed through the Update Task screen. In this case, the Service Request Summary is defaulted into the keyword search field, although it can be modified as needed.

Quick Links

The Quick Links section provides navigation links to mission-critical field service processes. By accessing these links, information is readily available and allows the technician to browse, compare and update information as needed. The technician will have the ability to access the following information from quick links:

- Create Parts Order
- Receive Shipments
- Return Excess Parts
- Return Defective Parts

Create Service Request

In normal field operations, technicians routinely discover situations where a new service request must be logged to address a customer issue that wasn't addressed in the original service request. In these cases, Field Service Portal provides a direct link to create a new service request by using existing service identifiers, such as part serial number, tag number, instance address, account name, and so on.

The technician can enter problem information on the service request and save it.

Customizing the Dashboard

Field technicians can arrange their dashboards to meet their specific needs. Field Service Portal comes with eight seeded views, which contain a set number of columns of display information. Furthermore, the amount of tasks displayed is set as well. But technicians can duplicate and modify the seeded views to personalize them, or they create an entirely new view in which the task search criteria is determined by the technician.

The following topics cover the dashboard customization:

- Create a View
- Personalize the View Display

Create a View

You can create a new view for the dashboard, which allows you to use any task search criteria you want, and also allows you to display only the data you want to see. New views are added to the list of existing views, which can be displayed at any time. You also can choose to make a new view default view.

When creating a view, you can set the number of tasks to display, whether or not should be the default view, what properties you want displayed in the columns, and the search criteria to use to find specific tasks.

Use the following steps to create a new View for your dashboard.

Prerequisites

None.

Responsibility

Field Technician's Portal

Navigation

Field Technician's Portal > Field Technician's Dashboard

Steps

1. From the main dashboard window, click Personalize.
The Personal Dashboard window appears. This displays a spread table with all your views.
2. Click Create View.
The Create View window appears.
3. In the General Properties section, enter the View Name.

4. Choose the Number of Rows Displayed from the drop-down list.
This determines how many tasks you want displayed on the view.
5. If you want this to be your default view, select the Set as Default checkbox.
6. Enter a brief description of the view.
In the Column Properties section, all the columns that can appear in the view will be listed in the Columns Displayed (In Order) dialog box.
7. Choose the columns that you don't want to appear in your view from the Columns Displayed (In Order) dialog box and remove them into the Available Columns dialog box.
You can determine the order of the columns by using the up and down arrows to move until you have the desired order.
8. In the Sort Settings section, choose the column you want to sort by and select whether or not the sort should be in ascending or descending order.
You can sort up to three columns. By default, there is no sort order selected.
9. In the Search Query to Filter Data in Table, set your criteria for the task search.
10. You can choose to require all your search parameters be met, or any one of the parameters be met by choosing the appropriate radio button.
The four default search parameters are service request, customer, task, or subject. You can choose to use any one or all of these parameters.
11. Once you pick a parameter to add to your search criteria, choose the qualifier you want to use to filter the parameter and then enter the a value in the field.
The possible search qualifiers are: is, contains, starts with, ends with. For example if you want to set up a view that only displays your tasks associated with a particular customer, you would use the following search criteria construction:

Search Criteria Example

Parameter	Search Qualifier	Value
Customer	is	<Customer name>

12. You can add a search parameter by choosing it from the list of values in the Add Another drop-down list and clicking Add.
13. Click Apply to save the view.

Personalize the View Display

You can personalize any of the default views in the dashboard by duplicating the view and then changing the parameters in the duplicate view to fit your needs.

Use the following procedure to personalize an existing view.

Prerequisites

None.

Responsibility

Field Technician's Portal

Navigation

Field Technician's Portal > Field Technician's Dashboard

Steps

1. From the main dashboard window, click Personalize.
2. In the spread table, select the radio button for the view that you want to personalize.
3. Click Duplicate.
The Duplicate View window opens. In this window, all the values of the original view are selected and displayed in the various fields and dialog boxes. At this point, you can modify any or all of the display fields.
4. In the View Name field you will see the following: Duplicate of [View Name]. Edit the field to name the new view.
5. You can change any of the settings in the General Properties section (rows displayed, whether or not to set the view as the default, and the description.)
6. Modify the columns that you want appear in your view by either moving them from the Columns Displayed (In Order) dialog box to the Available Columns dialog box -- to remove a column -- or move them from the Available Columns dialog box into the Columns Displayed dialog box to add them to the view.
7. Optionally, you can rename the columns by clicking Advanced Settings.
8. Change the column names as desired and click apply.
9. Set new Sort Settings, if applicable.
10. You can add additional task search parameters to the view in the Search Query to Filter Data in Table section.
11. When you have finished modifying the view, click Apply.

Guidelines

The new views that you create can be updated and modified at any time.

Using Field Service Portal

This chapter covers the following topics:

- Field Service Portal Summary
- Using Quick Links
- Update a Task
- Create Service Request

Field Service Portal Summary

This chapter provides process-oriented, task-based procedures for using the Field Service Portal to perform essential business tasks. Sections covered in this chapter include:

- Using Quick Links, page 8- 1
- Update a Task, page 8- 7
- Create Service Request, page 8-14

Using Quick Links

The Field Service Portal provides technicians with quick access to key processes they need to perform in their day-to-day activities.

This section provides the step-by-step procedures for the following functions:

- Create Parts Order, page 8- 1
- Receive Shipments, page 8- 3
- Return Excess Parts, page 8- 4
- Return Defective Parts, page 8- 6

Create Parts Order

Using the Field Service Portal, the field service technician has the ability to order parts specific to a task or independent of the tasks for their trunk stock.

Alternatively, to order a part specific to a task, the user clicks the update task icon from the dashboard, clicks the parts tab, and then clicks the order parts button.

Based on the sourcing rules and availability of parts within the technician's trunk stock the order parts functionality results in creation of one of three following scenarios:

- Purchase Requisition
- Internal order
- Reservation

To create a parts order independent of a specific task, follow these steps.

Prerequisites

None.

Responsibility

Field Technician's Portal

Navigation

Field Technician's Portal > Field Technician's Dashboard

Steps

1. From the Quick links section, click Create Parts Order.
The Create Parts Order window opens and a temporary Parts Requirement number is automatically created for the order. This is the first of a three-step process. The Parts Requirement number is not saved until you finish this process.
2. Verify that the Default Organization is correct. If not, choose a different organization from the list of values.
3. Verify the Address.
4. Select a Need By Date for the parts order.
5. Confirm the Destination Subinventory is correct. If it isn't, choose a different subinventory from the list of values.
6. Click Next.
The Create Parts Order: Parts window opens. This window displays all the information you have already added to the parts order in a display-only mode.
7. Enter the Required Item for the parts order or search for it in the available lookup table.
The UOM defaults after the item is selected.
8. Enter the Required Quantity.
9. Optionally, Enter the Ship Set value.
This value is set if you need to specify that certain items must be shipped together. A ship set is a group of order lines, linked by a common number, for which you want the full quantity to ship together
10. Click Next.
The Create Parts Order: Options window opens and displays the various options available to you to create the parts requirement. This is when the technician chooses the sourcing options for the parts order. The following chart details the fields and their respective definitions during this step:

Create Parts Order Field Definitions

Field Name	Definition
Required Item	This field shows all Inventory items that can be used to create the parts requirement.
Required Quantity	This field indicates the quantity required to create the parts requirement.
Supplied Item	If the required quantity for the item is not available, then the system checks for alternate parts like substitutes/superseded items based on the item setups and sourcing rule. If alternate items are available, then the order is created for them instead of the required item.
Item Type	The field indicates whether the supplied item is a substitute or superseded item
Available Quantity	This field displays the available quantity of the required item in the source organization based on the sourcing rule.
Source Type	This field indicates whether the order source is an outside vendor or an internal warehouse/inventory
Source	This field refers to the source organization in the cases of Internal orders and Reservations, or the field is null in case of a Purchase Order.
Shipping Method	Based on the Delivery Times and Shipping Methods set up, this field populates with the shipping method to be used to ship the order.
Arrival Date	Based on the lead times of shipping method and the order date, this field populates with the arrival date of the shipment.

11. Choose the Select radio button for the sourcing option you want to use for the parts order.
12. Click Finish to complete the transaction.

This action validates and saves the Parts Requirement number created in step 1, creates the order number, and generates a parts order confirmation.

Receive Shipments

Technicians can receive and deliver shipment to a final destination in one transaction using the Receive Shipments functionality of the Field Service Portal. The technician receives all quantities "as shipped" by the specified default destination subinventory. However, the technician also can update a shipment to receive it in to a different subinventory.

When the technician opens this window, it lists all the shipments from a supplier based on a purchase order, which is a shipment from inventory backed by an internal sales order. The corresponding Carrier, Shipment Number, Waybill and Packing Slip number should be displayed.

Prerequisites

None.

Responsibility

Field Technician's Portal

Navigation

Field Technician's Portal > Field Technician's Dashboard

Steps

1. From the Quick Links section, click Receive Shipments.
The Shipments window opens. The spread table displays all the incoming orders and includes pertinent information associated to the order such as Order Type, Vendor Number, PO Number, Shipment Number. expected receipt date, waybill number, and so one.
2. To receive the shipment, click the icon in the Receive column for the order you want to receive.
The Shipment Details window opens. This displays the item number and description of the item along with other detail associated with the order.
3. Choose the Select radio button if you want to receive the shipment.
4. In the Quantity field, verify that the number displayed how many of the item you want to receive. If the number is too many, you can edit it to reflect the amount you want to receive.
5. Verify that the Subinventory into which you are receiving the order is correct. If it is not, you can change it to reflect the correct sub-inventory.
6. Click Apply to accept the shipment.

Return Excess Parts

To find help information on returning defective parts, click Return Defective Parts., page 8- 6

Field Service Portal provides an easy-to-use mechanism to return excess parts, which may have been shipped to a technician for a task and not used. These parts end up in excess to the technician's authorized stock level and can be returned to a central warehouse.

Prerequisites

The Create Excess List concurrent program must be run to identify items where the inventory balance is greater than the maximum level. This program generates the list of excess parts, which you can access through the dashboard.

Responsibility

Field Technician's Portal

Navigation

Field Technician's Portal > Field Technician's Dashboard

Steps

1. From the Quick Links section, click Return Excess Parts.
The Return Excess Parts:Parts window opens. This is the first of a three-step process. This window displays a spread table with all the excess items associated with the technician's subinventories.
2. Choose the Select checkbox for the item that you want to return.
3. Verify that the quantity to be returned is correct. If it is not -- for example, if you only want to return a portion of the excess -- edit this field to reflect the amount you want to return.
4. Click Next.
The Return Excess Parts Details window appears. This spread table displays pertinent information, such as the source organization, source subinventory, item number, UOM and the return quantity.
5. If the parts are serialized, choose the serial numbers to be returned.
6. Optionally, enter Locator, Lot Number, and Revision Number, if your part is using these features from Oracle Inventory.
These fields will only be enabled if the item is serialized, lot controlled, or has a revision number.
7. Click Next.
If there are serial numbers or locator or lot numbers associated with the item, a second line will appear in the spread table, which you can fill out at this time. Otherwise, the Return Excess Parts: Destination window appears.
8. Enter a Waybill number, if applicable.
This field enables the technician to enter a waybill number in case of intransit excess returns.
9. Verify the Destination Organization and change it, if necessary.
10. Verify the Destination Subinventory or select one, if necessary.
11. Optionally, select a Carrier name from the list of values.
This field enables the technician to select a Carrier in case of intransit excess returns.
12. Enter the Shipment number for the excess part.
13. Click Submit.
This confirms the transfer and returns you to the portal dashboard.

Return Defective Parts

When a technician replaces a defective part with a new one, he must return the defective to the warehouse for repair or disposal. Field Service Portal provides a quick link to this process.

Returning excess defective parts uses a process which is similar to returning usable excess parts. The only difference is in the definition of excess and the application of business rules. Since defective sub inventories do not have min-max levels, all inventory is considered excess. Excess business rules do not apply to defective excess parts.

Prerequisites

None.

Responsibility

Field Technician's Portal

Navigation

Field Technician's Portal > Field Technician's Dashboard

Steps

1. From the Quick Links section, click Return Defective Parts.

The Return Defective Parts: Parts window opens. This is the first of a three-step process. This window displays a spread table with all the defective items associated with the technician's subinventories.

2. Choose the Select checkbox of the defective part you want to return.
3. Verify the quantity of defective parts you are returning or enter the quantity, if necessary.
4. Click Next.

The Return Defective Parts: Details window opens.

5. If the parts are serialized, choose the serial numbers to be returned.
6. Optionally, enter Locator, Lot Number, and Revision Number, if your part is using these features from Oracle Inventory.
7. Click Next.

If there are serial numbers or locator or lot numbers associated with the item, a second line will appear in the spread table, which you can fill out at this time. Otherwise, the Return Excess Parts: Destination window appears.

8. Enter a Waybill number, if applicable.
9. Verify the Destination Organization and change it, if necessary.
10. Verify the Destination Subinventory or select one, if necessary.
11. Optionally, select a Carrier name from the list of values.
12. Enter the Shipment number for the defective part.
13. Click Submit.

This confirms the transfer and returns you to the portal dashboard.

Update a Task

The technician's dashboard displays a spreadsheet with the tasks assigned to the technician as defined by the view that has been selected. Field Service Portal allows a technician to update an existing task by clicking the appropriate icon in the view spreadsheet. This enables the technician to add notes to a task, update a task assignment status, perform a debrief, and to create a follow-up task.

To create a follow-up task, see [Create a Follow-Up Task](#), page 8-12.

The user can alternatively click on either the parts icon, which will be enabled in case there are any parts associated with the task, or the debrief icon. Depending upon which icon a technician clicks, he will navigate to the corresponding sub-tab on the Update Tasks window.

The header of the Update tasks window contains the following information:

Update Tasks Field Definitions

Field Label	Description
Task Number	This refers to the sequence generated number for the task. It will be displayed as header on Update Tasks UI.
Task Name	This refers to the subject of the task. It will be displayed as header on the update tasks UI.
Task Type	This refers to the type of task.
Task Status	This refers to the task status (open, closed, etc.).
Task Priority	This refers to the priority of the task.
Assignment Status	This refers to the assignment status for that task (Accepted, Cancelled, etc.).
Escalation Level	This refers to the escalation level of the task.
Planned Effort	This refers to the estimated time it will take to complete the task.
Travel Distance	(Optional) This field can be enabled at the profile option level and allows the user to capture distance traveled between task assignments.
Travel Start Time	(Optional) This field can be enabled at the profile option level and allows the user to track the time traveled between task assignments.
Travel End Time	(Optional) This field can be enabled at the profile option level and allows the user to track the time traveled between task assignments.

Within the Update Tasks window, there are several sub tabs and expandable sections that the technician can view and update. The following list defines the sub-tabs and what actions are available to the technician within the tabs:

Show Service Request

The details of the service request that the task is associated with can be viewed and updated. To view the details, click the +/- button to the left of the Show Service Request heading.

Once expanded, the following information can be viewed: Service request number, severity level, customer name and address, contact name, item, item description, problem, problem summary, resolution summary, and resolution. There is also a Pro Forma Invoice button, which the user can click to view a report that details all the charges entered for the task performed at the customer site.

The user also can enter information in the resolution summary field detailing the issue addressed at the customer site. The problem code is selected at the time the service request is created from a list of pre-defined lookups. Similarly, the resolution code is chosen from a list of values at the time the task is completed at the customer site. The user can enter and/or edit Problem and Resolution summary information at any time.

Update Tasks: Details tab

- Ability to view and add the description associated with the task.
- Ability to view existing notes and create new notes with source Task Manager
- Ability to view planned and scheduled start/end dates
- Ability to view owner and assignee for a task

For a step-by-step procedure for updating task details, see Update Task Detail and Notes, page 8-9 .

Update Tasks: Parts tab

The user can invoke the parts sub tab either by clicking on the Parts icon on the dashboard or by navigating to Update tasks, and clicking the parts sub-tab. The tab will be enabled only if there are any parts associated with the task.

Note: When there are no parts associated with a task, the parts icon and the sub-tab is disabled.

Within the parts tab, a technician can:

- View additional audit information
- Improve Problem History to show history based on customer and product information
- Remove functional gaps with the forms service request module

Update Tasks: Debrief tab

The field service technician has the ability to capture labor time, materials used to perform the job at the customer site, and any expenses incurred on the task assignment. A technician accesses Debrief by either clicking on the Debrief icon on the dashboard or clicking on the Update Tasks icon on the dashboard and then clicking the Debrief tab.

This action brings up the Debrief summary tab, which displays debrief lines that have already been created against the existing task assignment. A technician can create new labor, material, and expense lines by clicking on the appropriate create button.

After the required information is entered on the create screen, the user can either click Apply to commit the record details that were just entered, or click Add button to create additional lines.

After these debrief lines have been created, the user has the option to either update or delete these lines as long as they have are not submitted to charges. This action can be performed by clicking Update or Remove on the Debrief summary tab.

For a step-by-step procedure to add or update a debrief, see Update Debrief, page 8- 9

Update Task Details and Notes

To update task details and all notes to the task use the following procedure.

Prerequisite

None.

Responsibility

Field Service Technician Portal

Navigation

Field Service Technician Portal > Field Technician's Dashboard > Update (icon)

Steps

1. From the dashboard main page, click the Update icon on the task you want to update.
The Update Task window opens to the Details sub-tab.
2. If you want to add or change the description the task, enter text in the Description text box.
3. To add a note, choose a Note Type from the list of values (for example, Callback, General Note, etc.).
4. Choose the Visibility level for the note from the list of values.
Options include: Public, Private, or Publish.
5. Enter the text of the note in the text box.
6. Click Apply to save your work.
7. To view your note or any other notes attached to the task, click the + sign to the left of Notes History.
This expands the note. From here, you can modify the Note Type or Visibility level of the note.

Update Debrief

To update or add a debrief line to the task follow these procedures:

- Add a Labor Line, page 8-10
- Add a Material Line, page 8-10

- Add an Expense Line, page 8-12

For complete details on the entire Field Service Debrief process, see Using Debrief, page 3-1.

Prerequisite

None.

Responsibility

Field Service Technician Portal

Navigation

Field Service Technician Portal > Field Technician's Dashboard > Update Task > Debrief

Add a Labor Line

To add a debrief labor line to a task, follow these steps:

Steps

1. From the Update Task window, click the Debrief link. Alternatively, from the Dashboard main window, you can click the Debrief icon on the task for which you want to add debrief lines.
2. In the Labor section, click Create.
This displays the Create Labor window, which contains all the labor lines, if any, that you've already added to the task.
3. In the New Labor Line section, choose a Service Activity Code for the line from the list of values.
4. Enter the amount of time spent working in the Duration field.
5. Enter the Start and End times for the activity.
6. Optionally, enter an item that the labor line is being logged against, if applicable.
An Item Description defaults.
7. The UOM field defaults to the value associated with the Service Activity that you selected. You can choose a different UOM from the list of values.
8. Optionally, enter a Reason for the labor line.
9. Enter the Service Date for which you performed the labor.
10. Click Add to save the labor line.
11. Click Apply to save your work.

Add a Material Line

The material line section of the Update Tasks Debrief area is divided into two parts: Install and Return.

The Install section is used to capture debrief lines with a line type of "Order" for all transactions where the item is installed at the customer site.

The Return section is used to capture debrief lines with a line type of "Return" for all transactions to be removed from the customer site. If the technician has a default defective sub-inventory assigned to him, the item will default into the sub-inventory field for return transactions.

To add a debrief material line, follow these steps:

Steps

1. From the Update Task window, click the Debrief link. Alternatively, from the Dashboard main window, you can click the Debrief icon on the task for which you want to add debrief lines.
2. In the Material section, click Create.
This displays the Create Material window, including all the material lines, if any, that you've already added to the task.
3. Select a Service Activity from the list of values.
This is the activity you performed for the material you are reporting on. The Item you select is filtered based upon the Service Activity Code you choose.
4. Choose the Item Number.
If the Update IB flag is checked for a service activity code (during item setup), the items' LOV displays both trackable and non-trackable items. Otherwise, it displays only non-trackable items.
5. The UOM defaults from the selected item, but you can select a different UOM from the list of values, if necessary.
6. Enter the amount of the material used at the Quantity field.
In the case of serialized items, Quantity is 1.
7. The LOV for Subinventory is dependent on the line category code defined in the service activity code setup form.
In case the line category code is defined as "Order" the sub inventory gets populated with the default usable sub inventory. The LOV will then display only usable subinventories. In the case where the line category code is "return" the sub inventory gets populated with the default defective sub inventory. However, the LOV for sub inventory will display both usable and defective sub inventories.
8. Enter the Serial Number, Lot, Locator, Revision, and Instance Number details depending on the item attributes.
The LOV for these fields are validated based upon the Item and Subinventory combination.
9. Choose a Service Date from the date list of values.
The system date is defaulted.
10. Optionally, choose a Reason for the material transaction from the list of values.
11. The Disposition field is defaulted once the Item is selected.
12. In case an item is Installed base trackable and the line category code on the service activity code setup form is "Order," the parent product and the recovered product field is enabled.

The parent product LOV displays the list of all the instances installed at the customer location. In case of line category code "Return," the recovered product field is enabled.

13. Enter the return reason for the recovered transaction.
14. Click Apply.

The material line is saved.

Add an Expense Line

To add a debrief expense line, follow these steps:

Steps

1. From the Update Task window, click the Debrief link. Alternatively, from the Dashboard main window, you can click the Debrief icon on the task for which you want to add debrief lines.
2. In the Expense section, click Create.
This displays the Create Expense window, including all the expense lines, if any, that you've already added to the task.
3. Choose a Service Activity Code from the list of values.
This is the activity you are going to perform for the expense you are reporting on.
4. Select the Item for which you are going to create an expense line.
The Item Description field is populated with an extended description for the item. The UOM is defaulted after selection.
5. You can either enter the UOM and Quantity, or the Amount and Currency.
Quantity and Amount are mutually exclusive.
6. The Currency field defaults to the functional currency defined in your set of books, but you can change it, if necessary.
7. Choose a Service Date from the date list of values.
The system date is defaulted.
8. Optionally, choose a Justification for the expense from the list of values.
9. Click Add to temporarily save the expense line to your debrief.
10. Click Apply to save this line to the permanent record.

Create a Follow-Up Task

Field Service technicians can create follow-up tasks from the Update Tasks window. A technician may find it necessary to create a follow-up task in order to complete the work required by the Service Request.

Use the following procedure to create a follow-up task.

Prerequisite

A task must be assigned to the technician.

Responsibility

Field Service Technician Portal

Navigation

Field Service Technician Portal > Field Technician's Dashboard > Update Task

Steps

1. From the Update Task window, click Create Follow-Up Task.
This opens the Create Task window.
2. Enter a Subject for the task.
3. Select the Type of task from the list of values (Diagnostic, Dispatch, Callback, etc.).
4. Enter Planned Start/End times.
5. Choose the Task Assignment status (approved, working, etc.).
6. Choose a Priority level for the task (high, medium, low, etc.).
7. Enter a Planned Effort.
In this field, enter a numeric value in the free text field and then choose a qualifier from the list of values (hours, minutes, days, etc.).
8. Enter a Description of the task.
9. If you want to add a note, choose a Note Type from the list of values.
10. Choose a Visibility level from the list of values.
11. Enter the note in the text box.
12. Click Apply to save the task.

View a Pro Forma Invoice

The ability to invoke a Pro Forma Invoice allows technicians to look at a report that details all the charges entered for the tasks performed at a customer site. The report includes details such as customer's name, bill to address, service request number, item name, qty, and amount. The report can be printed and a hard copy can be sent to the customer.

To access the Pro Forma Invoice follow this procedure.

Prerequisite

Charges must be entered for this report to have significance

Responsibility

Field Service Technician's Portal

Navigation

Field Service Technician Portal > Field Technician's Dashboard > Update Task

Steps

1. From the update tasks UI, expand the Show Service Request section.
2. Click the Pro Forma Invoice button.

The Service Request Charges Report is opened. In the header information, this report displays all the service request information. It also displays a host of charges-related information, such as a summary of the charges and also details of the charges, including Estimate Charges, Submitted Charges, and Unsubmitted Charges.

3. To print this form, use the "print functionality" on your browser.

Capture Travel Information

The Field Service Technician's Portal enables a user to capture travel related information for their individual task assignments. This feature is enabled through the CSF: Capture Travel Information profile option.

This profile can be set with the following values: None, Time, Time and Distance, and Distance. The Update Task UI will display fields relating to the value selected. For example, if the profile option is set to Time, then the UI displays the start and end time fields, but not the distance field.

The fields rendered in this feature are not mandatory. This means, for example, that even though the profile is set to 'Time', the user has the option to skip entering the start and end time even though these fields will be displayed on the UI.

Create Service Request

Field service technicians can create a new service request from the dashboard by accessing the Create Service Request link. A new service request is typically associated with an existing customer where the technician has performed a service.

If the technician determines a need for a new service request, he can locate existing product registration based on serial number, tag number, Instance address, account number, contact name or he can identify the customer to create a service request.

The Create Service Request windows allows you to enter contact information, product information, a problem description, SR issues, incident address, shipping information, contractual coverage, and the bill-to-address.

Note: In order to view and use the Service Request bin, you must set the CSF: HTML Service Implemented profile option to Yes. Also this profile option enables the Service Request hyperlink in the task spread table to be enabled.

For complete information on logging a service request, see the *Oracle Teleservice User Guide*.

Prerequisite

Oracle Teleservice must be installed.

Responsibility

Field Service Technician Portal

Navigation

Field Service Technician Portal > Field Technician's Dashboard

Steps

1. From the Create Service Request block in the dashboard main page, select a Service Identifier from the list of values in the Search Key field.

Some examples of possible identifiers are customer name, instance serial number, service request number, instance service tag, and so on.
2. Enter a Value for the search identifier. If you do not know the complete value, enter a partial value followed by a wildcard character (%) and use the search functionality to locate the value.
3. Click Go.

This opens the Create Service Request window and displays key information such as the service identifier and related values.
4. To create Contact Information, enter values for all the applicable fields in the following list: Contact Type, Name, Contact By, Account, Timezone, and Language. The Current time is defaulted.
5. Click Create Contact to save your work.
6. To log Product Information, enter values for all the applicable fields in the following list: Category, Item Name, Item, Item Instance, Component, and Sub-Component.
7. Click Create Instance to save the product information for the service request.
8. In the Problem Description section, enter a Summary of the service request.
9. Optionally, enter a description.
10. In the Issues section, select a Request Type from the list of values. (For example, Field Service).
11. Choose a Status. (For example, Open, Working, etc.)
12. Choose the Internal Severity Level of the SR.
13. Optionally, you can provide information such as Problem Type, Customer's Urgency, Error Message (text), Helpdesk Number, and Project number. The Incident Date defaults to the current date, but can be changed.
14. Choose the assignment strategy for the SR by selecting the appropriate radio button.

The options are: Automatically Assign, Assign to my Group, Assign to me and my Group.
15. In the Incident Address section, choose where you want to use the Existing Address or a New Address.

The Address field will display the default address, but you can select another one, if applicable.
16. If you are entering a new address, select the appropriate radio button and fill in the following fields: Address, City, State, Zip, and Country.
17. In the Shipping Information section, verify existing values or provide values for the following fields: Customer, Contact, Account, and Address.
18. If there is Contractual Coverage associated with the SR, provide values for the following fields: Contract, Expected Response Date, Expected Resolution Date.
19. In the Bill-To-Address section verify existing values or provide values for the following fields: Customer, Contact, Account, and Address.

20. Click Create Address to save the address to the SR.
21. To create the Service Request, click Apply.

Guidelines

You can update shipping information, the bill-to-address, or the product information. Make the necessary changes and click the appropriate update button.

