

# **Oracle® Wireless Option for Service**

Concepts and Procedures Guide

Release 11*i*

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Oracle Wireless Option for Service Concepts and Procedures Guide, Release 11i

Part No. B12233-01

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## **B Profile Options**



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**Oracle Wireless Option for Service Concepts and Procedures Guide, Release 11*i***

**Part No. B12233-01**

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

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# Preface

Welcome to the Oracle Wireless Option for Service Concepts and Procedures Guide, Release 11*i*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Advanced Scheduler, Field Service, and Spares Management.

If you have never used these applications, Oracle suggests you attend one or more of the Oracle Applications training classes available through Oracle University.

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See for more information about Oracle Applications product information.

## How To Use This Guide

This manual contains the information you need to implement and use the Oracle Wireless Option for Service application.

- Chapter 1 provides an introduction to and an overview of Oracle Wireless Option for Service.
- Chapter 2 provides all the implementation information, including prerequisite steps as well as the implementation methodology for Oracle Wireless Option for Service.
- Chapter 3 discusses using Oracle Wireless Option for Service, including ordering parts, changing task status, logging debriefs, accessing the Oracle Knowledge Base, and accessing your schedule offline.
- Appendix A provides a list of the Oracle Wireless Option for Service voice commands for each of the actions you can perform using a voice-enabled device. This appendix also contains four flow diagrams detailing key business flows and the commands available to perform them.
- Appendix B provides a list of profile options necessary for the successful implementation and operation of Oracle Wireless Option for Service.

## **Documentation Accessibility**

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## Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Wireless Option for Service.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

## Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation** - See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **Release Content Document** - See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on Oracle*MetaLink*.
- **About document** - Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on Oracle*MetaLink*.

## Related Guides

Oracle Wireless Option for Service shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Wireless Option for Service.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

## **Guides Related to All Products**

### **Oracle Applications User's Guide**

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

## **Guides Related to This Product**

### **Oracle Field Service User Guide**

This manual contains detailed information about using the Oracle Field Service application, including the Dispatch Center, Debrief, and Spares Management modules, all of which are tightly integrated with the Oracle Wireless Option for Service application.

### **Oracle Field Service Implementation Guide**

This manual contains detailed information about implementing the Oracle Field Service application, along with all the other Oracle applications that support a successful implementation.

### **Oracle Self-Service Web Applications Implementation Guide**

This manual contains detailed information about the overview and architecture and setup of Oracle Self-Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

### **Oracle Common Application Components User Guide**

Oracle Field Service uses many modules from among the Common Application Components, including Resource and Task Manager, among others. Refer to this guide for details on the usage of each module.

### **Oracle Advanced Scheduler Concepts and Procedures**

When Advanced Scheduler is installed, the usage is tightly integrated with the Field Service application. This guide explains the Advanced Scheduler processes and how it is integrated with Field Service.

### **Oracle Field Service/Laptop Concepts and Procedures**

This guide will help you to navigate the mobile client, the laptop device, and explains how to use the Mobile Field Service/Laptop application. Field Service information is send to the laptop device to be handled by the field service representative.

### **Oracle Field Service/Palm™ Devices Concepts and Procedures**

This guide will help you to navigate the mobile client, the palm device, and explains how to use the Mobile Field Service/Palm™ Devices application. Field Service information is send to the palm device to be handled by the field service representative.

# Installation and System Administration

## **Oracle Applications Concepts**

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

## **Installing Oracle Applications**

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

## **Upgrading Oracle Applications**

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

## **“About” Document**

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on *OracleMetaLink* for most products starting with Release 11.5.8.

## **Maintaining Oracle Applications**

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

## **Oracle Applications System Administrator's Guide**

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

## **Oracle Alert User's Guide**

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

## **Oracle Applications Developer's Guide**

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

## **Oracle Applications User Interface Standards for Forms-Based Products**

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

## **Other Implementation Documentation**

### **Oracle Applications Product Update Notes**

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

### **Oracle Workflow Administrator's Guide**

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

## **Oracle Workflow Developer's Guide**

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

## **Oracle Workflow User's Guide**

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

## **Oracle Workflow API Reference**

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

## **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle Wireless Option for Service implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

## **Oracle eTechnical Reference Manuals**

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on *OracleMetalink*

## **Oracle Applications Message Manual**

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

# Training and Support

## Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Wireless Option for Service and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

## Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Wireless Option for Service working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

## Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

## About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

## Your Feedback

Thank you for using Oracle Wireless Option for Service and this concepts and procedures guide.

Oracle values your comments and feedback. In this guide is a reader's comment form that you can use to explain what you like or dislike about Oracle Wireless Option for Service or this user guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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# Understanding the Wireless Option for Service

Oracle Wireless Option for Service offers complete, automated and streamlined field service solutions to field service representatives by providing real-time wireless access to the enterprise applications. Using any wireless device, the field service representatives can remotely access the latest, most accurate and critical information required to perform their job.

This information enables the field service representatives to meet customer expectations by delivering superior customer service, resolving problems quickly and ensuring consistent service.

The Wireless Option for Service also provides the representatives with a voice-activated application giving them access to the enterprise information using wireless telephones (land line as well as cell phones). The input mode to access the information through this method includes both keypad and speech identification.

## 1.1 Overview of Wireless Option

Field Service Wireless facilitates the communication between the office, dispatchers, and the mobile workforce. Using the wireless Option, the field representatives are in real time contact with their central office.

The dispatchers at all times know the status and actions of all their field representatives. This results in faster resolution time for customer problems as the representatives have access to critical information required to complete their job.

Field Service Wireless leverages the wireless features of web-based Oracle 9i, which provides the most flexible, scalable and reliable mobile infrastructure. Using Oracle's Application Servicer (AS), Field Service Wireless provides browser based

internet access on mobile devices independent from the underlying wireless infrastructure including networks, protocols, devices, markups and gateway.

Oracle Wireless Option for Service manages and delivers content by taking into account the screen size and input methods for the devices. Using the voice capabilities, field representatives can listen to tasks assigned to them and get detailed information, such as what problems have been reported, who is the customer, and when they need to arrive on site. The field engineers can also update the current status of the tasks by using voice commands.

The Wireless Option supports the following technology:

- **Small Form Factor:** This includes any WAP-enabled phones and some smaller RIM pagers.
- **Medium Form Factor:** This includes most Personal Digital Assistants (PDA), such as iPAQ, HP Jornada, Palm, and large RIMs.
- **Voice Enabled Devices:** This includes telephones and cellular phones. DTMF and Speech are supported.

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**Note:** The GUI-based steps included in this guide are based upon the usage of Medium Form Factor devices, which are the primary devices typically used in a Field Service operation.

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The following table provides a list of Wireless Option features and which are supported by each of the three wireless technologies.

<b>Feature</b>	<b>Small Screen</b>	<b>Voice</b>	<b>Medium Screen</b>
View Task Summary	Yes	Yes	Yes
Search Task/SR	Yes	Yes	Yes
Task Detail/Change task assignment status	Yes	Yes	Yes
Service Request Details	Yes	Yes	Yes
Service Request Resolution	Yes	No	Yes
Create Service Request	No	No	Yes
Service History	No	No	Yes
View Contractual Details	Yes	No	Yes
Customer Information	Yes	Yes	Yes

<b>Feature</b>	<b>Small Screen</b>	<b>Voice</b>	<b>Medium Screen</b>
Counter Readings	Yes	Yes+	Yes
Install Base Configuration	No	No	Yes
Labor Debrief	Yes	Yes	Yes
Expense Debrief	Yes	Yes	Yes
Material Debrief	No	No	Yes
Signature Capture	No	No	Yes*
Search Parts	Yes	No	Yes
Transfer Parts	Yes	No	Yes
Order Parts	No	No	Yes
Receive Parts	No	No	Yes
Excess Part Return	No	No	Yes
View Order Status	No	No	Yes
Create/View Notes	No	No	Yes
Follow up Task with Parts Requirement	No	No	Yes
Knowledge Management	No	No	Yes
Offline Schedule	No	No	Yes
Driving Directions	Yes	No	Yes

Please note that the Signature Capture functionality, which is supported by the Medium Form Factor, is only available on Symbol and Pocket PC devices for this release. Also, counter reading functionality is limited when using the Voice technology.

### 1.1.1 Key Benefits

Oracle Wireless Option for Service offers a complete solution to meet the needs of service organizations. Key benefits include the following:

- Allows a field representative access to complete service request and customer and product information.
- Faster response time to last minute schedule changes.
- Instant updating of the enterprise applications with parts, time and expenses.

- Replenish parts based on inventory levels.
- Extends the wireless application to provide voice support capabilities to access enterprise information.
- Reduces operation costs by providing voice support to field service representatives.
- Provides faster billing cycle through remote capturing of counters and on-site invoicing.
- Allows flexibility in choosing devices.
- Dispatcher knows the real time status and action updates of all their field engineers for their jobs.
- Provides secure communication while transmitting the data to and from wireless devices.

### 1.1.2 Key Features in This Release

The following is a list of key new features in the Oracle Wireless Option for Service:

- Integration with Knowledge Management.
- Enables Advanced Parts Search functionality.
- Ability to view offline schedule.
- Enables engineer the ability to create a new service request and associate a task to it.
- Ability to view a list of excess parts.
- Complete view of the installed base configuration of the product against which the service request was logged.
- Ability to capture a customer signature. (This feature is available for Medium Form Factor devices only.)
- Ability to capture labor and expense debrief information via the voice module.
- Ability to provide counter reminder updates upon completing the task assignment.

### 1.1.3 About the Business Process

The field service engineer is equipped with a wireless device, in most cases a Medium Form Factor PDA device.

Oracle Wireless Option for Service is used together with the other wireless products and is not intended to replace these products. It will make the retrieval of task related information easier, because most field engineer representatives carry phones with them. A connection with the wireless network is necessary for the application to operate.

Oracle Wireless Option for Service supports the following business process flow.

1. The call center agent creates a request and an Oracle Field Service task.
2. The planner schedules a task and dispatches it to the most suitable field service engineer.

From this moment the field service engineer can use the Oracle Wireless Option for Service to retrieve and update task and task-related information, to order parts, create new service requests, and to create follow-up tasks.

3. The field service engineer logs into Oracle Wireless Option for Service.
4. The field service engineer retrieves the agenda of the current working day.

If the current day is not applicable, the field service engineer can choose another date of interest. The choice consists of the following items: tomorrow, yesterday, this week or enter date. After the field service engineer selects one of these items, this date becomes the current day.

5. The field service engineer can now do the following:

- View customer information

Field service engineers can inquire on the customer information concerning the selected task. They can also select telephone numbers and use them to call the customer.

- View and update task information

Field service engineers can inquire on the task information concerning the selected task. They can change the resolution and the status of the selected task. They can also report expenses and labor, as well as capture counter readings.

- View service request information

Field service engineers can inquire on the request information concerning the selected task.

- Submit the resolution of the task

Field service engineers can change the resolution of the selected task. The resolution list is extracted from the back office application. The user will be asked to close the task. If so, the status of the task will be set to Closed.

- Submit the change of task assignment status

Field service engineers can change the assignment status of the selected task. The task list is extracted from the back office application. When the assignment status of the task is set to Closed, the screen returns to the agenda.

- Access the Knowledge Base

The technician can access the company information repository for potential solutions to problems experienced in the field.

- Order Parts

- Perform an Advanced Parts Search

The technician can search for parts from his own other subinventories, from co-worker's subinventories, or from a field warehouse.

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## Implementing the Wireless Option

This chapter details the dependencies and steps necessary to perform a successful implementation of Oracle Wireless Option for Service. This process includes installing and configuring the Oracle AS Wireless Edition, the implementation of the necessary Oracle Applications that support the Wireless Option, and, finally, the implementation of the Wireless Option for Service.

Topics covered in this chapter include:

- Section 2.1, "Oracle Wireless Solution for Service Implementation Overview"
- Section 2.2, "Setting Up Oracle AS Wireless Edition"
- Section 2.3, "Wireless Application Implementation Overview"
- Section 2.4, "Implementation Tasks for the Wireless Option"
- Section 2.5, "Verifying the Implementation"
- Section 2.6, "Additional Information to Maintain the Wireless Option"

### 2.1 Oracle Wireless Solution for Service Implementation Overview

Oracle Wireless Option for Service enables field representatives access to mission-critical data by accessing the enterprise database through a wireless device. The field representative can also perform certain tasks using the voice interface when he/she is out of wireless coverage.

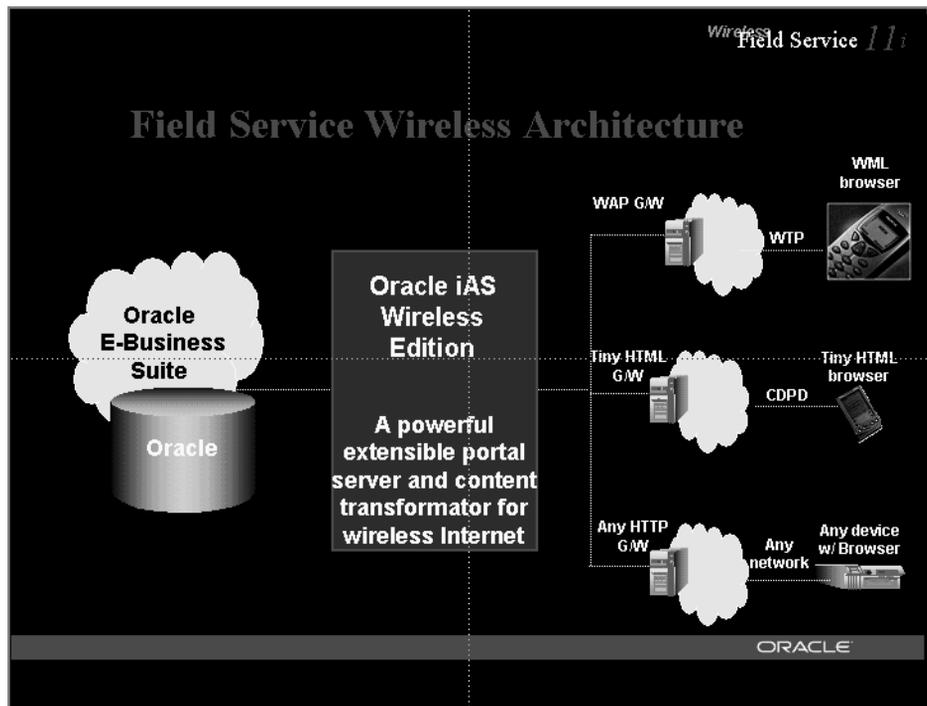
The Oracle Wireless Option is a solution for field service representatives on tethered mobile devices. This means that the device has a continuous connection to the Oracle Enterprise Applications. Field service representatives connect to this application by choosing a URL on their wireless device's web browser. After completing the required login, they can access real-time information from the enterprise database.

With this solution, the field service engineer can carry on his daily tasks using any mobile device with internet capabilities (with a web browser). For the voice interface only a phone is required, which does not have to be a wireless phone.

Oracle Wireless Option for Service can be deployed over any protocols, including WML, HDML, Tiny HTML or Voice XML. This solution works over any wireless standard such as CDMA, CDPD, GSM, GPRS, HSCSD, and TDMA. To make this process possible, data is extracted from Oracle Enterprise Applications as XML data, which the Oracle Application Server then transforms into an appropriate markup language for the device that is connected through the internet/intranet to the AS wireless server.

The following diagram illustrates the basic architecture that underlines the Oracle Wireless Option for Service:

**Figure 2-1 Wireless Solution for Service Architecture**



In this diagram, Oracle applications, supported by an Oracle database, link to small form factor, medium form factor, and voice devices through the Oracle AS Wireless Edition.

### 2.1.1 Technology, Requirements, and Performance

Field Service Wireless enables read and write functions to the enterprise database through a wireless connection between a mobile device, the Internet Service Provider (ISP), and the AS wireless edition.

The following components are involved:

- Enterprise Database: This is the enterprise data that field service engineer will access through a wireless device.
- Enterprise Applications Web Server: This is the http server used to connect to enterprise applications.
- Oracle AS Wireless Edition (ASwe): This server is used to transform XML to any markup language (WML, HDML, Voice XML).
- WEB-enabled wireless device: This device is capable of displaying Web pages in a web-enabled browser.

In this section please refer to the following:

- Architectural Overview
- Minimum Software Requirements
- Minimum Hardware Requirements
- Terminologies

### 2.1.2 Architectural Overview

This section provides an overview of the architectural structure that underpins the functionality of Oracle Wireless Option for Service.

#### **Presentation Layer**

This layer is responsible for look and feel of the application. Java server pages are used to generate Simple Result Mobile XML, a XML language understood by Oracle Application Server, which is transformed into different mark-up languages depending on the wireless device. This data is then sent back to the device in the form of a HTTP response to the original HTTP request made by the device.

## Control Layer

The flow of the application is controlled by a series of Java Server Pages.

## Application Logic

All the Business APIs are written in PL/SQL. They are accessed using Java Beans. If the data can be accessed using database views, no PL/SQL is required and data is fetched directly from the application database using Java Beans.

Following are the steps for the flow of information.

1. The device sends a request to ASWE through the gateway.
2. ASwe sends the request to the Enterprise Application server.
3. A JSP is invoked and the request is processed.
4. The JSP generates the Mobile XML.
5. The Mobile XML forms the response back to the ASwe.
6. ASwe transforms the XML data to appropriate mark up language depending on the device using appropriate style sheets and transformers.
7. The response is sent back to the device for display.

### 2.1.3 Minimum Software Requirements

The following software is required to run the Oracle Wireless Solution for Service application:

- Field Service 11.5.10
- Oracle AS Wireless Edition
  - Release 10g (9.0.4.0.X)

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**Note:** Any required patches for Oracle AS Wireless can be found on [OracleMetaLink](#).

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- Use the Installation Guide for Oracle AS Wireless Edition for additional information and verification.

### 2.1.4 Minimum Hardware Requirements

Please refer to the installation guide of Oracle AS Wireless Edition for details.

### 2.1.4.1 Hosting Option

Telephone companies have a wireless network in place for cell phone users and provide wireless carrier services. The telephone companies also provide end users with a Wireless Portal to access the web and other content. With this alternative, the telephone company completely operates and maintains the gateways and Oracle AS Wireless Edition.

There are also specialized Wireless Portal provider, which can provide individual telephone companies or enterprises hosting services for their gateways and Oracle AS Wireless Edition. These are often referred to as wireless application service providers (WASPs). OracleMobile.com is one such WASP that can host the wireless and voice infrastructure and give value-added services such as consulting and security to corporations and enhance end user experience.

For accessing voice interface this is a preferable option.

### 2.1.4.2 In House Option

Using the in-house option, businesses can run Oracle AS Wireless Edition infrastructure themselves. In this scenario, corporations have to deploy and maintain their own infrastructure. The corporations also need to have their own firewall-based security infrastructure in place.

## 2.1.5 Terminologies

The following terms are used throughout this document:

**WIRELESS\_SERVER:** This is the Web-Server for the AS Wireless Edition (e.g., `http://<Wireless_Server name>:<port number>`).

**ENTERPRISE SERVER:** This is the web server for the Oracle Enterprise Applications (e-Business Applications). Typically, since there are a lot of URLs that access the Enterprise Applications, depending on which applications you are using (`jtflogin.jsp`, `csfwlgnm.jsp`, etc.), this would indicated the common HTML directory.

So, for example, if `http://<Enterprise Host>:<Port Number>/OA_HTML/jtflogin.jsp` is the JTF URL for the Enterprise application, and `http://<Enterprise Host>:<Port Number>1/OA_HTML/csfwlgnm.jsp` is the Oracle Wireless Option for Service application, then ENTERPRISE\_SERVER is `http://<Enterprise Host>:<Port Number>/OA_HTML`, where `<Port Number>` is the non-ssl http port for the web server.

**MIDDLE\_TIER:** This is the wireless option of the ASwe. The middle tier is divided into two installations: infrastructure and server. In this situation, this would refer to the Server Installation where Wireless Option is selected.

**ORACLE\_HOME:** This is where the wireless option of the Oracle ASwe is installed. Please note there might be two ORACLE\_HOMEs (Infrastructure Home and the middle-tier home). In this case, ORACLE\_HOME is used only for the middle-tier home.

**PANAMA\_HOME:** This would be ORACLE\_HOME/wireless.

**OA\_HTML** is the common html directory for all the products in the Oracle Enterprise Application.

**OA\_HTML\_URL** is the URL for the Enterprise Applications (Example: ENTERPRISE\_SERVER).

## 2.2 Setting Up Oracle AS Wireless Edition

The middle tier of the Wireless Option, which serves as the portal between the application server and a technician's wireless device, must be set up and fully configured.

The following section details the procedures to set up Oracle AS Wireless Edition if you are using the "Directions" module:

- Using Release 10g (9.0.4) AS

### 2.2.1 Using Release 10g (9.0.4) AS

You must perform the following tasks to configure the AS Wireless Edition Release 10g (9.0.4) to support the Directions module:

- Set Proxy Settings
- Set Location Services

#### Set Proxy Settings

In order to properly set the proxy settings for the portal server, use the following procedure.

#### Steps

1. Log into Enterprise manager of ASwe using the URL `http://WIRELESS_SERVER:portName` (default 1810).

2. Log into Enterprise Manager as `ias_admin`. After login the screen would have at least two stand alone instances, one being the Infrastructure and the other being the middle tier.
3. Click on the Stand-alone middle tier instance.
4. Navigate to the configuration page by clicking on Wireless > Site Administration.
5. Click on the HTTP or HTTPS configuration. Enter the appropriate values.
6. Save you settings when you are finished.

### **Set Location Services**

Use the following procedure to set the location services for the server. eLocation is the recommended provider. The default username and password for accessing eLocation is "" and "".

#### **Steps**

1. Using the same log in as above, navigate back to Middle tier Instance > Wireless > Site Administration.
2. Click on Location Services under Component Configuration.
3. Set up the Geocoding configurations.
4. Set the Routing Configuration.
5. Set the Map Provider Configuration.
6. When you have completed the Map Provider configuration, restart all the services for the Middle tier.

## **2.2.2 Installation and Dependency Verification**

To verify the installation and dependencies, review the logs of all installations that have errors.

## **2.3 Wireless Application Implementation Overview**

This section provides descriptions of the setup and configuration tasks required to implement the application successfully. This topic group tells how to set up a user for the wireless option.

The topic covered in this section is:

- Section 2.3.1, "Confirming Setup of Oracle Applications"

## 2.3.1 Confirming Setup of Oracle Applications

Before setting up Oracle Wireless Solution for Service, you must install and fully implement these Oracle applications or components:

- Oracle Field Service

This includes all the Oracle applications necessary for a fully operational Field Service application. For more information on the specific steps necessary for Field Service implementation, see the *Oracle Field Service Implementation Guide*.

- Oracle Application Server Wireless Edition

Make sure you set up Oracle Application Server Wireless Edition Release 10g (9.0.4), as described in *Oracle Application Server Wireless Edition Installation Guide*. Ensure that all the steps have been reviewed and completed as necessary.

Optionally, you'll need to implement the following applications or modules to run all the functionality available for Oracle Wireless Option for Service:

- Field Service Spares Management module

This module is necessary if you are using any of the parts order or parts search functionality.

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**Note:** All other Oracle applications necessary for a full installation of Field Service (for example, Oracle Install Base, Oracle Shipping, etc.) are required for the Oracle Wireless Option for Service. See the *Oracle Field Service Implementation Guide* for details.

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- Oracle Knowledge Management

This application is required if you plan to access your organization's Knowledge Base. If you want to use the Wireless Option's category search functionality, you must configure categories according to the *Oracle Knowledge Management User Guide*.

- Oracle Advanced Supply Chain Planning

The Wireless Option interfaces with Spares Management and, through Spares, uses the Available-to-Promise (ATP) functionality in the Advanced Supply Chain Planning application for its parts ordering and parts search functionality.

For information regarding the installation and implementation of these applications and components, see the appropriate documentation for each product.

## 2.4 Implementation Tasks for the Wireless Option

Implementing Oracle Wireless Option for Service depends upon setting several profile options, along with application specific setups.

### 2.4.1 Wireless Implementation Task Sequence

In order to successfully implement the Wireless Option for Service, complete these steps in the order shown in the following table:

Required	Step Title
Yes	Setting up the User with Wireless Responsibility
Yes	Setting up the Profile Options for the Wireless User
Yes	Setting up Default Organization and Subinventory
Optional	Setting Profile Options for Task Summary Display, Date Format
Optional	Setting up the System for Route Directions
Optional	Setting up the Email Server Profile Option
Optional	Setting up the Spares Management Order Parts Profile Option
Yes	Set up Master Service to Point to Field Service for AS (9.0.4)

### 2.4.2 Setting up the User with Wireless Responsibility

Use this procedure to assign wireless responsibility to the applications user. The profile options for the Oracle Wireless Solution for Service user are set up once per user.

#### Prerequisites

The user must be created in the database before you can assign Oracle Wireless Solution for Service responsibility.

## **Responsibility**

System Administrator

## **Navigation**

Security > User > Define

## **Steps**

1. Log in to the Oracle Applications with system administrator responsibility.
2. Navigate to Security > User > Define.
3. Enter a valid username, which is already in the database.
4. On the Responsibilities tab, enter the following new responsibility: Field Service Wireless User, JTF Default User Responsibility, Field Service Representative Responsibility.
5. Choose File > Save.

### **2.4.2.1 Setting up the Profile Options for the Wireless User**

Use this procedure to assign profile options to the wireless applications user.

## **Prerequisites**

The user must be created in the database, and must have Oracle Wireless Solution for Service and Field Service Representative responsibility.

## **Responsibility**

System Administrator

## **Navigation**

Profile > System

## **Steps**

1. Log in to the Oracle applications with system administrator responsibility.
2. Navigate to Profile > System. The Find System Profile Values screen appears.
3. In the Profile field, enter: JTF% and choose Find.
4. Enter values for the profile options shown in this section.

## Options

You can set these options in any sequence.

Option	Description
JTFW_PROFILE_DEFAULT_WIRELESS_RESPONSIBILITY	Stores the default wireless responsibility ID for the user. Set at the User level. The default wireless responsibility is the wireless responsibility with which the user is logged in. Set to 22730 to set the wireless responsibility.
JTF_PROFILE_DEFAULT_APPLICATION	Stores the default application ID for the user. Set at the User level. The default application ID is the application to which the user is directed after login. Set to 513 to set a Field Service application.
JTF_PROFILE_DEFAULT_RESPONSIBILITY	Stores the default responsibility ID for the user. Set at the User level. The default responsibility is the responsibility with which the user is logged in. Set to 21685 for a Field Service representative.

### 2.4.3 Setting up Default Organization and Subinventory

You must set up the default organization and subinventory for the resources that will be using the Wireless Option for Service.

#### Prerequisites

The user must be created and must have Field Service Wireless, and Field Service Representative responsibility.

#### Steps

1. Log in to the Oracle applications with system Field Service Dispatcher responsibility.
2. Navigate to Spares > Setup > Resource Address and sub inventories. The screen appears with the list of sub inventories assigned to the resource.
3. Make any of the assigned subinventories to be the default IN sub inventory.
4. Save the settings.

## 2.4.4 Setting Profile Options for Task Summary Display, Date Format

Use this procedure to optionally set up the profile options for the task summary display screen, date format.

The profile options for the Task Summary Display Screen, and Date Format are set up at the system level but they can be overridden at user level.

### Prerequisites

The user must be created in the database, and must have Oracle Wireless Solution for Service responsibility.

### Responsibility

System Administrator

### Navigation

Profile > System

### Steps

1. Log in to the Oracle applications with system administrator responsibility.
2. Navigate to Profile > System. The Find System Profile Values screen appears.
3. In the Profile field, enter: CSFW% and choose Find.
4. Enter values for the profile options shown in this section.

### Options

You can set these options in any sequence.

Option	Description
CSFW: DATE FORMAT	<p>Stores the date format mask. This option can be set at the site level but can be overwritten by the user. Valid date formats are:</p> <ul style="list-style-type: none"> <li>■ DD/MM/YYYY</li> <li>■ DD-MM-YYYY</li> <li>■ MM/DD/YYYY</li> <li>■ MM-DD-YYYY</li> <li>■ YYYY/MM/DD</li> <li>■ YYYY-MM-DD</li> <li>■ DD/MM/YY</li> <li>■ DD-MM-YY</li> <li>■ MM/DD/YY</li> <li>■ MM-DD-YY</li> <li>■ YY/MM/DD</li> <li>■ YY-MM-DD</li> </ul>
CSFW: TASK DISPLAY1	<p>This profile is used together with CSFW: TASK DISPLAY2 and CSFW: TASK DISPLAY3 to display any three values on the Task Summary screen. The options chosen here determine what the field service engineers see when they start the Oracle Wireless Solution for Service application. The options to choose from are:</p> <ul style="list-style-type: none"> <li>■ TASK NUMBER</li> <li>■ SCHEDULE START TIME</li> <li>■ CUSTOMER ADDRESS</li> <li>■ STATUS</li> <li>■ TASK TYPE</li> </ul>

Option	Description
CSFW: TASK DISPLAY2	<p>This profile is used together with CSFW: TASK DISPLAY1 and CSFW: TASK DISPLAY3 to display any three values on the Task Summary screen. The options chosen here determine what the field service engineers see when they start the Oracle Wireless Solution for Service application. The options to choose from are:</p> <ul style="list-style-type: none"> <li>■ TASK NUMBER</li> <li>■ SCHEDULE START TIME</li> <li>■ CUSTOMER ADDRESS</li> <li>■ STATUS</li> <li>■ TASK TYPE</li> </ul>
CSFW: TASK DISPLAY3	<p>This profile is used together with CSFW: TASK DISPLAY1 and CSFW: TASK DISPLAY2 to display any three values on the Task Summary screen. The options chosen here determine what the field service engineers see when they start the Oracle Wireless Solution for Service application. The options to choose from are:</p> <ul style="list-style-type: none"> <li>■ TASK NUMBER</li> <li>■ SCHEDULE START TIME</li> <li>■ CUSTOMER ADDRESS</li> <li>■ STATUS</li> <li>■ TASK TYPE</li> </ul>
CSFW: Default Distance Unit	<p>This is the distance unit for measurement purposes in Wireless. Available values are:</p> <ul style="list-style-type: none"> <li>■ Mile</li> <li>■ Kilometer</li> </ul>
CSFW: Home Page	<p>This profile option applies to the PDA application. For WML application home page always remains as the Main Menu and for the voice application the home page always remains Today's Task Page. However, for PDA application, the user does have an option to pick from Main Menu, Today's Task, or Open Tasks as the default Home Page.</p>

Option	Description
CSFW: Audio Path	This profile option is used only for Voice application. This is a site level profile option, which tells the URL where the audio files are located. For example if the csfwTaskNumber_en_US.wav file is accessible through HTTP protocols at <a href="http://ap103jvm.us.oracle.com:13351/OA_MEDIA/csfwTaskNumber_en_US.wav">http://ap103jvm.us.oracle.com:13351/OA_MEDIA/csfwTaskNumber_en_US.wav</a> , this profile option would be <a href="http://ap103jvm.us.oracle.com:13351/OA_MEDIA">http://ap103jvm.us.oracle.com:13351/OA_MEDIA</a>
CSFW: Task Max	This is a numeric value that determines that maximum number of tasks to display on a screen.
CSFW: Planned Task Window	Follow-up Task functionality requires the entry of Planned Start Date and Planned End Date. The Planned Start Date defaults to system time. This profile determines the Planned End Date. When the profile is not set, the Planned End Date does not default. The profile can be set in number of days. For example, if current date and time are 11-27-2004 (MM-DD-YYYY) and 10:00, and the profile is set to 2.25, the Planned End Date and Time will default to 11-29-2004, 16:00.
CSFW: Service History Days	This profile determines how far back the Service History of an item belonging to a service request should be shown.
CSFW: Voice Expense Activity Code	If this profile is set, the selected expense activity code is used for all Voice Expense Debrief lines.
CSFW: Voice Expense Item	If this profile is set, the selected expense item is used for all Voice Expense Debrief lines.
CSFW: Voice Labor Activity Code	If this profile is set, the selected labor activity code is used for all Voice Labor Debrief lines.
CSFW: Voice Labor Item	If this profile is set, the selected labor item is used for all Voice Labor Debrief lines.

## 2.4.5 Setting up the System for Route Directions

Use this procedure to set up the profile options so that the Oracle Wireless Solution for Service user can access route directions.

The route directions are set up only once for the system.

## Prerequisites

None.

## Steps

1. Perform the following steps to copy the file `csfwTextRouter.jsp`:
  - a. The file is located at `OA_HTML` directory.
  - b. Copy the file `csfwTextRouter.jsp` to the following location:
 

```
ORACLE_HOME/j2ee/OC4J_
Wireless/applications/location/location-web
```
2. Set the "CSFW: Router Location" profile option to:
 

```
WIRELESS_SERVER/location
```
3. Set "CSFW: Return Location" profile option to the Oracle Enterprise Application server where all the jsp files reside (`OA_HTML_URL`).

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**Note:** If the protocols are not supplied, then the system assumes that it is `http`. If you are using `https` protocols, then also use the protocols in step 2 and 3.

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4. Bounce the Apache server that points to `ASwe`.

The following table summarizes the implementation of driving directions:

Task	IAS Release 10g (9.0.4)
Copy the file from	<code>\$OA_HTML</code>
Copy the file to	<code>\$ORACLE_HOME/j2ee/OC4J_ Wireless/applications/location/location-web</code>
After copying the files can be viewed at	<code>http:// WIRELESS_ SERVER:port/location/csfwTextRouter.jsp</code>
CSFW: Router Location	<code>Protocol:/ WIRELESS_SERVER :port/location</code>
CSFW: Return Location	<code>OA_HTML_URL</code>

## 2.4.6 Setting up the Email Server Profile Option

Use this procedure to set up the profile option for the Email server.

The Email server is set up only once for the system.

### Prerequisites

None.

### Responsibility

System Administrator

### Navigation

Profile > System

### Steps

1. Log in to the Oracle applications with the system administrator responsibility.
2. Navigate to Profile > System.  
The Find System Profile Values screen appears.
3. In the Profile field, enter: JTFW% and choose Find.
4. Enter values for the profile option shown in this section.

### Option

Option	Description
JTFW: SMTP SERVER	Set this profile option to your SMTP server.

5. Save your work.

## 2.4.7 Setting up the Spares Management Order Parts Profile Option

If you plan to use the Spares Management order parts functionality you must set the following profile option: CSP: Order Type.

Use this procedure to set up the profile option:

### Prerequisites

None.

### Responsibility

System Administrator

### Navigation

Profile > System

### Steps

1. Log in to the Oracle applications with the system administrator responsibility.
2. Navigate to Profile > System.  
The Find System Profile Values screen appears.
3. In the Profile field, enter: CSP% and choose Find.
4. Enter values for the profile option shown in this section.

### Option

Option	Description
CSP: Order Type	This profile option is used to provide a default value for order type when creating internal orders. Choose from any valid order type in the list of values.

5. Save your work.

## 2.4.8 Set up Master Service to Point to Field Service for AS (9.0.4)

The following procedure enables you to set up the master service to point to the Oracle Wireless Solution for Service.

### Prerequisites

None.

### Steps

1. All users should register themselves in the Application Server, or you can create a common user for the all the users.

Note that while using the common users the voice functionality will not work, as the voice URL does need the username and password for Oracle Applications to be provided at the URL.

2. Login to the Web Tool at `http://WIRELESS_SERVER:httpPort/webtool/login.uix` with username, orcladmin.
3. Click on Services and then click Create Application and make the following selections:
  - Select MultiChannel Application (the default), and click Create
  - Enter the Name as "Field Service Wireless"
  - For small and medium devices, set the URL to `http://ENTERPRISE_SERVER:port/OA_HTML/csfwlgnm.jsp`. For a voice device, provide the username and password of the user in the URL in the following configuration: `http://ENTERPRISE_SERVER:port/OA_HTML/csfwvoice.jsp?username=xxx&password=yyy`
  - Click Finish
4. Select the Content tab and then click Add Application Link and make the following selections:
  - Click Master
  - Select "Field Service Wireless," which was created in step three
  - In the Content App field, type "Field Service Wireless"
  - Click Finish
5. Click the Content tab again, choose Access Control Content and make the following selections:
  - Select the user for which you want the application to have access
  - Select Guests if you want it to appear on the wireless portal (recommended). Click Assign application
  - Select application "Field Service Wireless" and Add to Group
  - Click Finish.

## 2.5 Verifying the Implementation

To verify a successful implementation of the Wireless Option for Service you should perform several tasks. Tasks covered in this section include:

- Section 2.5.1, "Verify User Login"
- Section 2.5.2, "Verify Task Detail Information Card"
- Section 2.5.3, "Verify Directions"

## 2.5.1 Verify User Login

When you have installed the Oracle Wireless Solution for Service, you can verify the user login as follows:

1. Type in the URL for the Portal to Go Server (Oracle AS Wireless Server) and click on the Field Service URL Adapter Service.
2. Type in the applications login and password and verify that you can see the menu.

## 2.5.2 Verify Task Detail Information Card

To verify the task detail information card, perform these steps:

1. Create a service request using the Field Service Core Application and assign a task to a Field Service wireless user for today.
2. Log in to the Wireless application and check whether the task is properly assigned to the wireless user.
3. Click on Today's Task and verify the display of the summary screen in accordance with the profile setting for TASK DISPLAY.
4. Click on Customer Information and verify that you can send an e-mail, assuming that an SMTP server is available.

## 2.5.3 Verify Directions

If Directions are implemented, you can verify that the function works correctly as follows:

1. Log in to the Applications and click on Direction.
2. Click on Other and type in a starting and ending address that you know are correct.
3. Verify the Directions text.

## 2.6 Additional Information to Maintain the Wireless Option

The following table contains information useful in the maintenance and use of the Oracle Wireless Option for Service.

This section also details the following procedures:

- Section 2.6.1, "Setting up Signature Capture"
- Section 2.6.2, "Setting up Optional Voice Files (.wav)"

<b>Features</b>	<b>ASwe - Release 10g (Version 9.0.4)</b>
Creating Users	The users register them selves in: <ul style="list-style-type: none"> <li>■ <a href="http://WIRELESS_SERVER:httpPort/studio/home.jsp">http:// WIRELESS_SERVER:httpPort/studio/home.jsp</a></li> </ul>
Creating Services	The users must login to the studio and create their own applications where he is supposed to type in the URL. In case the administrator wants to use the Service designer for some reason, it would be available at <a href="http://WIRELESS_SERVER:7778/webtools/login.uix">http://WIRELESS_SERVER:7778/webtools/login.uix</a> , where 7778 is the middle tier apache port (Non-ssl). The login would be orcladmin or anything that was used at the time of the installation and the password.
Login through Wireless Device	The users should login to: <a href="http://WIRELESS_SERVER:httpPort/location/rm">http://WIRELESS_SERVER:httpPort/location/rm</a> .
Starting and stopping the Middle tier	Please log into Enterprise Manager at <a href="http://WIRELESS_SERVER:1810">http://WIRELESS_SERVER:1810</a> . Click on the Middle tier stand-alone instance. Startall would start all and stop all would stop all would stop everything. Please note that the same thing can be achieved by going to \$ORACLE_HOME/opmn/bin directory and using the following commands: opmnctl startall and opmnctl stopall.
Viewing Log File	Log into Enterprise Manager at <a href="http://WIRELESS_SERVER:1810">http://WIRELESS_SERVER:1810</a> . Click on the Middle tier and stand-alone instance. Click on Wireless. Click on Log File to see details of error when user encounters "Service Error" on the device. The log file is also available at <a href="ORACLE_HOME/wireless/log/log.xml">ORACLE_HOME/wireless/log/log.xml</a> .

## 2.6.1 Setting up Signature Capture

In order to use the Oracle Wireless Option for Service signature capture functionality, you must use one of the following two wireless devices along with the appropriate system requirements:

Device	System Requirements	Plug-in Required
Symbol	Symbol Spectrum 24R WebClient for Palm Computing Platform	No
Pocket PC-based devices	Pocket PC, Pocket PC2000, Pocket PC 2002, Pocket PC 2003 and 4.0 .Net based devices	Yes

On devices with built-in signature capabilities (Symbol Spectrum24R WebClient for Palm Computing Platform), the Wireless Solution for Service automatically generates the appropriate markup language.

In the case of PocketPC devices running WinCE .0 or later (Pocket PC, Pocket PC2000, Pocket PC 2002, Pocket PC 2003 and 4.0 .Net based devices), a signature capture plug-in is available for download at:

<http://otn.oracle.com/tech/wireless/mobilebrowser.htm>

If you are using signature capture with either of the devices supported by Oracle, you must set the CSFW: Enable Signature Capture profile option to 'yes.'

## 2.6.2 Setting up Optional Voice Files (.wav)

The voice application works with the Text-To-Speech (TTS) server. So all the data from the Enterprise database is read out using the TTS server. However, better quality of the voice application can be done using the voice wav files for the static prompts and messages.

The default wav files are shipped for language code en (English) and territory code (US). So the file naming convention is filename\_en\_US.wav (e.g., csfwTaskNumber\_en\_US.wav). The language code and the territory code are taken from the Enterprise database for the user. So if the user has different territory code or language code then the TTS server would be used instead of the wav files since the files are not shipped. However, these files in the different language can be recorded and copied to the same location where the \_en\_US files are, then the wav files are picked at the execution time. For a user, language code is mandatory and the territory code is not. So if the territory code is not there in the database, then the file name becomes filename\_TERRITORYCODE.wav (e.g., csfwTaskNumber\_en.wav).

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## Using Oracle Wireless Option for Service

Oracle Wireless Option for Service enables a field service technician access to most of the essential information necessary to perform his job at a customer's site.

Not only can a technician view his daily schedule of tasks, he can also perform many other functions during his work shift, such as ordering parts, creating follow-up tasks, creating service requests, and accessing his business's existing knowledge base for potential solutions to common customer issues. The Oracle Wireless Option for Service also allows a technician to access his daily list of tasks even when he is not in the network service area.

Optionally, you can use the Wireless Option to get directions to the job site quickly and easily.

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**Note:** The steps and procedures documented in this chapter are based upon the use of a Medium Form Factor device, such as a PDA. For a complete comparative list of the functionality available for Medium Form Factor, Small Form Factor (WAP) and Voice-enabled devices, see the Appendix.

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The following topics are covered in this chapter:

- Section 3.1, "Getting Started"
- Section 3.2, "Viewing, Managing, and Updating Your Tasks"
- Section 3.3, "Ordering Parts"
- Section 3.4, "Performing Advanced Parts Search"
- Section 3.5, "Accessing the Knowledge Base"
- Section 3.6, "Saving and Viewing Offline Schedule"

- Section 3.7, "View Excess Parts List"
- Section 3.8, "Managing Receipt of Parts"

In order to use the Order Part and Parts Search functionality, you must have the Spares Management module of Field Service enabled. You can get detailed information about the Spares Management functionality in the *Oracle Field Service User Guide*. To use the Knowledge Base integration, you must have the Knowledge Management application installed. For detailed information on Knowledge Base functionality, see the *Oracle Knowledge Management User Guide*.

## 3.1 Getting Started

In order to use Wireless Option for Service, you must have a secure connection to the Oracle Application Server (AS) that your business uses to provide the connection between the application server network and your wireless device. Once the technician has logged into the AS server, he must log into the application with the username and password that was created for him during setup.

Once logged in, the technician will see the main menu, which includes a list of hypertext links that provide access to the available functionality. This list includes the following link:

- Today's Task
- Task Search
- Offline Schedule
- Knowledge Base
- Part Search
- Order Part
- Orders - In
- Orders - Out
- Excess Return
- Create Service Request
- Receive Parts
- Get Directions
- About Field Service

There is also a Logout button at the bottom of the page, which will return the user to the Oracle Application Login page.

To navigate through the UI, the user uses standard point-and-click functionality. The Wireless Option for Services uses standard Oracle HTML functionality, whereby buttons and links are enabled, fields can be entered, and lookups can be used to select values for those fields that are LOV-enabled.

When a user logs into the Wireless Option for Service, the home page main menu may also display the following notification message: "Your schedule has been updated. Please save offline schedule." This message occurs anytime there is a task assignment status change or time change to an assigned Service Request, or if a new task has been assigned to the technician. The message is a hypertext link and, by clicking it, the user can view his updated daily schedule.

Even if a user is working offline, the Wireless Option updates his daily task schedule. The next time the user connects to the network through the wireless device, the notification will appear indicating a change. The user can then view the change and save it as an updated offline schedule.

When you save a task list as an offline schedule, the task information is stored as a static HTML page and contains no active links or buttons. It is for view-only purposes.

## 3.2 Viewing, Managing, and Updating Your Tasks

The Wireless Option for Service provides field service technicians a link to critical information needed to perform their duties at a customer site. Typically, field service technicians are assigned one or more tasks to perform. Wireless allows technicians to quickly view those tasks they're scheduled to perform today and also allows them to search for all tasks, or tasks that are assigned for a different day.

When viewing Today's Task or any other list of tasks returned from a Task Search, the information displayed depends upon the settings entered in the CSFW: Task Display 1 and CSFW: Task Display 2 profile options.

For example, you may want to display the Scheduled Start Time and the Customer Address in the search results. The possible attributes you can display are the following: Customer address, scheduled start time, and task number.

For more information on setting up your home page, see Section 2.4.4, "Setting Profile Options for Task Summary Display, Date Format". For more information on setting all Wireless profile options, see Section B, "Profile Options".

The following task-related procedures are available to a field service technician through the Wireless Option for Service:

- Section 3.2.1, "View Today's Task"
- Section 3.2.2, "Perform a Task Search"
- Section 3.2.3, "Update an Existing Task"
- Section 3.2.4, "Create a Follow-Up Task"
- Section 3.2.5, "View Install Base Product Configuration"
- Section 3.2.6, "Create a Service Request"

### 3.2.1 View Today's Task

Use this procedure to view the current day's task information.

#### **Prerequisites**

A task must be assigned to the resource.

#### **Responsibility**

Field Service Wireless

#### **Navigation**

Main Menu > Today's Tasks

#### **Steps**

1. From the main menu, click the Today's Task hypertext link.

A screen labeled with the current date opens and displays a list of all the tasks scheduled to be addressed by the technician that day. The tasks are displayed based upon the set up in the Task Display profile option and appear as hypertext links.

2. For task details, click the link of the task you want to see.

A screen opens displaying the task number and some of the task details, such as task assignment status, customer name, service request number, task name, priority, scheduled start, planned effort and notes.

If there is a Parts Requirement associated with the task, this field is displayed as well. You can click the hypertext link to see the Parts Requirement details.

3. If you want to change the task assignment status, in the Status field, choose the status you want to assign to the task (Working, Canceled, etc.) from the drop-down list and click Done to save the new assignment status.
4. To see additional customer information, click the hypertext Customer Name.  
This action will display detailed customer information, which was entered on the service request. If the customer contact has an email address, you can click the email address and enter a Subject and Message. To send the message click Done.
5. To see additional information about the service request, click the hypertext service request number.  
This action displays service request information such as customer name, summary of the service request, any notes attached, and also allows you to access any Knowledge Base solutions that might be attached to the service request. For more information on using the Knowledge Base, see Section 3.5, "Accessing the Knowledge Base".
6. If you want to add a note to the task, click the Add notes hypertext link. You can also view existing notes, if any, by clicking the relevant hypertext link.

### **Guidelines**

From the task details page of any task list in Today's Task, you can perform a variety of updates, such as adding debrief information, ordering parts, creating follow up tasks, and so on, by using the drop-down menu that is displayed with the task details. For more information, see Section 3.2.3, "Update an Existing Task".

## **3.2.2 Perform a Task Search**

Use this procedure to perform a task search.

### **Prerequisites**

A task must be assigned to the resource.

### **Responsibility**

Field Service Wireless

### **Navigation**

Main Menu > Task Search

## Steps

1. From the main menu, click the Task Search hypertext link.

The Task Search screen appears. You can filter your search for a task by using any of the following criteria, which appear on the page:

- Task Number, Request Number, Status, Priority, Date, Customer Name, Account Number, Serial Number, or Tag

2. Choose an Assignment Source for your search.

The two options are "Assigned to you" (default) or "Created by you."

3. Click OK to perform the search.

If you want to see all tasks, simply click OK and do not enter any search criteria.

The Search Results screen displays a list of all the tasks that met the search requirement. These results are displayed as information defined in the CSFW: Task Display 1 and 2 profile options.

4. Click the hypertext link of the Task in which you want to view the details.

The Task Details page is rendered. From this screen you can view and update various task details just as you can while viewing task details from the Today's Task menu option.

### 3.2.3 Update an Existing Task

You can update key aspects of an existing task that has been assigned to you through the Oracle Wireless Option for Service. Existing tasks can be accessed through the Today's Task entry point, or by using the Task Search functionality.

There are several updates you can make to an existing task, including updating the task assignment status, adding notes to the task, adding debrief lines, ordering parts, performing a parts search and making a parts transfer or an internal order.

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**Note:** When adding notes to either a task or a service request, the note type options are determined during the setup process in CRM Foundation. Those note types related to a task are mapped to the Task Manager, which can only be viewed when adding a note to a task, and notes related to the service request are mapped to the service request, and can only be viewed when adding a note to a service request.

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Once you have retrieved a task's details, use the following procedure to update the task assignment status and to add notes.

The following topics are also covered in this section:

- Section 3.2.3.1, "Recording Counter Readings"
- Section 3.2.3.2, "Adding Debrief Lines to a Task"

### **Prerequisites**

A task must be assigned to the resource. If you are using Parts Search functionality, you must have the Spares Management functionality implemented.

### **Responsibility**

Field Service Wireless

### **Navigation**

Main Menu > Task Search > Task Details

Main Menu > Today's Task > Task Details

### **Steps**

1. To update the task assignment status, from the Task Details page, select the status you want to assign to the task from the drop-down list.

The available status values include Completed, Accepted, Rejected, Working, Cancelled, and so on.

2. Click Save to save the new task assignment status.

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**Note:** If a task is assigned to a service request that has products associated with it that include counter readings, upon changing the task assignment status to "Completed" a notification is generated asking the user if he wants to "Capture Reading for the Following Counters?" and lists the products. See the Guidelines below for details

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3. To add a note, click the Add hypertext link in the Notes field.

The Add Note screen opens.

4. Choose the Type of note you are adding (for example, Callback, Conversation, Date Change, and so on) from the drop-down list.
5. Choose a note Status from the drop-down list. Possible values include: Public, Private, and Publish.
6. Enter the text of the note in the Descriptions text box.
7. When you have finished with the note, click OK.

Once the note is added, the Task Details page is opened again. In the Notes field, you can now look at the note you added by clicking the View hypertext link. Furthermore, all notes attached to a task can be viewed and multiple notes are designated by a numerical value next to the View link. For example, if there are two notes attached to a task, you will see "(1)View" in the Notes field.

8. To view an existing note click the View hypertext link.

The Task Manager: Notes screen opens and displays a list of the notes associated with the task. This hypertext link displays the date and time when the note was created, the name of the resource who created the note, and the first few words of the note description. You can also create a new note for the task by clicking the New Note button.

9. Click the hypertext link of the note you want to view.

The note details are displayed.

### **Guidelines**

If there are products requiring counter readings associated to the service request for which a task assignment is being completed, then the Wireless Option will alert the technician with the following message: "Capture readings for following counters?" The products are listed as a hypertext link. To capture the counter readings, click the hypertext link and enter the counter reading details.

#### **3.2.3.1 Recording Counter Readings**

A technician can record counter readings during a service call if the task assignment he is working on is associated with a service request on a product requiring counter readings.

Use this procedure the record counter readings.

### **Navigation**

Main Menu > Task Search > Task Details

Main Menu > Today's Task > Task Details

### Steps

1. From the Task Details page, choose Counters from the drop-down menu.  
The Counter details screen opens and includes the product name and also displays the Current Reading.
2. In the New Reading field, record the counter reading for the product.
3. If you want to enable the Reset Flag, choose the Yes radio Button. No is the default.
4. Optionally, enter a Reset Reason.
5. Optionally, enter a Reading Before Reset value.
6. Optionally, enter a Reading After Reset Value.
7. Click Done when you have finished recording the counter readings.

### 3.2.3.2 Adding Debrief Lines to a Task

When a field service technician works on a task, he has the ability create a debrief for that task after he has completed part or all of the task duties. The Wireless Option for Service leverages Oracle Field Service's Debrief module for this purpose. A technician can add labor, material and expense lines to the task. Each of these debrief lines contains a list of fields that must be entered when adding that particular line to the task. The following details the required fields for each line:

- Expense - Service Activity Code, Item, Amount, and Currency
- Labor - Service Activity Code, Item (optional), Start Date, Start Time, End Date and End Time.

In the Wireless Option, you can set a profile option "CSF: Allow Overlapping Times" to determine whether or not you want to allow a technician to enter overlapping times for different task assignments for any given day. If this profile is set to "No," then you will not be allowed to make such an entry and an error message will appear.

- Material - Service Activity Code, Item, Sub Inventory, and Service Date.

The Material line is a two-step process in which the second step renders fields dynamically, depending up the selection you make in the first step. Other Material line fields include: Disposition, Quantity, UOM, Reason, Instance number, Parent Product, Recovered Product, and Part Status.

Wireless Option for Service also supports loaner transactions, whereby the field technician is installing a part at the customer site, which will serve as a temporary replacement part while the original is fixed. In this case, you will need to set up Service Activity Codes for material items of type "loaner." For material line transactions involving loaners, you must enter a Return Date for the part on the material line.

### **Capturing Customer Signature**

The Wireless Option for Service allows you to capture a customer signature during the Debrief process, provided that you are using one of the medium form devices that is supported by Oracle. Once a signature is captured during debrief, it is sent to the Field Service Debrief application, where it can be viewed as an attachment. A service manager can tell a signature has been captured because the attachment icon in core Debrief is enabled for that task.

The following table provides a list of the wireless devices that currently support Oracle's capture customer signature functionality:

<b>PDA Device Name</b>	<b>Specifications</b>
Palm Devices with Symbol Client (i.e. SPT-17xx, SPT-18xx)	Web client browser is required on the device to support signature capture.
Pocket PC 2002 or higher	Requires Pocket IE browser.

For complete details on using Oracle Field Service Debrief, see the *Oracle Field Service User Guide*.

Use the following procedure to add debrief lines to the task.

### **Steps**

1. Navigate to the task details page of the task you want to update.

You can locate the task either through the Task Search function, or by using Today's Task functionality.

2. Select Debrief from the drop-down list and click Go.

The Debrief summary screen opens. This will display the Customer Name and Debrief Number.

3. Optionally, if the Service Request has been resolved, choose a Resolution Code from the drop-down menu and click Save.

Resolution codes are set up in Oracle Teleservice and are user definable to meet your business needs.

4. If you want to add a summary of your work, enter some free text in the Resolution Summary text box.

This information is reflected back on the Service Request form in Oracle Teleservice and is displayed in the Resolution Summary section.

5. In the Debrief Details section, under the Edit Line Types section, there are hypertext links for Expense, Labor, and Material lines. To the right of each of these lines, there is an Add hypertext link. Click Add on the line you want add to the debrief.

The Details screen appears. This screen will display the relevant fields associated with each of the Debrief lines.

6. Fill in the fields with your debrief information for the line you selected.

These fields will render dynamically, based upon the Debrief line selection that you make (i.e. Expense, Labor, or Material).

7. If you are entering Material line information, Step 5 is the first of two steps. When complete, click Next.

8. Enter the rest of the Material line details and click Submit.

Fields include Quantity, UOM Locator, and reason. If you entered a loaner item, you will need to enter a Return Date for the loaned out item as well.

9. Alternatively, if entering Expense or Labor lines, click Done when you have filled in the details of the debrief line in Step 5.

### **Guidelines**

When you have added a debrief line, the hypertext name of the line (Expense, Labor, or Material) displays a numeric value next to it which indicates how many lines of that particular designation have been added.

For example, if you have added two expense lines, the hypertext link would read "Expense(2)." Clicking on that link opens the Expense Lines screen and displays some basic details of both the expense lines you added. You can click on either of the expense lines to open the Debrief Details screen and view or edit the line. You can also add another Expense line from the Expense Lines screen by clicking the Add Expense button. This process applies to Labor and Material lines as well.

### 3.2.4 Create a Follow-Up Task

Often times, a field service technician will recognize a need for follow-up work when completing a particular task at a customer site. For a variety of reasons, such as time constraints, parts availability, or lacking the technical expertise to address the task immediately, the technician might not be able to complete the work himself.

In these cases, a technician can create a follow up task through the Wireless Option for Service. When a technician creates a follow-up task, it is not assigned until either a dispatcher manually assigns the task or it is assigned automatically through Oracle Advanced Scheduler.

The task is automatically associated with the customer that the original task was assigned to and the Service Request number is defaulted from the original service request as well. If there is a Parts Requirement associated with the original task, and you want to create an identical parts requirement, you can copy the parts requirement from the original task when you create your follow-up task.

If there is a skills requirement associated with the original task, it will be automatically copied over to the follow-up task. For detailed information on skills requirements, see the Dispatch Center section of the *Oracle Field Service User Guide*.

The status of the task assignment is defaulted from the CSF: Default "In Planning" task assignment status profile option, which you set during the implementation of Oracle Field Service.

Use the following procedure to create a follow-up task.

#### **Prerequisites**

A task must be assigned to the resource.

#### **Responsibility**

Field Service Wireless

#### **Navigation**

Main Menu > Task Search > Task Details

Main Menu > Today's Task > Task Details

#### **Steps**

1. Navigate to the task details page of the task you are working on.

You can locate the task either through the Task Search function, or by using Today's Task functionality.

2. From the drop-down list at the bottom of the details page, select Follow Up Task and click Go.

The Follow Up Task screen appears with the Customer name and Request Number defaulted from the original task. The Status of the task is defaulted as well.

3. In the Priority field, enter the task priority.
4. Choose a Planned Start Date for the task.  
You can perform this step by clicking Pick.
5. Enter a Planned Start Time.
6. Choose a Planned End Date.
7. Enter a Planned End Time.
8. Enter the Planned Effort for the task.
9. If you want to copy the parts requirement from the original task, select the Yes radio button at the Copy Requirements field.
10. If you have any notes to add, enter them in the Notes field.
11. Click OK to create the task.

### **Guidelines**

You can also add a parts requirement after the follow-up task has been created. Click Add Requirement to navigate to the Add New Requirement Line screen and enter in the appropriate information.

## **3.2.5 View Install Base Product Configuration**

Oracle Wireless Option for Service integrates with Oracle Install Base to provide the installed base configuration for an instance, against which a service request was initially logged.

Install Base is designed to track serialized and non-serialized item instances for products, providing for:

- Instance Maintenance
- Instance-to-Instance relationships

- History of all changes

The Wireless Option will allow a technician to view all the parent-child relationships related to a particular installed instance of an item. If, for example, a product (say a computer system) is installed at a customer site, and it was comprised of several other related components (monitor, hard drive, modem, etc.), then the install base view will allow a technician to see the relationship between all these components.

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**Note:** Only those items that have an instance associated with it in Install Base will be viewable in the Wireless Option.

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For more information, see the *Oracle Install Base User Guide*.

Use this procedure to view the Install Base configuration of an item associated with a service request.

### **Prerequisites**

A service request must have a product with an instance associated with it in Install Base.

### **Responsibility**

Field Service Wireless

### **Navigation**

Main Menu > Task Search > Task Details

Main Menu > Today's Task > Task Details

### **Steps**

1. From the Task Details page, click the hypertext link Request number.

The Service Request screen opens.

2. In the Item field, if the item number is a hypertext link, then click it.

The IB Configuration screen for the selected item opens. This screen displays details about the item such as Item Instance number, Item number, Item Description, Quantity, Status, and also a spread table with all the related child Item Instances. The table includes the Item Instance number, the Item number, status, and serial number, if any.

If there is an icon to the left of the Item Instance number, this indicates that there are children items related to this item instance.

3. Click the icon to see the item instances related to that particular child item instance.
4. When you are finished, click Done.

### 3.2.6 Create a Service Request

One of the advantages Oracle Wireless Option for Service offers a field service operation is the ability create follow up work orders in those situations when a technician recognizes the need while out in the field. For example, a field service technician can initiate a new service request from a wireless device while on a customer call. This option is available either as a link from Service Request details information page, or from the main menu.

When creating a service request for the same customer while servicing a particular task, the Wireless Option defaults key information, such as customer name, address and contact name, if any. Customer name and address are uneditable.

The service request type, status, and severity default values are defaulted from profile options set up in Teleservice. These values can be overridden, if necessary.

After the SR has been created, the technician can add notes to the service request and also has an option to create a task against the service request. Once the task is created, parts requirements can be added to the task. Once an SR is created with an associated task, it is picked up by the dispatch center and can scheduled, either manually or through Oracle Advanced Scheduler, at that time.

For more information on creating service requests, see the *Oracle TeleService User Guide*.

Use the following procedure to create a service request from an existing task.

#### **Prerequisites**

None.

#### **Responsibility**

Field Service Wireless

## Navigation

Main Menu > Task Search > Task Details > Request Number > Service Request Create

## Steps

1. From the Task Details Page, click the Request Number hypertext link to navigate to the Service Request details page.
2. Click Create Service Request.  

This opens the Create Service Request screen and defaults the customer name and address from the existing service request that you were working on. The Type, Status and Severity fields are also defaulted, but you can change the values, if necessary.
3. Enter a Summary of the problem for which you are creating the service request.
4. Select an Item, if necessary to associate with the service request.
5. If the item is serialized, select a Serial Number.
6. Choose an Item Instance, if applicable.
7. Choose a Service Tag, if applicable.
8. Click OK to create the service request.

At this point you should get a service request number and a message that the SR was successfully created. The Request number screen is opened and, at this point, you can add Notes to the SR or you can add a Task.

9. To add Notes, click the Add hypertext link at the Notes field.
10. In the Notes screen, choose Type of note, the Status of the note, and enter a text Description of the note. When you are done, click OK to add the note and return to the request number screen.
11. To create a task for the service request, click the Add hypertext link at the New Task field.

This action opens the Create Task screen, which is exactly the same as the screen used to Create a follow-up task.

See Section 3.2.4, "Create a Follow-Up Task" for details.

12. Click OK when you are done.

## Guidelines

You can add a parts requirement to the task, which is associated with the new service request, just as you can when creating a follow-up task.

You can also create a Service Request from the Wireless Option main menu. In this case, you must provide all the relevant customer information.

### 3.2.6.1 Create Service Request from Main Menu

Technicians also can create service requests from the Main Menu. In this case, technicians have the opportunity to choose from among all the customer's that are on their Today's Tasks list. When they navigate to the Create Service Request screen from the main menu, the Customer Name field contains all the customer names drawn from Today's Tasks list in the drop-down list.

If you are creating a service request for a customer not contained in today's tasks list, you must know the product Service Tag, Item Instance, or Serial Number. Wireless can fill in the appropriate information if you know any of this information.

## Navigation

Main Menu > Create Service Request

## 3.3 Ordering Parts

You can order parts to replenish your trunk stock or to fill a specific need for a particular customer using the Wireless Option for Service. Ordering parts using the Wireless Option leverages the Oracle Field Service Spares Management component and involves an automated two-step process.

Initially, you create a Parts Requirement for a part and then, through the ATP (Available to Promise) functionality of Advanced Supply Chain Planning, an internal order is created.

An internal order to fill a parts requirement allows you to ship the necessary parts to a field engineer at the specified "ship to" address. You can check for part availability within the supply chain and, if the part is not available, you can also check if there are any alternate parts. These include both substitute and supersession parts.

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. Although often times you will create an internal order at the same time that you create the parts requirement, this is not

required. If you do not have ATP functionality, you can still create the parts requirement, but an internal order will not be created.

For more information on creating a Parts Requirement and creating an internal order, see the Spares Management section of the *Oracle Field Service User Guide*.

Use the following procedure to order parts through the Wireless Option for Service.

### **Prerequisites**

You must have ATP functionality enabled in Advanced Supply Chain Planning. You must also set the "CSP: Order Type" profile option, which is used to provide a default value for order type when creating internal orders.

### **Responsibility**

Field Service Wireless

### **Navigation**

Main Menu > Order Part (to replenish trunk stock)

Main Menu > Task Search > Task Details > Order Part (to associate a parts order to a task)

Main Menu > Today's Task > Task Details > Order Part (to associate a parts order to a task)

### **Steps**

1. Once you open the Order Part screen, choose the part that you want to order from the Item field list of values.
2. The Description field defaults from the item that you choose.
3. If there is a revision number, enter it here.  
If the item you choose doesn't require a revision number, the Revision field will not appear. This changes dynamically after you choose the item.
4. Enter the Quantity of parts that you are ordering.
5. The Location field will default to either the technician's primary address (if this is to fill an order to replenish trunk stock), or the customer's installed at address. You can change the address when creating your parts order if necessary.

6. Select the Need By Date by clicking Pick and choosing the date you want the parts.
7. Enter the Need By Time.

The Time is measured in military time and must be entered in the following format: hh:mi. So, for example, to enter a Need By Time of 5 p.m., type 17:00.

8. Click Submit finish the transaction.

At this point, you will get a message that the Parts Requirement has been created, along with a Parts Requirement number. If you have ATP functionality enabled, an internal order will be created as well.

## 3.4 Performing Advanced Parts Search

The ability to find parts quickly and economically are critical elements of a successful field service operation. Oracle Wireless Option for Service enables a technician to search for parts throughout the organization, including those trunk stocks of other technicians, the central warehouse and, if he has multiple sub-inventories assigned to him, he can search his other sub-inventories as well.

Once the appropriate parts are located, the Wireless Option enables the technician to make an internal transfer, create a move order transfer of parts, or to create an internal order.

The Wireless Option leverages Oracle Spares Management's advanced parts search functionality, including the consideration of alternative or superseded parts in the search. Optionally, the Wireless Option also uses Oracle Field Service's geocoding element to locate the nearest technicians for parts availability, based on distance and time, providing that the technician has a verifiable "installed at" address.

The parts search functionality is a two-step process. First you locate the parts needed to fulfill your order, either through your own alternative sub-inventories, a co-worker's sub-inventory, or the warehouse. Once you have located the parts, the next step is to place an order. There are three parts ordering methods available in Wireless:

- **Internal Transfer** -- This method is used when moving parts from one of your own alternative sub-inventories to the default sub-inventory.
- **Move Order** - This is used when requesting parts from a co-worker's sub-inventory. This method requires that a co-worker have at least one subinventory in the same organization as the technician's default subinventory.

- **Internal Order** -- This method is used when requesting parts from a central warehouse.

How to execute each of these methods is covered later in this section.

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**Note:** The parts search will be performed only in the organization in which the default sub-inventory has been installed.

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For more information on Parts Search functionality, see the Spares Management section of the *Oracle Field Service User Guide*.

### Using Radius Search Capabilities

The Wireless Option for Service leverages Oracle's geocoding capabilities, which enables technicians the ability limit the search for parts from co-workers' trunk-stock to those co-workers who are within a specified radius. The measurement unit is set with the profile option "CSFW: Default Distance Unit," which allows you to set the distance unit for measurement purposes. The available values are: Mile or Kilometer.

In order to use the radius search capabilities, one of the technician's task must be in an assignment status of "Working" and the customer site must have a valid geocode address. This allows the geocode to determine where to begin the radius search. In order for co-workers to be considered in this search, they must also have valid geocode installed at addresses. Radius search is an optional feature of the Wireless Option for Service.

For more information on setting up the geocode functionality, see the *Oracle Field Service Implementation Guide*.

Other topics discussed in this section include:

Section 3.4.1, "Viewing Orders In"

Section 3.4.2, "Viewing Orders Out"

Use the following procedure to perform a parts search.

### Prerequisites

You must have ATP functionality enabled in Advanced Supply Chain Planning. You must also set the "CSP: Order Type" profile option, which is used to provide a default value for order type when creating internal orders. Oracle Spares Management must also be installed.

If you want to use radius search capabilities, a task must have the status of "Working," and geocode functionality must be implemented.

## **Responsibility**

Field Service Wireless

## **Navigation**

Main Menu > Part Search

Main Menu > Task Search > Task Details > Part Search

Main Menu > Today's Task > Task Details > Part Search

## **Steps**

1. Navigate to the Parts Search screen.
2. Choose the Part Number, of the part you want to search for.  
The part description will be defaulted. Also, if there is no Revision number, that field will be removed.
3. If you want to include Alternate Parts in the search, choose the checkbox.
4. Select the Quantity of parts you need.
5. In the UOM field, select the Unit of Measure for the part.
6. Select the sources in which you want to search for your parts by choose the appropriate checkbox.  
The options include: Warehouse, My Subinventories, My co-workers. You can choose any number of the three to search.
7. Click Search to begin the search.  
The Search Results screen displays all the subinventories and warehouses that fit the criteria. The spreadsheet is separated into the Warehouse entries, My co-workers, and the technician's other subinventories.

### **3.4.0.2 Creating an Internal Transfer**

In many field service operations, a technician may have multiple subinventories assigned to him within the same organization. The Wireless Option allows a technician to search all subinventories that reside in the same organization as the default subinventory for available parts. If a technician performs a parts search and

finds that the necessary parts are in one of his other subinventories, he can create an internal transfer.

### 3.4.0.3 Creating a Move Order

In the event that a field service technician performs a parts search and the required parts can be found in the trunk stock of another field technician working in the same organization, he can create a move order to fill this request.

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**Note:** In order to create a move order, the co-worker's subinventory must be in the same organization as the technician's default subinventory.

---

---

When creating a move order that is associated to a particular task, the task assignment status should be "Working" during the search.

Follow this procedure to create a move order.

#### Prerequisites

If you are using the geocode functionality to determine the distance of available co-workers, it must be properly installed and you must have a valid "installed at" address for the technicians included in the search.

#### Steps

1. After you have performed the search for a part, navigate to the search results screen.

This screen displays the item number, the name of the resource, the quantity available, the subinventory that contains the parts and the phone number.

2. Click on the hypertext linked name of the resource that you want to create the move order from.

The Move Order screen opens. This includes the resource name and phone number, the source subinventory and the quantity of parts.

3. In the Destination field, choose the subinventory to use to receive the move order parts shipment.
4. Add any comments you want to the move order.
5. Click Create.

## Guidelines

You can view the move order by navigating to the Orders - In link from the main menu.

### 3.4.0.4 Creating an Internal Order

Technicians can create an internal order if their parts search includes warehouses that are located within the same organization as their default subinventory.

You can include substitute and superseded parts in your search by checking the Alternate Parts checkbox.

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**Note:** this internal order functionality works exactly the same as it does in the Field Service Spares Management module and returns the same results.

---

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When performing an advanced parts search, the Wireless Option matches the "required" number of parts with the "available" number of parts in a warehouse. The application creates the parts requirement for the lesser of the two numbers.

Use the following procedure to create an internal order.

## Prerequisites

None.

## Steps

1. After you have performed the search for a part, navigate to the search results screen.

This screen displays the item number, the name of the warehouse, the arrival date and the shipping method.

2. Click on the hypertext linked name of the warehouse that you want to create the internal order from.

The Internal Order screen opens. This includes read only values for the source of the parts, the destination of the part, item number, UOM, and quantity.

3. In the Location field, choose the location where you want the parts shipped. The default value is either the customer's installed at address, or the technician's default address. You can change this value.

4. Choose a Need By Date for the parts.

5. Enter the Time by which you need the parts.

This is a 24-hour clock and should be represented as 00:00. So, if you need the parts at 8 a.m., enter 08:00.

6. Click Submit to create the internal order.

### **Guidelines**

If you do not have ATP functionality enabled, the Wireless Option will still create a parts requirement, but it will not create the internal order. The internal order can be created by the dispatcher at a later time.

## **3.4.1 Viewing Orders In**

The Orders In link in the Wireless Option for Service enables a technician to view all parts orders that are coming into the technician's subinventories. This functionality displays the parts orders for all of the technician's subinventories that reside in the same organization as the one his default subinventory is located.

The Orders - In view displays Move Orders and Internal Orders that are scheduled for the technician's trunk stock. The spreadtable displays base parts order information such as order number, item number, quantity, and status of the order. The available statuses for the parts order in this view range from Approved, to Reserved or Entered.

A technician can view details of the order by clicking on the hypertext order number link. If a technician wants to cancel the order, he can do so from the order details page.

Follow this procedure to view Orders In.

### **Prerequisites**

None.

### **Responsibility**

Field Service Wireless

### **Navigation**

Main Menu > Orders - In

### **Steps**

1. Navigate to the Orders - In screen by clicking on the link in the Main Menu.

This view displays the spread table for all the Move Orders and Internal Orders for this technician.

2. To view the details of the order, click the hypertext order number link.

The Order details screen opens and displays pertinent details such as Required Quantity, Order Quantity, Need By Date, and so on.

3. If you want to cancel the order, click Cancel Order.

This action changes the status of the order to "Cancelled" and removes it from the spreadsheet.

4. Click Done to return to the Orders - In main screen.

### 3.4.2 Viewing Orders Out

The Orders Out link in the Wireless Option enables a field service technician the ability to view all move orders that are outgoing of a technician's subinventory. Outgoing parts orders from the technician's subinventory to either another technician's subinventory.

A technician can perform three actions on parts orders from the Orders Out screen:

- View the order details
- Reject the order if he doesn't want complete the order
- Transact the move order.

In the latter case, the status of the move order is changed to "closed" and the order is no longer listed in the Orders Out screen.

In the Orders - Out screen, the spreadsheet displays all the move orders or transfers in progress for the technician. The attributes displayed are the parts order number, the item number, the quantity of the order and status of the order.

Use the following procedure to view Orders Out.

#### **Prerequisites**

None

#### **Responsibility**

Field Service Wireless

## Navigation

Main Menu > Orders - Out

## Steps

1. Navigate to the Orders -Out screen.  
The Orders - Out screen displays a spreadsheet for all the move orders or internal transfers in progress for the technician.
2. Click the Order number to view the details of a particular Order.  
The Move Order Transaction screen displays move order details such as Organization, Source, Destination, Item, the date the move order was created and so on.
3. At this point, you can either Reject the move order, Transact the move order, or Cancel the action and return to the Order - Out screen.
4. Click Done to return to the Main Menu page.

## 3.5 Accessing the Knowledge Base

In a field service operation that services a variety of products or makes multiple customer calls involving similar issues, it can be advantageous to record and store solutions so that you or other technicians can access them at a later date. The Oracle Knowledge Management application provides a mechanism for recording solutions for problems and it can be accessed by the Wireless Option for Service.

Through the Wireless Option, you can make a general knowledge base search, or you can make a search related to a specific service request. In the latter scenario, once you choose a KB solution, you can manually attach it to the SR and it can be viewed at any time.

If you search the KB from the main menu, you cannot attach any solutions to a specific service request. You can only view the solutions.

The Wireless Option supports two search methods: Keyword search and search by category. If you are searching the knowledge base for a specific service request, the SR Summary serves as the keywords in the keyword search field. You can change the keyword value, if necessary.

Category search is only available through the main menu.

For complete details on using Knowledge Management and setting up Knowledge Management functionality, see the *Oracle Knowledge Management User Guide*.

Use the following procedure to perform a knowledge management search and attach it to a particular service request.

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**Note:** The Wireless Option for Service only supports text-based messages. Any Knowledge Management solution that contains dynamic links or HTML pages will not show up in the search results.

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### **Prerequisites**

You must have Oracle Knowledge Management installed and properly configured, including category setup.

### **Responsibility**

Field Service Wireless

### **Navigation**

Main Menu > Task Search > Task Details > Request Number > Knowledge Base

### **Steps**

1. Navigate to the task in which you want to perform a knowledge management search on.
2. From the task details page, click the hypertext Request Number associated to the task.

The Request Number screen opens and displays basic information associated with the Service Request (Customer name, summary, notes, and Knowledge Management).

3. Click View in the Knowledge Base field.

The screen displays the Keyword field, which is populated with the SR Summary information, and also the Keyword Solution table with all the solutions that are associated with keyword.

4. If you want to search for additional solutions, enter alternative words in the Keyword field and click Go.

Any related solutions are displayed in the solution table, which also displays the Score(%) of the relevance of the solution, the title and the type of solution.

5. To view a solution, click the hypertext Title of the solution you want to view.

The details of the knowledge base solution are displayed. This information includes the symptom a customer might be experience, the list of potential causes of the problem, and some solutions.

6. If you want to attach this solution to the Service Request, click Link.
7. Once you have linked the KB solution, click Done to exit.

### **Guidelines**

You can link multiple Knowledge Base solutions to the same Service Request. All linked solutions will appear in future searches for that particular service request.

#### **3.5.0.1 Searching the Knowledge Base from the Main Menu**

You can search the Oracle Knowledge Management application from the Main Menu of the Wireless Option for Service, including category search. Use the following procedure to search the Knowledge base from the Main Menu.

### **Navigation**

Main Menu > Knowledge Base

### **Steps**

1. Once you navigate to the Knowledge Base screen, you can enter a Keyword and click Go to perform a keyword search.

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**Note:** Keyword search is similar to the keyword search from within a service request. The only difference is you cannot link a KB solution to a Service Request from the main menu.

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2. To perform a category search, click the Categories hypertext link.  
This opens the Category Home page. All categories that you have setup in Knowledge Management (for example, computers, appliances, copiers, and so on) appear under the Sub-Category heading.
3. To search one of the sub-categories, click the hypertext name of the category you want to search.  
By default, the search will display all solutions associated with the category.

4. If you want to filter the search, in the View field select the time frame you want to search (for example, One Past Week, One Past Month, and so on) and click Go.

The results of the search are displayed.

5. To view a solution, click the hypertext name of the solution you want to view.
6. Click Done when you are finished viewing the solution.

## 3.6 Saving and Viewing Offline Schedule

Oracle Wireless Option for Service operates in a connected (network) environment. It requires having network coverage at all times for accessing the enterprise information. However if the technician's wireless device is out of coverage, they can still access the information required to complete their job at the customer site.

Field service technicians have the ability to save the schedule of tasks assignments and their related information for the system date on their wireless device. The representatives will be able to view these pages in offline mode when coverage is unavailable.

Each time their schedule is updated or changes, a notification is sent alerting them to update their daily schedule and resave the offline schedule.

### Prerequisites

None.

### Responsibility

Field Service Wireless

### Navigation

Main Menu > Today's Task

### Steps

1. Navigate to Today's Tasks.
2. When the screen opens, use the application's "Save As" feature to save this page as a static html page.

Save the page with a name you will recognize and save it to a local directory on your PDA.

3. If you receive an "Update Schedule" notification, indicating that your schedule has been updated -- this includes any status change, or time/date change to a task -- you can resave your schedule using the same file name you used in Step 2.

## 3.7 View Excess Parts List

Excess parts are defined as those parts whose inventory balance is greater than the maximum level defined in the Authorized Stock List (ASL) in Spares Management. Internal order transfers for excess parts are created when the return of those parts is approved. The user sees the excess list information such as item number, unit of measure, sub inventory and condition type.

Field Service Wireless will display the excess parts list on a medium screen factors. The user will be able to invoke the excess parts list by accessing the excess parts link from the main menu.

The following information is displayed on the excess parts return UI:

**Created On** - This is the date the list was created.

**Subinventory** - This identifies the subinventory that contains the excess part.

**Condition** - This displays whether or not the subinventory is for "usable" parts or "defective" parts.

**Return to** - This displays the warehouse name and organization where the parts will be returned.

**Excess quantity** - This refers to the quantity that is in excess of the maximum quantity as defined in the ASL after applying the excess rules.

The excess parts information is generated by a scheduled concurrent program that is run in Spares Management.

For more information on Excess Parts Lists, see the Spares Management section of the *Oracle Field Service User Guide*.

Use the following procedure to view the Excess Parts List.

### Prerequisites

You must have Oracle Field Service Spares Management fully implemented.

### Responsibility

Field Service Wireless

**Navigation**

Main Menu > Excess Returns

**Steps**

1. From the Main Menu, click Excess Returns.

The excess return screen opens. This screen displays all the sub-inventories assigned to the field service technician and all the excess parts contained in each of those sub-inventories.

2. Click Done when you have finished viewing the Excess Return list and want to return to the Main Menu.

## 3.8 Managing Receipt of Parts

Oracle Wireless Option for Service allows technicians the capability to view, confirm, and log as "completed" all their incoming parts shipments. The main menu provides easy access to the list of shipments.

From the main menu, by navigating to the Receive Parts - Incoming Shipment screen, users can see a list of all shipments, which includes the shipment number, what organization the shipment came from, and the date shipped. By clicking on a particular shipment link, the user can see details about the shipment.

Once technicians view and confirm shipments as having been received, they can select those shipments and mark them as completed.

Use this procedure to view parts shipments and log them as complete.

**Prerequisites**

None.

**Responsibility**

Field Service Wireless

**Navigation**

Main Menu > Receive Parts

**Steps**

1. Navigate to the Receive Parts - Incoming Shipments screen.

A list of incoming shipments is displayed.

2. To view the details of a particular shipment, click on the link.

The Shipment Details screen is opened. This displays additional information about the shipment, including the vendor name, expected date of receipt, order number, item number, quantity, and so on.

3. If the shipment has been received, click Receive Complete.
4. Alternatively, from the main page, you can select the checkbox of all the shipments you have received and click Receive Complete.

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## Wireless Voice Device Commands

The Oracle Wireless Option for Service is a voice-enabled application. As such, there are specific commands that relate to specific actions within certain voice-enabled tasks that are coded into the application. Similarly, the Wireless Option also supports Dual Tone Multi Frequency (DTMF) functionality, or keypad data entry.

### A.1 Wireless Tasks Supported by Voice Devices

The following Wireless Option actions are supported by the voice devices:

- Speech Grammar common across the application
- Task Summary
- Date
- Another Date
- Search
- Task Entry
- Request Entry
- Search Confirm
- Task Details
- Confirming the task assignment status
- Request Details
- Customer Details
- Call Customer
- Accepting a Prefix

- Counters
- Counter Summary Screen
- Counter Details
- Counter Reading Entry
- Accept New Counter Reading Entry
- Debrief Summary
- Update Resolution Code
- Expense Item and Expense Amount for Debrief
- Labor Item and Labor Duration for Debrief
- Confirm entry of Resolution Code/ Expense Debrief/ Labor Debrief
- Speech Grammar common across the application

The following tables detail the Speech Grammar and the DTMF Grammar for all the actions relating to the above Wireless Option Voice-enabled activities.

### Speech Grammar common across the application

The following table contains actions that are common in most modules of the Application.

Action	Speech Grammar	DTMF Grammar
Explains the actions for this card	{Help}	0
Navigates to the Main Menu	{main menu}	n/a
Cancel the Current Operation	{cancel}	*
Play the entire list of Speech Grammar	{touchtones}	#
Plays the tutorial	{tutorial}	n/a
+ Previous item in current list	{previous}	4
+ Next item in current list	{next}	5
+ First item in current list	{first}	6
+ Repeat the current item	{repeat}	66
+ Last item of current list	{last}	7

Action	Speech Grammar	DTMF Grammar
+ Search for task or service request	{search} {task search}	8
+ Change the date of the tasks	{change date} {enter date} {date}	9

+ - These actions are not available in modal and data entry screens.

### Task Summary

This activity lists the tasks for a particular day or the results of a task or service request search.

Action	Speech Grammar	DTMF Grammar
Task Details	{Task details} {details}	1
Counters	{edit counters} {counters}	2
Change Status	{change status} {status}	3
Previous	{previous} {go back}	4
Next	{next} {skip} {go forward}	5
First	{first} {beginning} {skip}	6
Repeat	{repeat}	66
Last	{last} {end}	7
Search	{search} {task search}	8
Date	{change date} {enter date} {date}	9
Main Menu	{main menu} {cancel} {goodbye}	*
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

### Date

This activity provides the ability to switch dates.

Action	Speech Grammar	DTMF Grammar
Yesterday	{yesterday} {view yesterday} {go to yesterday} {yesterdays tasks}	1
Tomorrow	{tomorrow} {view tomorrow} {go to tomorrow} {tomorrows tasks}	2
Today	{today} {view today} {go to today} {today's tasks}	3
Previous	{previous}	4
Next	{next}	5
Another Date	{other} {pick day} {choose a day} {choose} {another date}	6
Search	{search} {task search}	8
Date	{change date} {enter date} {date}	9
Main Menu	{main menu} {goodbye}	n/a
Task List	{task list} {cancel}	*
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

### Another Date

This activity provides the ability to pick a new date. A user can say the date in the format October 19th, 2000 or type in the date in the format *yymmdd* (i.e. 20001019).

Action	Speech Grammar	DTMF Grammar
Search	{search} {task search}	8
Date	{change date} {enter date} {date}	9
Main Menu	{main menu} {goodbye}	n/a
Task List	{task list} {cancel}	*
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

## Search

This activity provides the ability to search for a task using a task number or request number.

Action	Speech Grammar	DTMF Grammar
Search by Task Number	{task} {search by task} {task number}	1
Search by Request Number	{request} {search by request} {request number} {service request number}	2
Search	{search} {task search}	8
Date	{change date} {enter date} {date}	9
Main Menu	{main menu} {goodbye}	n/a
Task List	{task list} {cancel}	*
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

## Task Entry

This activity allows the user to enter the task number to be searched. Numeric searches are allowed. A wild card % will be added at the end of the numbers. The user can say or type the digits.

Action	Speech Grammar	DTMF Grammar
Main Menu	{main menu} {goodbye}	n/a
Task List	{task list} {cancel}	*
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

## Request Entry

This activity allows the user to enter the request number to be searched. Numeric searches are allowed. A wild card % will be added at the end of the numbers. The user can say or type the digits.

Action	Speech Grammar	DTMF Grammar
Main Menu	{main menu} {goodbye}	n/a
Task List	{task list} {cancel}	*
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

### Search Confirm

The activity allows the user to confirm whether the task number or request number entered is correct. Say 'OK' or remain silent to continue. Say 'Cancel' to re-enter the search number.

Action	Speech Grammar	DTMF Grammar
Yes	{yes} {okay} {ok}	1
No	{no} {cancel}	2
Search	{search} {task search}	8
Date	{change date} {enter date} {date}	9
Main Menu	{main menu} {goodbye}	n/a
Task List	{task list} {cancel}	*
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

### Task Details

The existing Task Details action has the ability to navigate to Debrief.

Action	Speech Grammar	DTMF Grammar
Main Menu	{Main Menu}	n/a
Change Status	{change status}, {status}	1

Action	Speech Grammar	DTMF Grammar
Edit Counter	{counters}, {edit counters}, {change counters}	2
Request Details	{request details}, {request}, {service request details}, {service request}, {request number details}, {request number}	3
Previous	{back}, {previous}	4
Next	{next}, {skip}	5
First	{first}	6
Last	{last}	7
Customer Details	{customer}, {customer details}	8
Debrief	{debrief}	9
Repeat	{repeat}, {repeat task}	66
Task List	{task list}	*
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

### Change the Task Assignment Status

This activity allows the user to change the assignment status of a task.

Action	Speech Grammar	DTMF Grammar
Status Name 1	{status name 1}	1
Status Name 2	{status name 2}	2
+ Status Name 3	{status name 3}	3
Task Details	{task details}, {cancel}	*, Maximum Status DTMF GRAMMAR + 1
task list	{task list}	n/a
main menu	{main menu}	n/a
Repeat	{repeat}	66
Help	help	0

Action	Speech Grammar	DTMF Grammar
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ The Status Name actions continue until the user reaches the end of the available statuses.

### Confirming the Task Assignment Status

This activity allows the user to confirm the assignment status of a task.

Action	Speech Grammar	DTMF Grammar
Yes	{yes} {OK} {okay} {correct}	1
No	{no}, {never}, {no way}, {cancel}	2
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

### Request Details

This activity allows the user to access certain details of a Service Request.

Action	Speech Grammar	DTMF Grammar
Customer Details	{customer} {customer details}	1
Previous	{back}, {previous}	4
Next	{next}, {skip}	5
First	{first}	6
Last	{last}	7
Repeat	{repeat}	66
Search for task or service request	{search} {task search}	8
Change the date of the tasks	{change date} {enter date} {date}	9
Task Details	{task details}, {task}, {cancel}	*
Help	{help}	0

Action	Speech Grammar	DTMF Grammar
Tutorial	{tutorial}	n/a

## Customer Details

This activity allows the user to access certain details about the customer.

Action	Speech Grammar	DTMF Grammar
Call Customer	{call customer}, {call},	1
Task Details	{task details}, {task}, {cancel}	2, *
Previous	{back}, {previous}	4
Next	{next}, {skip}	5
First	{first}	6
Last	{last}	7
Repeat	{repeat}	66
Search for task or service request	{search} {task search}	8
Change the date of the tasks	{change date} {enter date} {date}	9
Tutorial	{tutorial}	n/a

## Call Customer

This activity asks the user whether he wants to add a prefix to the calling phone number.

Action	Speech Grammar	DTMF Grammar
Yes	{yes}, {OK}, {okay}, {add}, {prefix}, {add prefix}	1
No	{call customer}, {call}, {no}	2
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a
Customer Details	{customer details}	*

### Accepting a prefix

This activity is a form and accepts whatever the user punches in or says. Then the application calls the number and, after the call, returns to customer details.

Action	Speech Grammar	DTMF Grammar
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a
Customer Details	{customer details}	*

### Counters

These activities allow a user to capture counter reading for a particular customer product which has counters. If there is more than one counter associated with the customer product, then if the user says "counters" in the task details screen, the application goes to the counter summary screen. After selecting a counter, the application navigates to the counter detail screen. However, if there is only one counter, then the application navigates directly to the counter details screen.

### Counter summary screen

Action	Speech Grammar	DTMF Grammar
Counter Name 1	{Counter name 1}	1
Counter Name 2	{Counter name 2}	2
+ Counter Name 3	{Counter name 3}	3
Task Details	{task details}, {cancel}	n/a
task list	{task list}	n/a
main menu	{main menu}	n/a
Repeat	{repeat}	66
Help	help	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ Counter names continue to be prompted until the user reaches the end of the available counters. The maximum status is DTMF Grammar plus one.

### Counter Details

This activity lists the counter details.

Action	Speech Grammar	DTMF Grammar
Edit Counter	{edit}, {update}, {edit counter}	1
task list	{task list}	n/a
main menu	{main menu}	n/a
Repeat	{repeat}	66
Help	help	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

### Counter Reading Entry

The application is in edit mode at this point for the counter and accepts the counter reading as whatever the user types in or says.

Action	Speech Grammar	DTMF Grammar
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

### Accept New Counter Reading Entry

Action	Speech Grammar	DTMF Grammar
Yes	{yes}, {OK}, {okay}, {correct}, {update}	1
No	{no}, {never}, {cancel}, {no way}	2
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

Action	Speech Grammar	DTMF Grammar
+ Counter Summary / Task Details	n/a	*

+ The DTMF GRAMMAR function would take the user to either the Counter Summary Page or Task Details depending on whether or not there is more than one counter associated with the customer product.

### Debrief Summary

This activity allows the user to access the Debrief summary page.

Action	Speech Grammar	DTMF Grammar
Resolution Code	{resolution}, {change resolution}, {change resolution code}, {change code}, {resolution code}, {code}	1
Labor Debrief	{labor debrief}, {labor}	2
Expense Debrief	{expense debrief}, {expense}	3
Task Details	{task details}, {cancel}	4, *
main menu	{main menu}	n/a
Repeat	{repeat}	66
Help	Help	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

### Update Resolution Code

This activity allows the user to update the resolution code.

Action	Speech Grammar	DTMF Grammar
Resolution Code 1	{Code Name 1}	1
Resolution Code 2	{Code Name 2}	2
+ Resolution Code 3	{Code Name 3}	3
Debrief	{debrief}	*, Maximum Status DTMF GRAMMAR + 1

Action	Speech Grammar	DTMF Grammar
main menu	{main menu}	n/a
Repeat	{repeat}	66
Help	Help	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt Resolution Codes until the user reaches the end of the available codes. The Maximum Status is DTMF Grammar plus one.

### Service Activity Code for Expense and Labor Debrief

This activity allows the user to access the Service Activity Code for Expense and Labor Debrief.

Action	Speech Grammar	DTMF Grammar
Service Activity Code 1	{Activity Code Name 1}	1
Service Activity Code 2	{Activity Code Name 2}	2
+ Service Activity Code 3	{Activity Code Name 3}	3
Debrief	{debrief}	*, Maximum Status DTMF GRAMMAR + 1
main menu	{main menu}	n/a
Repeat	{repeat}	66
Help	Help	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt available service activity codes until the user reaches the end of the available codes. The Maximum Status is DTMF Grammar plus one.

### Expense Item and Expense Amount for Debrief

This activity allows you to access expense items and amounts in Debrief.

Action	Speech Grammar	DTMF Grammar
Expense Item 1	{item name 1}	1
Expense Item 2	{item name 2}	2
+ Expense Item 3	{item name 3}	3
Expense Amount	{amount in currency}	Number
Debrief	{debrief}	*, Maximum Status DTMF GRAMMAR + 1
main menu	{main menu}	n/a
Repeat	{repeat}	66
Help	Help	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt expense items until the user reaches the end of the available items. The Maximum Status is DTMF Grammar plus one.

### Labor Item and Labor Duration for Debrief

This activity allows you to access labor items and labor duration for debrief.

Action	Speech Grammar	DTMF Grammar
Labor Item 1	{item name 1}	1
Labor Item 2	{item name 2}	2
Labor Item 3	{item name 3}	3
Start Date	{start date of labor}	YYYYMMDD
Start Time	{start time of labor am/pm/hours}	HHmm
End Date	{end date of labor}	YYYYMMDD
End Time	{end time of labor am/pm/hours}	HHmm
Debrief	{debrief}	*, Maximum Status DTMF GRAMMAR + 1
main menu	{main menu}	n/a

Action	Speech Grammar	DTMF Grammar
Repeat	{repeat}	66
Help	Help	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt labor items until the user reaches the end of the available items. The Maximum Status is DTMF Grammar plus one.

### Confirm entry of Resolution Code/Expense Debrief/Labor Debrief

This activity allows the user to confirm entries of resolution codes, expense debrief, and labor debrief.

Action	Speech Grammar	DTMF Grammar
Yes	{yes} {OK} {okay} {correct}	1
No	{no}, {never}, {no way}, {cancel}	2
task list	{task list}	*
main menu	{main menu}	n/a
Repeat	{repeat}	66
Help	Help	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

## A.2 Key Task Flows Using Voice Devices

The following four diagrams detail some key business flows supported by the Oracle Wireless Option for Service voice component. The Wireless Option supports both voice commands and key pad commands.

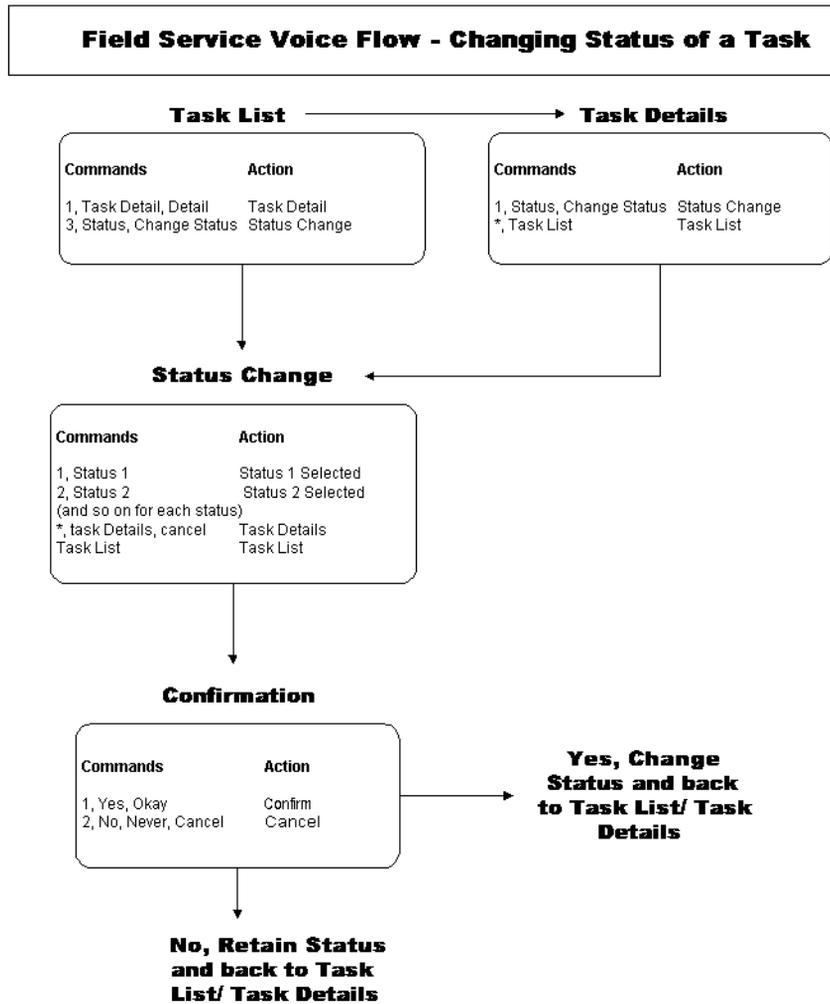
These flow diagrams will guide you through the following scenarios, beginning from the time you call into the system, until the completion of the task:

- Section A.2.1, "Changing the Status of a Task"
- Section A.2.2, "Creating a Labor Debrief"
- Section A.2.3, "Capturing a Counter Reading"
- Section A.2.4, "Call a Customer"

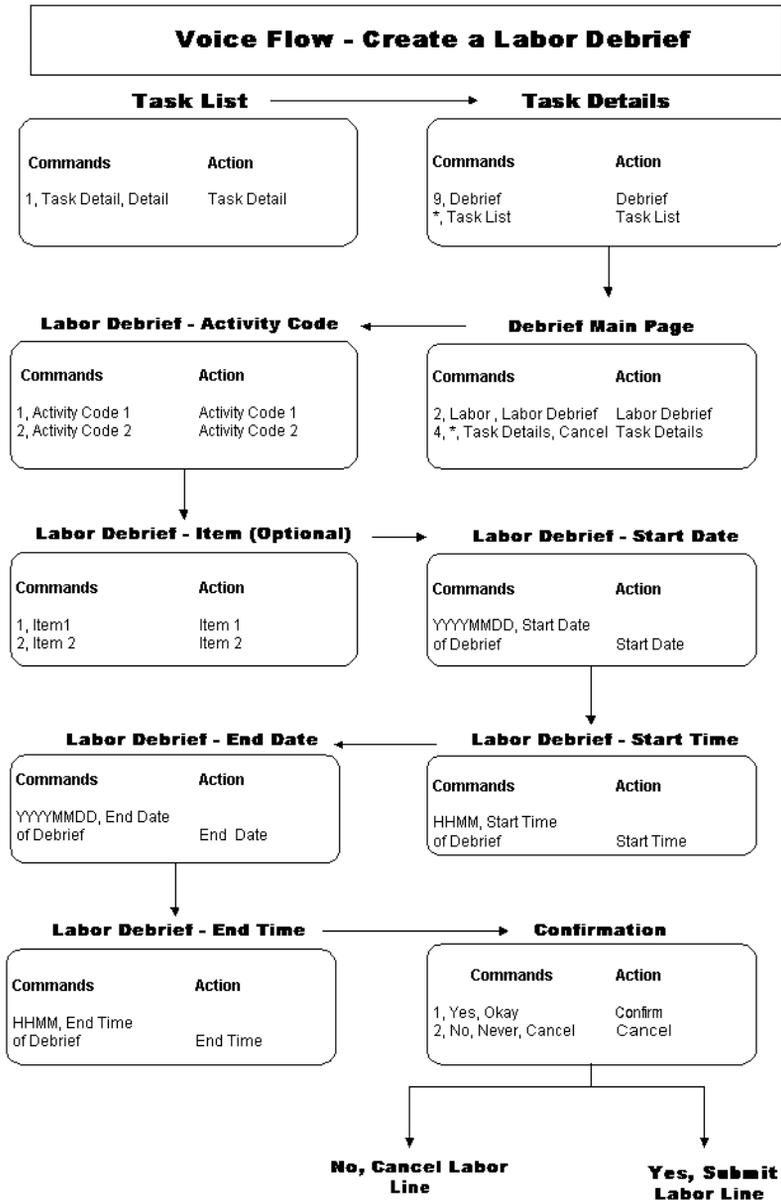
Within the flow diagrams, each step is comprised of a Command, which leads to an Action by the Wireless Option.

- **Command** - A command can either consist of a key pad stroke, such as pressing 1 or the \* (star) key, or a pre-defined voice command. In the Command column of each block in the flow diagrams, both the voice commands and the key pad strokes that will initiate the desired are listed.
- **Action** - The resulting action will be identical whether you use a key pad command, or a voice command.

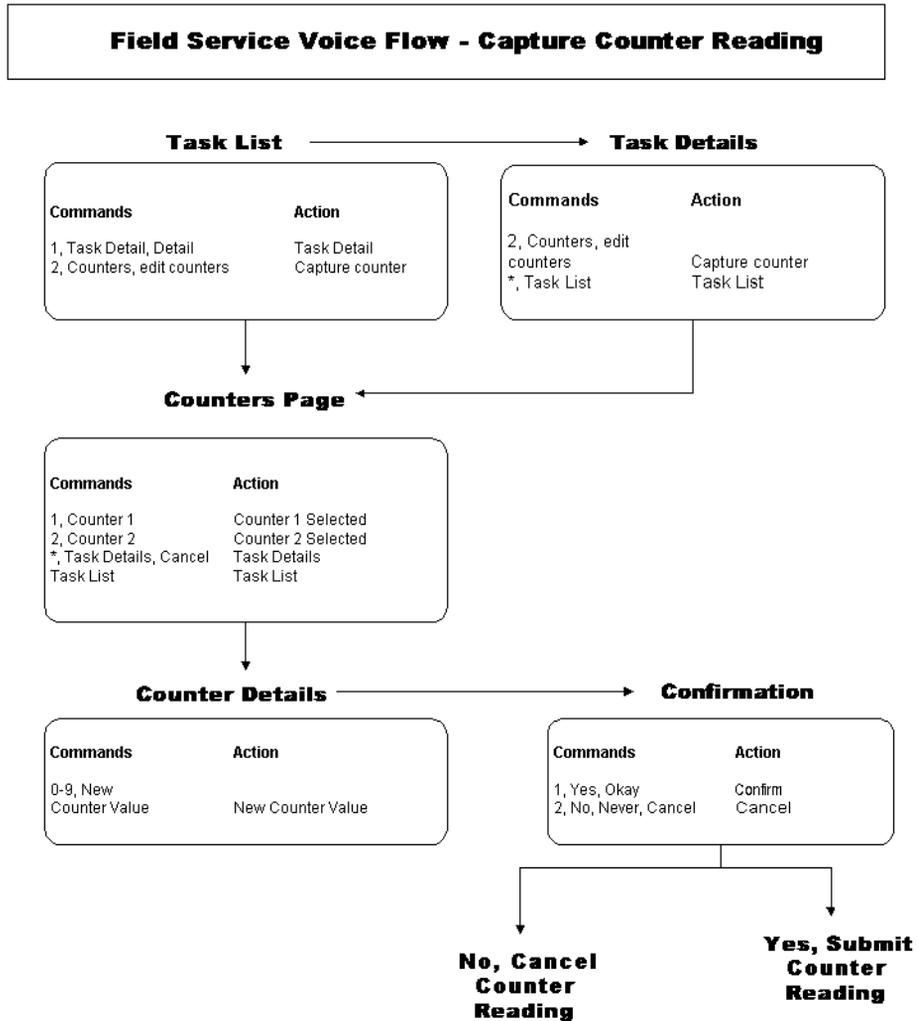
## A.2.1 Changing the Status of a Task



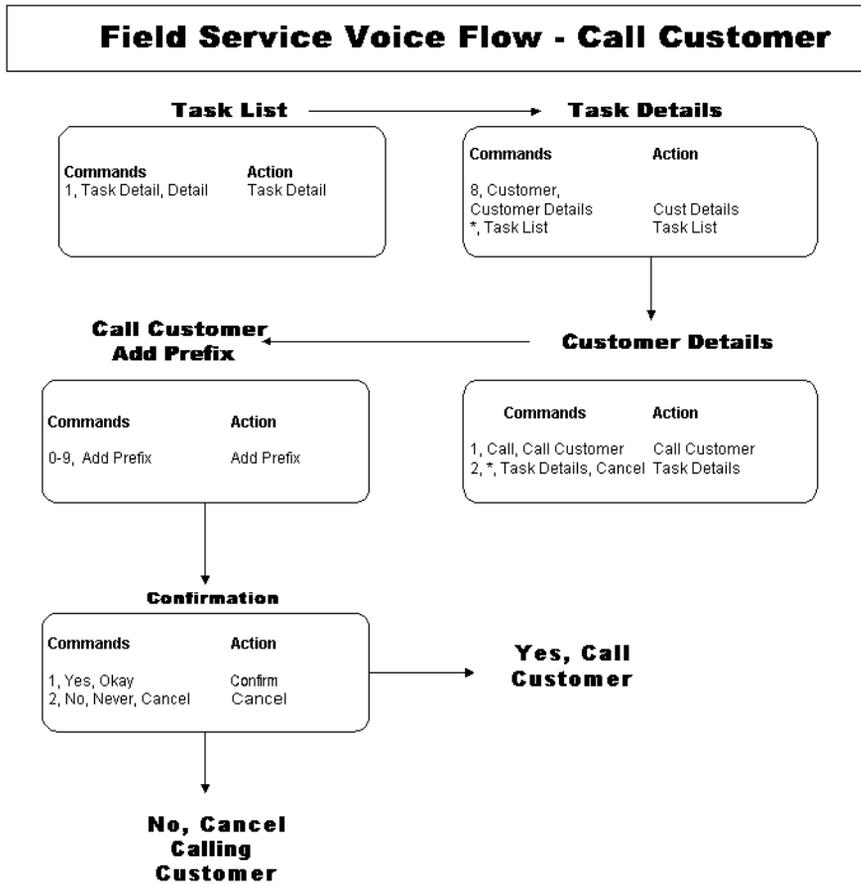
## A.2.2 Creating a Labor Debrief



## A.2.3 Capturing a Counter Reading



## A.2.4 Call a Customer



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## Profile Options

The following profile options are unique to Oracle Wireless Solution for Service. The profile options for Oracle Field Service and Oracle Spares Management are covered in the *Oracle Field Service Implementation Guide*.

### Prerequisites

None

### Responsibility

System Administrator

### Navigation

Profile > System

### Steps

1. After you navigate to the Find System Profile screen, check Site.
2. At the Profile field enter CSFW%.
3. Click Find.

You can set the profile options described in the following table in any sequence. All profile options have been provided with default values.

4. After you set each profile option, save your work.

### Profile Options for Wireless Option for Service

The Following table lists the names and descriptions of all the profile options unique to Oracle Wireless Option for Service.

	<b>Profile Option</b>	<b>Description</b>
1.	CSFW: Audio Path	This the URL that displays where all the audio files for Field Service Voice are located.
2.	CSFW: Date Format	This sets the format style of the date to be displayed in Wireless. (For example, 12/31/01, 12/31/2001, or 12-31-2002, etc.)
3.	CSFW: Default Distance Unit	This is the distance unit for measurement purposes in Wireless. Available values are: <ul style="list-style-type: none"> <li>■ Mile</li> <li>■ Kilometer</li> </ul>
4.	CSFW: Enable Signature Capture	This setting enables your Medium Form Factor device to capture customer signatures. Value: Y/N.
5.	CSFW: Home page	This setting dictates what to display on the User's home page. Possible values are: <ul style="list-style-type: none"> <li>■ Main menu</li> <li>■ Today's tasks</li> </ul>
6.	CSFW: Return Router	This is the URL address used for coming back to the APPS from 9iAS WE.
7.	CSFW: Router Location	This is the URL of the Router Skeleton at the 9iAS server.
8.	CSFW: Service History Days	When viewing service history, all the service request numbers that fall between the system date (sysdate) and the date entered here will be displayed.
9.	CSFW: Task Max	This is a numeric value that determines that maximum number of tasks to display on a screen.
10.	CSFW: Task display1	This sets the task summary display1 for Field Service Wireless.
11.	CSFW: Task display2	This is the task summary display2 for Field Service Wireless.
12.	CSFW: Voice Expense Activity Code	Default value is null. If a value is chosen, it will automatically be used and no voice prompt will be issued.
13.	CSFW: Voice Expense Item	Default value is null. If a value is chosen, it will automatically be used and no voice prompt will be issued.

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	<b>Profile Option</b>	<b>Description</b>
<b>14.</b>	CSFW: Voice Labor Activity Code	Default value is null. If a value is chosen, it will automatically be used and no voice prompt will be issued.
<b>15.</b>	CSFW: Voice Labor Item	Default value is null. If a value is chosen, it will automatically be used and no voice prompt will be issued.

