Oracle® Mobile Field Service

User Guide

Release 12

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Oracle Mobile Field Service User Guide, Release 12

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Preface

Intended Audience

Welcome to Release 12 of the *Oracle Mobile Field Service User Guide.*

See Related Information Sources on page xii for more Oracle Applications product information.

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Structure

1 Understanding Oracle Mobile Field Service

This chapter describes Oracle Mobile Field Service and how to administer it, how the application is structured, and how you can navigate in the application.

2 Installing Oracle Mobile Field Service/Pocket PC

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

3 Using Oracle Mobile Field Service/Pocket PC

This chapter describes how to use Oracle Mobile Field Service/Pocket PC to process service requests and tasks.

4 Installing Oracle Mobile Field Service / Laptop

This chapter describes what is required to install the Oracle Mobile Field Service / Laptop application. It also describes how to perform the initial launch and synchronization of the application.

5 Using Oracle Mobile Field Service / Laptop

This chapter describes how to launch the application and synchronize with the enterprise system after the initial installation and startup.

6 Understanding Mobile Field Service Wireless Option

7 Using Mobile Field Service Wireless and Voice

This chapter documents how technicians can use the Oracle Mobile Field Service Wireless and Voice to access information, debrief tasks, create service requests and tasks, schedule tasks and order parts.

8 Using Mobile Field Service Notifications

A Scheduling and Completing Tasks

B Oracle Mobile Field Service Wireless and Voice Device Commands

Oracle Mobile Field Service Wireless and Voice is a voice-enabled application. 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.

Related Information Sources

Oracle Mobile Field Service Implementation Guide

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your 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 an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

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

Part 1

Overview Oracle Mobile Field Service

1

Understanding Oracle Mobile Field Service

This chapter describes Oracle Mobile Field Service and how to administer it, how the application is structured, and how you can navigate in the application.

This chapter covers the following topics:

- About Oracle Mobile Field Service
- Overview of the Oracle Field Service Suite
- The Oracle Field Service Process
- Navigation Path of Oracle Mobile Field Service/Pocket PC

About Oracle Mobile Field Service

Oracle Mobile Field Service is part of the Oracle Field Service suite of products. (See the Overview of the Oracle Field Service Suite, page 1-2 for complete details.) Oracle Mobile Field Service offers both connected (browser based) and a disconnected-solution that enables field service technicians to service their customers in a fully automated way. Schedules are received and updated in a timely manner and service requests are resolved quickly.

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

Because Oracle Mobile Field Service runs on a Pocket PC, it is highly mobile and usable. The service request, and all associated information, is stored locally on the Pocket PC. This enables field service technicians to work in all places independent of network coverage. The dispatcher sends a job to the field service technician using Oracle Service Online, Oracle's field service application.

Overview of the Oracle Field Service Suite

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

Suite Application	Description
Customer Care	Customer Care is not a product of the Oracle Field Service suite but the Service Request form is delivered with the Oracle Field Service application. The Service Request form takes the customers call for service and creates a service request.
CRM Foundation	The products in CRM Foundation are essential to use Oracle Field Service. The CRM Foundation products create tasks, territories, define resources, and assist in the assignment of tasks to resources. CRM Foundation is delivered with Oracle Field Service.
Oracle Field Service	This application assists in assigning tasks to field service technicians, creating and dispatching daily schedules, monitoring progress, and reporting on material, expense, and labor transactions.
Advanced Scheduler	This application enables optimization of scheduling capabilities of tasks to qualified resources. It takes into account driving time, distance, and part availability, and it creates part reservations.

Suite Application	Description
Spares Management	This application provides additional logistics and planning features to manage a service parts inventory in a multi-location environment.
Mobile Application Foundation	This application consists of a mobile client and a central application. It provides data transport between the Oracle enterprise system and the Oracle mobile client database.
Oracle Mobile Field Service/Laptop	This application is a disconnected application typically installed on a field service technicians laptop. The field service technician can receive his daily schedule and report on progress, material, expense, and labor.
Oracle Mobile Field Service/Pocket PC	This application is a disconnected application for a Pocket PC. Field service technicians can receive their daily schedule and report on progress, material, expense, and labor.

The Oracle Field Service Process

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

Steps	Description
1. Service request intake and validation.	There are several ways to create a request for service. The customer can create the request by using the Web, Computer Telephone Integration (CTI), e-mail, or by dialing into a call center where an agent takes the call. A field service technician can also create a service request through a project or by a sales order (installation of a product). When the system receives the request, the customer, product and contract are checked in the validation step.
1. Service request screening and qualification.	After a service request is created, it is screened to avoid an unnecessary field visit. A support agent analyzes the service request by searching the knowledge base for a solution. As an outcome of this process, the request might be closed, a part may be shipped to the customer, or the customer might ship the part for in-house repair. When a field visit is required, a task is created based on the problem description and action needed to resolve the problem. A definition for the parts necessary to resolve the task is also given. The creation of a task for installation or maintenance of a customer product can be created automatically from a service contract or sales order.
1. Service request planning and dispatch.	The tasks must be scheduled, assigned, and dispatched to the field service technician. The scheduling of the tasks is done based on various constraints such as skills, location, availability, and required parts. When the tasks assignment is done, the task or schedule is dispatched to the field service technician. The field service technician receives notification and progress on the task is monitored.

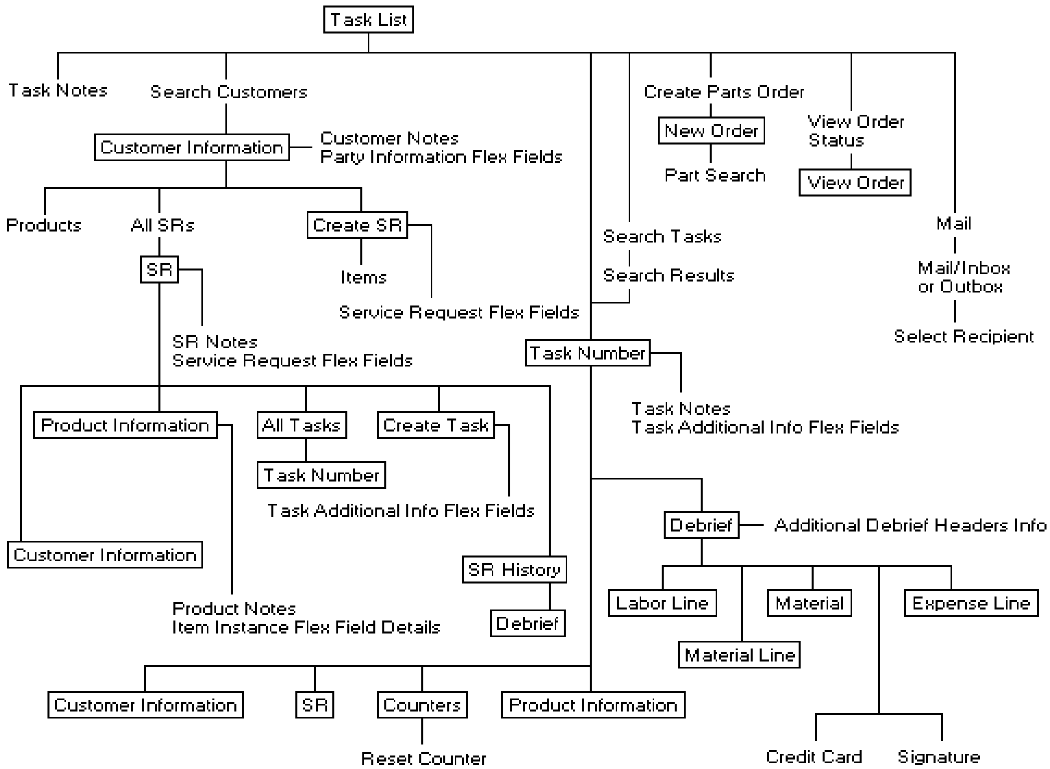
Steps	Description
1. Service request delivery and reporting.	Once the field service technician receives an assigned task or schedule, he can begin service at the customer site. He reports on progress, materials used and recovered, expenses, and labor time. Additionally, he can record counter readings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

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

Using Oracle Mobile Field Service you can apply the component Service Request Delivery and Reporting. In this application, the field service technician receives the schedule on their Pocket PC. They can record counter readings and report on material used, labor time, and expenses incurred.

Navigation Path of Oracle Mobile Field Service/Pocket PC

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



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

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

The Task screen describes the task. From this screen, you can access and create task notes and you can also access any customer product information, and the SR (Service Request) Details, customer information, and Debrief screens.

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

Using the Customer Information screen you can view the customers address and access and create customer notes and any Party Information flexfields. From this screen, you can also access the All Products, All SRs, and Create SR screens.

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

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

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

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

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

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

Part 2

Oracle Mobile Field Service/Pocket PC

2

Installing Oracle Mobile Field Service/Pocket PC

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

This chapter covers the following topics:

- Introduction
- Minimum Hardware Requirements
- Minimum Software Requirements
- Minimum Pocket PC Communication Requirements
- Installing the Application on Your Pocket PC
- Downloading and Installing the Oracle10g Lite Setup Program
- Synchronizing the Client Desktop PC with the Pocket PC
- Configuring mSync on the Pocket PC
- Performing a Full Synchronization
- Launching Oracle Mobile Field Service/Pocket PC
- Creating a Shortcut for Oracle Mobile Field Service/Pocket PC
- Subsequent Synchronizations

Introduction

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

Minimum Hardware Requirements

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

Desktop PC Hardware Requirements

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

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

Pocket PC Hardware Requirements

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

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

Minimum Software Requirements

This section describes the minimum PC and Pocket PC software necessary to run the Oracle Mobile Field Service/Pocket PC application.

Desktop PC Software Requirements

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

- Operating System: Windows NT 4.0 (Service Pack 5), Windows 2000, Windows XP, or Windows ME

- ActiveSync 3.6 and above

Pocket PC Software Requirements

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

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

Minimum Pocket PC Communication Requirements

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

- Wired modem

- Wireless modem

Installing the Application on Your Pocket PC

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

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

Procedure	Performed At
1. Downloading and Installing the Oracle10g Lite Setup Program, page 2-4	Client PC (the PC that the Pocket PC HotSyncs to)
1. Configuring mSync on the Pocket PC, page 2-6	Pocket PC
1. Performing a Full Synchronization, page 2-8	Pocket PC
1. Launching Oracle Mobile Field Service/Pocket PC, page 2-8	Pocket PC

Downloading and Installing the Oracle10g Lite Setup Program

Perform this procedure from the client PC desktop. In this procedure, you will download the mobile client from the Mobile Server and install the Oracle10g Lite setup program.

Steps:

1. Open your browser.

2. Enter the following URL in your browser, where <Mobile Server> is the domain name or IP address of the Mobile Server:

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

   For example: `http://130.35.88.214:8000/setup`

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

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

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

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

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

   The Setup program downloads all the required components.

Synchronizing the Client Desktop PC with the Pocket PC

Complete this procedure to synchronize the client desktop PC with the Pocket PC. This synchronization puts the Oracle10*g* Lite components, Oracle Mobile Field Service/Pocket PC, and the database on the Pocket PC.

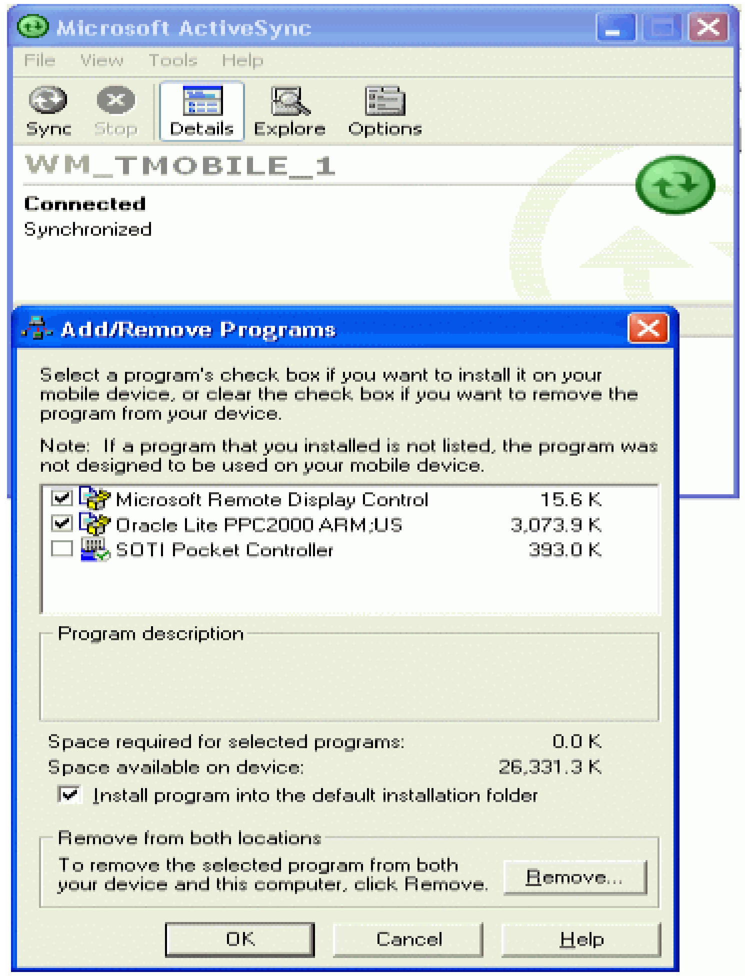
Steps:

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

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

3. Start Microsoft ActiveSync and then install Oracle10*g* Lite.

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



4. Perform an ActiveSync to put Oracle10*g* Lite components on the Pocket PC.

> **Note:** To do an ActiveSync to retrieve Oracle Mobile Field Service/Pocket PC itself and the data associated with it, the computer that hosts the ActiveSync manager must be able to connect to the mobile server using HTTP. Therefore, You must be able to connect to the mobile server through HTTP.
>
> You can also retrieve the application and copy the data onto the Pocket PC by connecting to any of the following modes:

- Wireless
  - Infrared

- USB
- ActiveSync
- Modem

Configuring mSync on the Pocket PC

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

Steps:

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

   The Programs screen opens.

2. Tap the File Explorer icon.

   The My Documents screen opens.

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

   The My Device screen opens.

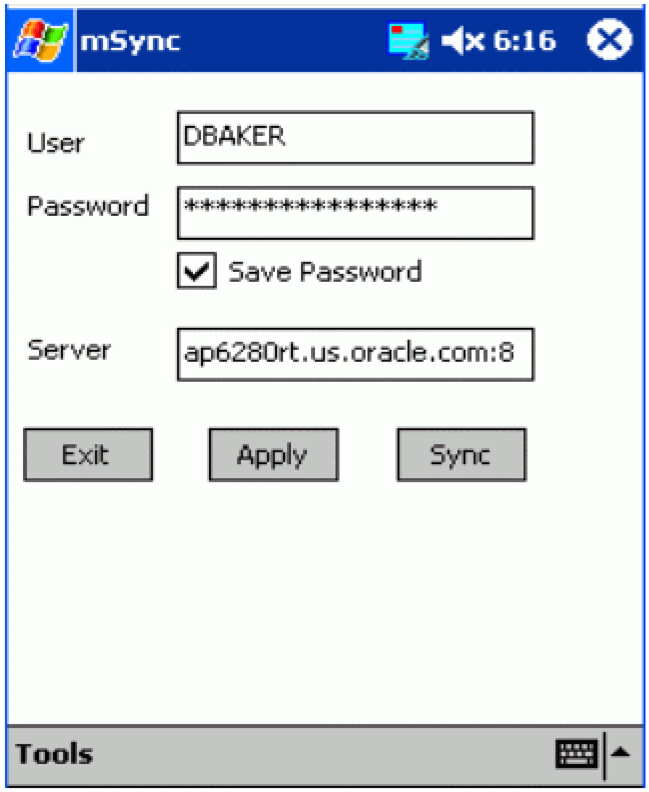
4. Tap the Orace folder.

   The Orace screen opens containing the mSync file

5. Tap on the mSync file to open it.

   The mSync screen opens.

mSync



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

mSynch

Information	Description
User Name	mSync client user name. This is case insensitive. (This is the Mobile Field Service username.)
Password	mSync client password. This is case insensitive.
Change check box	Do not select this check box.
Save Password check box	Select this check box to save the mSync username and password.

Information	Description
Server	IPaddress:port
Use Proxy check box	Select this check box if appropriate.
Force Refresh check box	Do not select this check box.

Performing a Full Synchronization

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

Complete the following procedure to perform a full synchronization.

Steps:

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

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

Launching Oracle Mobile Field Service/Pocket PC

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

Steps:

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

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

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

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

   The Orace screen opens containing the `Fieldservice.exe` file

5. Click on `Fieldservice.exe`.

   The Oracle Mobile Field Service/Pocket PC opens.

Creating a Shortcut for Oracle Mobile Field Service/Pocket PC

This section describes how to create a shortcut for Oracle Mobile Field Service/Pocket PC.

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

Steps:

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

   This is the same as the cut-and-paste option on the Pocket PC.

2. Choose the Copy option.

3. Go to the directory where the link is to be created.

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

4. Click on the **Edit** option in the bottom menu bar.

5. In the Menu pop-up, select **Create Shortcut**.

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

Subsequent Synchronizations

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

Complete the following procedure to synchronize the database on the Pocket PC.

Steps:

1. Go to the Oracle Mobile Field Service application.

2. Go to the home page of the application.

3. Click on the mSync icon.

3

Using Oracle Mobile Field Service/Pocket PC

This chapter describes how to use Oracle Mobile Field Service/Pocket PC to process service requests and tasks.

This chapter covers the following topics:

- Introduction
- Application Overview
- Launching Oracle Mobile Field Service/Pocket PC
- Using Global Functionality
- Configurable Display
- Data Search and Sort Capabilities
- Working with Your Task List
- Viewing a Past or Future Task List
- Viewing and Changing Task Information
- Viewing a Task Attachment
- Uploading Attachments
- Creating a Task
- Creating a Personal Task
- Working with Service Requests
- Creating and Viewing a Note
- Performing Debrief Reporting
- Obtaining an Electronic Signature
- Counter Readings
- Managing Spare Parts

- Viewing Customer Information
- Viewing Customer Product Information
- Using Messaging
- Synchronizing with the Enterprise System
- Closing the Application

Introduction

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

- View your task list for the day or all tasks assigned to you.
- Work easily with tasks and service requests.
- Create notes for tasks and service requests.
- View customer information.
- Create reports summarizing labor, material, and expense.
- Set counter readings.
- Obtain an electronic signature.
- View customer product information.

Application Overview

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

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

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

1. Launch Oracle Mobile Field Service/Pocket PC.

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

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

   See Synchronizing with the Enterprise System, page 3-87.

3. Review your calendar for the day.

   See Working with Your Task List, page 3-8.

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

   See Viewing and Changing Task Information, page 3-13.

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

   See Viewing and Changing Task Information, page 3-13.

6. Learn the customer address.

   See Viewing Customer Information, page 3-76.

7. Review service request information.

   See Working with Service Requests, page 3-27

   - Review contract information.

     See Viewing Contract Information, page 3-32.

   - Review service history information.

     See Viewing Service Request History, page 3-35.

   - Create or update a customer note if necessary.

     See Creating and Viewing a Note, page 3-41.

8. Set any counter and counter properties.

   See Counter Readings, page 3-69.

9. Report task details.

   See Debrief Reporting, page 3-45.

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

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

    See Closing the Application, page 3-88.

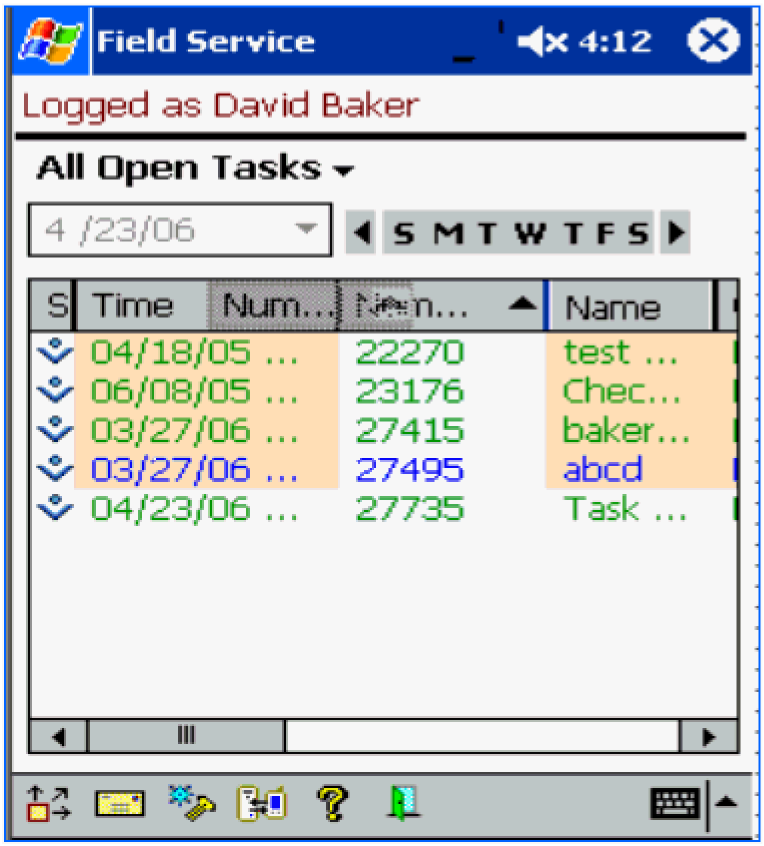
Launching Oracle Mobile Field Service/Pocket PC

Steps:

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

1. Choose `Start > FieldService`.

   Oracle Mobile Field Service/Pocket PC opens in the Task List screen. This screen is the starting point in the Oracle Mobile Field Service/Pocket PC application. See Working with Your Task List, page 3-8 for a complete description of the Task List screen.

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

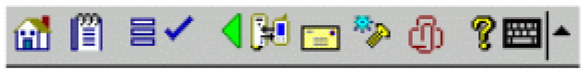
   See Synchronizing with the Enterprise System, page 3-87 for a complete description of this procedure.

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

Using Global Functionality

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

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



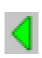
The global icons perform the following functions:

Tap the home to go to the Task List screen. See Working with Your Task List, page 3-8
.

Tap the notes icon to create or view notes. See Creating and Viewing a Note, page 3-41.

Tap the flexfields icon to view, change, or enter flexfield information.

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



Tap the left arrow icon to return to the previous screen.

Tap the synchronize icon to synchronize Oracle Mobile Field Service/Pocket PC with the enterprise system. See Synchronizing with the Enterprise System, page 3-87.

Tap the mail icon to access messaging. See Messaging, page 3-84.

Tap the parts icon to perform spares management. See Spare Parts Management, page 3-70.

Tap the attachment icon to view attachments for either a task or service request. See Viewing a Task Attachment, page 3-18 and Viewing a Service Request Attachment, page 3-32.

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

Configurable Display

Configurable display helps technicians customize screens.

- Search Task Results
- Search Customers
- Search Part Orders
- Search Parts Requirement

Hide, Show, or Re-size Columns

- To hide a visible column, select and drag the column sideways to decrease the width to zero.
- To show a hidden column, select the column, and then drag sideways to increase the column width.
- To re-size a column, select the column, and then drag sideways to adjust the width.

Change Column Sequence

To change the displayed column sequence, select a column, drag it from its current position, and then drop it in the desired position.

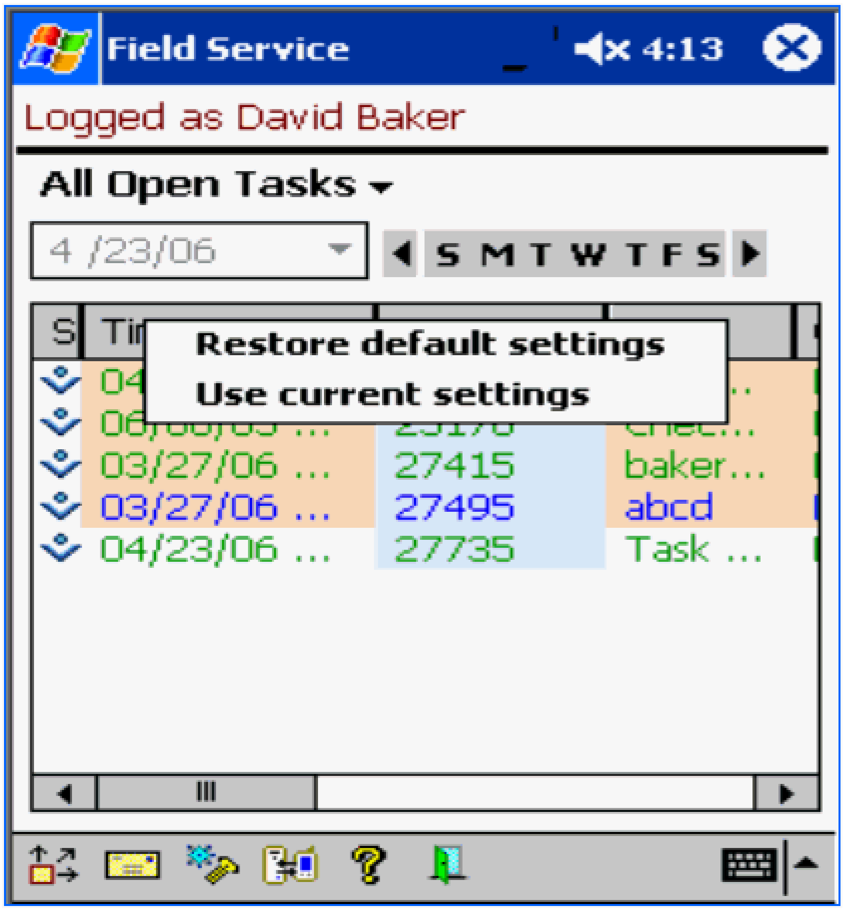
Restore Default Settings

To restore the default setting for a column:

1. Select the column.
2. Tap the right side of the column.

   The following two options appear:

   - Restore default settings
   - Use current settings



3. Tap Restore default settings.

Data Search and Sort Capabilities

Data search provides the ability to search on the information related to task by keying in the search data.

> **Note:** You cannot search on flex fields.

Data sort provides the ability to sort the information related to tasks in ascending or descending order.

- Search Task Results
- Search Customers

Using Data Search

Use these steps to perform a data search:

1. Select the field.
2. Start keying in the search value.

   Data containing that value is highlighted.

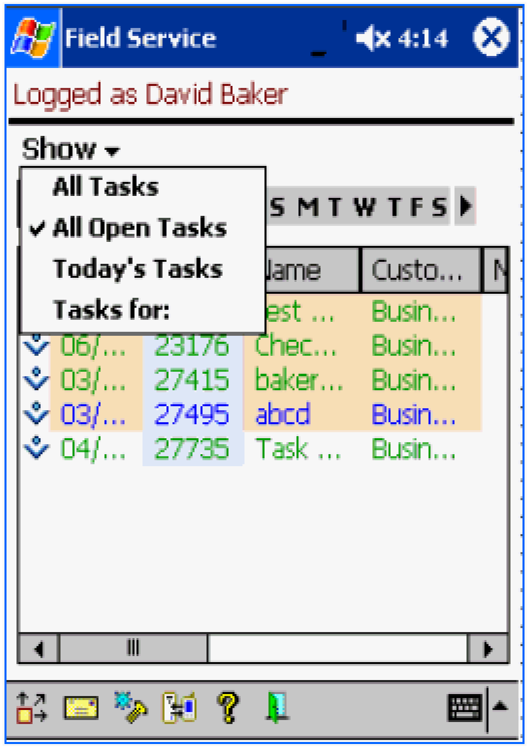
Working with Your Task List

A *task* is a unit of work within the service request. An administer creates a task during field service request screening and qualification in the office, or a field service technician creates a task when working out in the field. A task is related to a specific problem that needs to be resolved through a service request.

You will want to update the task status to keep your schedule up to date and to inform the dispatcher on the progress of your schedule. See Viewing and Changing Task Information, page 3-13 for a complete description of this procedure.

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

The Task List screen is the starting point in the Oracle Mobile Field Service Pocket PC application. The Task List screen lists non-closed tasks in descending order, based on the scheduled date and time stamp. See Viewing a Past or Future Task List, page 3-12 to view the tasks for a different day.



Understanding the Task List Screen

The Task List screen is updated each time you synchronize with the enterprise system. See Synchronizing with the Enterprise System, page 3-87 for a complete description of this procedure.

You can perform the following from the Task List screen:

- View tasks.
  - View 'Today's Tasks'.
  - View 'All Tasks' assigned to the technician (past, present, and future).
  - View 'All Open Tasks' assigned to the technician that are not Closed, Rejected, Completed or Canceled.
  - View 'Tasks for' a specific date.
- Search for task-related information.
  - Access information for a selected task.
  - Search for an assigned task.

    - Search for a customer for whom the technician is assigned tasks.

- View parts-related information.
    - View the on-hand quantity of parts.
    - View parts requirement status.

- Create orders and tasks
    - Create a parts requirement.
    - Create a personal task.

The Task List Screen Table

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

- Column 1: Task status
- Column 2: Task start time
- Column 3: Task name
- Column 4: Customer of the task
- Column 5: Task note icon
- Column 6: Contact
- Column 7: Phone

If you tap in either the Task Status, Task Start Time, or Task Name column, Oracle Mobile Field Service/Pocket PC opens the Task screen for a task. See Viewing and Changing Task Information, page 3-13 for a complete description of this screen. If you click in the Customer of the task column, Oracle Mobile Field Service/Pocket PC opens the Customer screen for a task. See Viewing Customer Information, page 3-76 for a complete description of this screen. Finally, if you click in the Notes column, Oracle Mobile Field Service/Pocket PC opens the Task Notes screen for a task. See Creating and Viewing a Note, page 3-41 for a complete description of this screen.

Task Statuses

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

Cancelled

Rejected

Assigned

Interrupted

Working

Completed

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

1. Upon initial download to the Pocket PC, a task has a status of "Assigned".

2. Once you review your schedule for the current day, change the status of "Assigned" tasks to "Accepted".

3. Before you start working on an "Accepted" task, change its status to "Working".

4. When you have successfully completed a "Working" task, change its status to "Completed".

See Viewing and Changing Task Information, page 3-13 to learn how to change the status of a task.

The Use of Color in the Task List Screen

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

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

Viewing a Past or Future Task List

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

- Using the date drop-down list, page 3-12
- Using the calendar bar, page 3-13

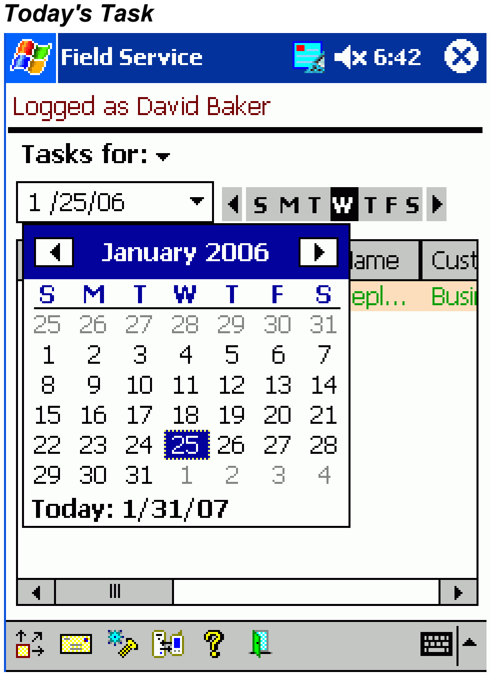
Using the Date Drop-down List:

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

1. Choose the view as 'Tasks for:'
2. Tap the date drop-down list.

   A calendar appears.

Today's Task



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

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

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

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

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

Using the Calendar Bar:

Complete the following steps from the Task List screen to change the day for the active week:

1. Tap the desired day of the week in the calendar bar.

   The tasks for the specified day appear in the Task List screen.

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

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

Viewing and Changing Task Information

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

- Tasks
- Service requests
- Customers
- Task notes
- Debriefs and counters
- Customer products
- Item details
- IB attributes related to the item

Complete the following steps to view and change task information:

Prerequisites

❒ Open a task from the Task List screen. See Working with Your Task List, page 3-8

and Viewing All Tasks for a Service Request, page 3-34.

Steps:

1. Navigate to the Task screen.

2. Use one of the following methods to open the Task screen:

   - *Open a Task Directly.*

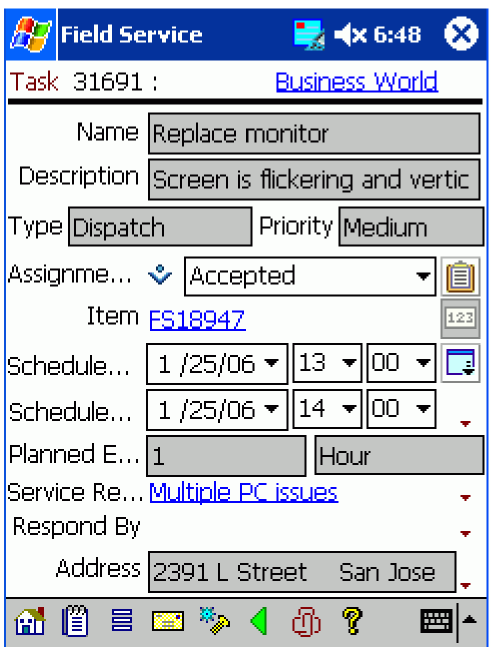
   - *Search for the Desired Task.*

Open a task directly

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

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

Task



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

Read-only Information	Description
Task Number	Located in the screen title, this is a generated number for a task.
Customer field	Located in the screen title, this is the name of the customer. Tap this field to view additional customer product information. See Viewing Customer Information, page 3-76 for a complete description of this procedure.
Name field	The name of the task.
Description field	Describes the task name.
Item field	The name of the customer product that needs service. Tap this field to view additional customer product information. See Viewing Customer Product Information, page 3-81 for a complete description of this procedure.
Type drop-down list	The type of task.
Planned Effort field	The planned time duration for executing the task
Service Request field	The name of the service request. Tap on this field to view additional information.
Respond By field	The date and time by which the customer needs a response regarding the task.
Address field	The address details for the customer.
Priority drop-down list	The priority of the task in which it is to be completed.
Esc	If a task is escalated on the enterprise system, then "Esc" appears in the upper right corner of the Task screen, across from the screen title.

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

   See Creating and Viewing a Note, page 3-41 for a complete description of this procedure.

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

   - Accepted: Select when you are ready to begin work on the task.
   - Cancelled: Select when the assigned task is not necessary.
   - Closed: Select when the work for the task is finished.
   - Completed: Select when the work for the task is finished.
   - Interrupted: Select when you want to place a task on hold.
   - Rejected: Select if the assigned task is not applicable to the current situation.
   - Working: Select when the task is in progress.

5. To change the task start time, make the appropriate selections from the Start Date drop-down lists.

   The default start time is the date and time the task was created.

6. To change the task end time, make the appropriate selections from the End Date drop-down lists.

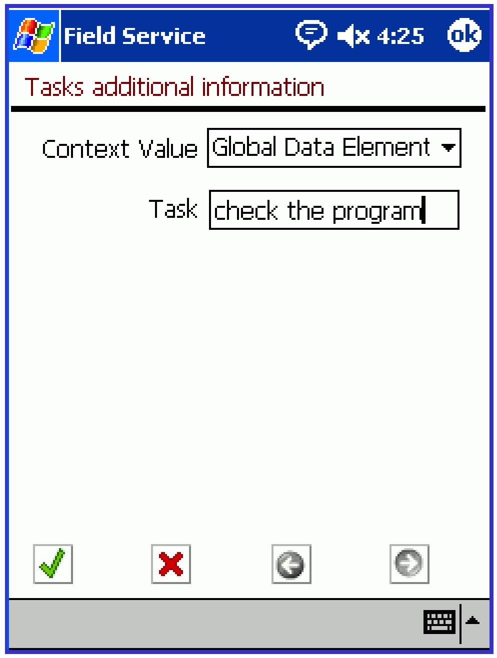
   The default end time is the date and time the task was created.

   To change the planned start and end time, tap the Planned/Schedule Dates icon and modify the planned, scheduled start, end date and time appropriately.

7. To view any additional task information, tap the flexfields icon in the lower portion of the screen.

   The Task Additional Information screen opens.

Tasks Additional Information



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

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

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

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

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

   The Debrief screen opens. From this screen, you can enter information for the labor, material, and expense reports. See Debrief Reporting, page 3-45 for a complete description of this procedure.

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

    The SR screen opens. In this screen, you can view and change service request details, including the problem and resolution. See Viewing and Changing Service Request Information, page 3-27 for a complete description of this procedure.

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

The Counters screen opens. In this screen, you can set a counter reading. See Creating a New Counter Reading, page 3-69 for a complete description of this procedure.

12. To view any parts requirement status for the task, choose **View Parts Requirement Status** from the Goto menu.

    See Viewing Parts Requirement Status, page 3-73 for a complete description of this procedure.

13. To specify a part for a task, tap the Parts icon in the tool bar.

    See Creating a Parts Requirement, page 3-71 for a complete description of this procedure.

Viewing a Task Attachment

From the Task screen, you can open and view any attachment associated with a task. The attachment can be of any type such as, a .pdf, .doc, .xls, or .gif.

Viewing a Task Attachment:

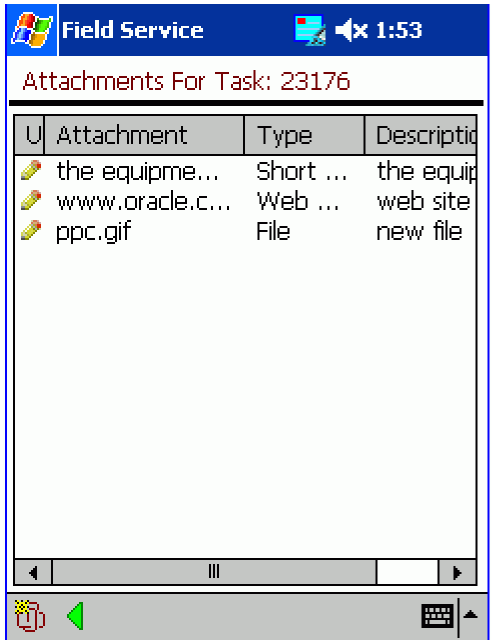
1. Navigate to the Task screen.

   See Viewing and Changing Task Information, page 3-13 for a complete description of this procedure.

2. Tap the attachment icon at the bottom of the screen.

   The Attachments screen opens, displaying the attachment file name, size, and description.

Attachments For Task



3. Tap the file that you want to open.

   The selected file opens.

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

Uploading Attachments

Field Service technicians have the ability to upload service request attachments such as photos, drawings, and diagnostic data from their mobile devices. Attachments can be added to tasks and service requests. Uploaded data can be viewed by the enterprise location after synchronization.

This feature assists technicians in capturing additional information related to task execution, such as diagnostic reports, image captures, and so on, that can be accessed at a later time.

Supported Attachment Types:

- Short Text Attachment.
  - Add text up to 4000 characters.
  - Size is not limited by profile value.
- Web Page Attachment.

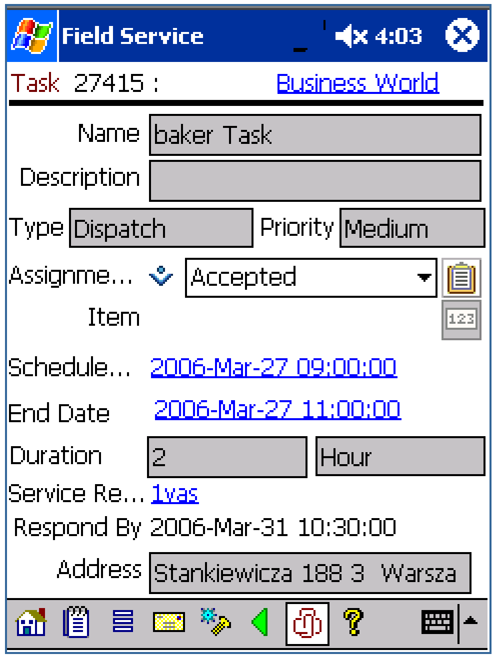
    - Link a URL up to 4000 characters.
    - Size is not limited by profile value.
- File Attachment.
    - Multiple files types are supported such as, .jpeg, .bmp, and .doc.
    - Attachment size is limited by the CSM: Maximum Attachment profile value. The profile value represents the size of the attachment in megabytes (MB) for each task or service request per synchronization.
        - If the profile value is not set, the value will be regarded as zero. The technician cannot upload or download file attachments.
        - If the attachment size is greater than the value set in the profile, then the application will generate an error message. The technician cannot upload the file attachment.

Attachments to a non existing Service Request or Task:

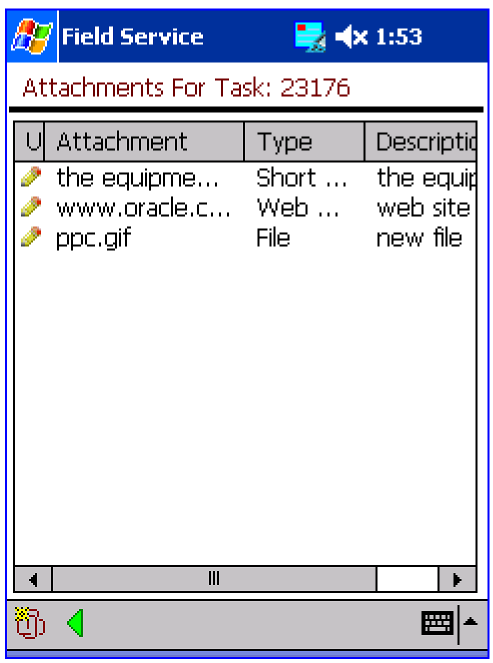
1. Create the service request in the pocket PC.
2. Associate a task to the service request, and then assign the task to the user.
3. Complete the steps in the next procedure "Attachments to an existing Service Request or Task".

Attachments to an existing Service Request or Task:

1. For the service request or task, select the attachment icon in the tool bar.



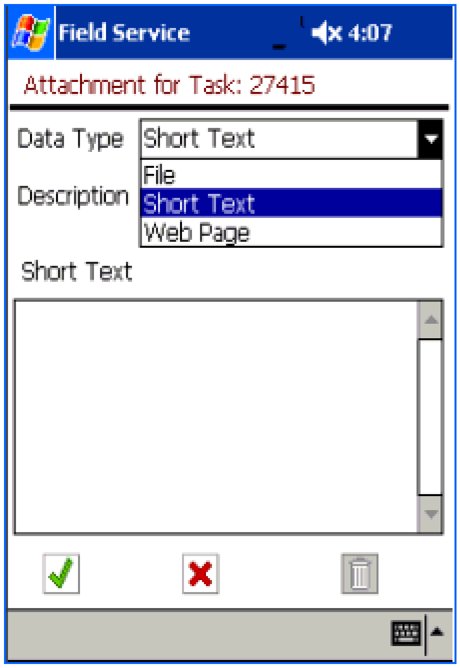
The Attachment Summary page appears.



2. Select the attachment "clip" icon to proceed with attachment details.

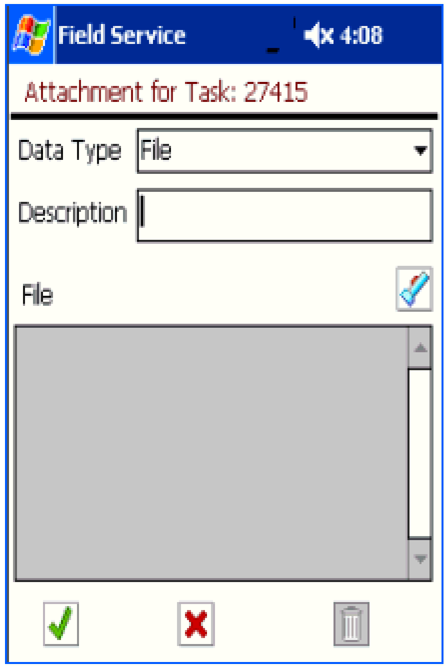
3. Select the type of the attachment from the Data Type drop-down menu. Attachment type options are:

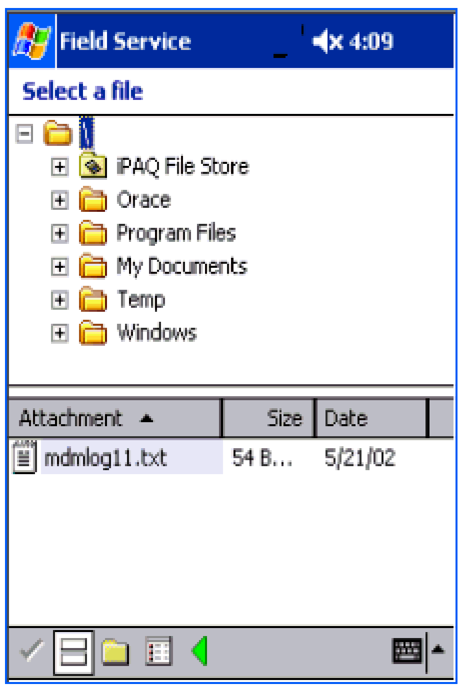
- File
- Short Text
- Web Page



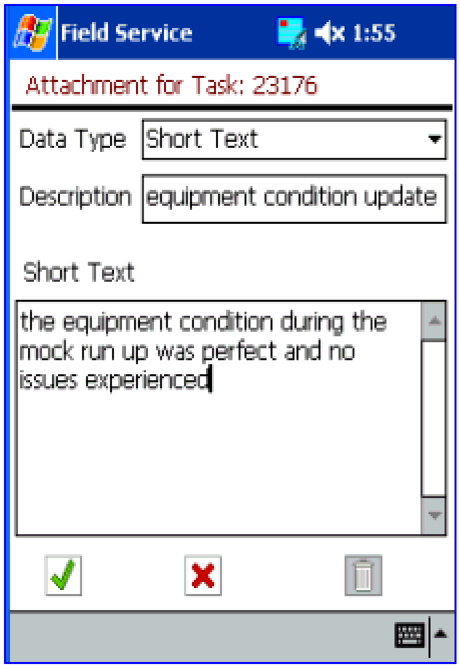
4. Depending on the type of attachment, provide details in the fields that appear.

   If the **File** attachment type is selected, enter the Description, and then use the search "flashlight" icon to find the location of the file, or enter the location details of the file in the File field column.





If the **Short Text** attachment type is selected, enter the Description, and then enter up to 4000 characters of text in the Short Text box.



If the **Web Page** attachment type is selected, enter the Description, and then enter up to 4000 characters of URL address in the Web Page.

5. Click the Check mark button.

6. Synchronize with enterprise to upload the new attachment details to the enterprise.

Creating a Task

Complete the following steps to create a task:

Steps:

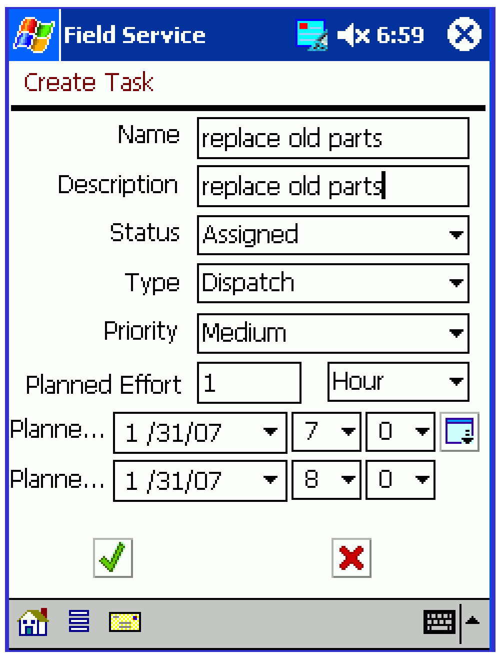
1. Navigate to the SR screen.

   See Viewing and Changing Service Request Information, page 3-27 for a complete description of this procedure.

2. Tap **Create Task**.

   The Create Task screen opens.

Create Task



3. In the Name field, enter the name of the task that you want to create.

4. In the Description field, enter a brief description of the task.

5. From the Status drop-down list, select task status.

   The default selection is `Unassigned`.

   > **Note:** For a task to be automatically assigned to you, it should have the "Assignment" attribute and the task type should have the

Dispatch rule. You can immediately work on a task with this criteria, which includes entering debrief reports.

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

   Next to this field is a drop-down list where you can select the type of time units.
9. To change the task planned start date, select a new date from the Start drop-down list.

   See Using the Date Drop-down List, page 3-12 for a complete description of this procedure.
10. To change the task planned start time, select a new time from the Start hours and minutes drop-down lists.
11. To change the task end date, select a new date from the End drop-down list.

    See Using the Date Drop-down List, page 3-12 for a complete description of this procedure.
12. To change the task planned end time, select a new time from the End hours and minutes drop-down lists.
13. Tap **OK** to save the task.

    Tap **Cancel** to return to the SR screen without saving the task. See Viewing and Changing Service Request Information, page 3-27 for a complete description of the SR screen.

Creating a Personal Task

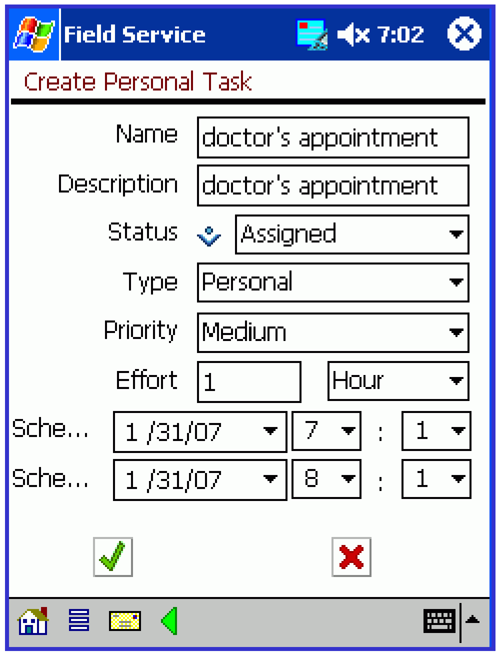
A *personal task* is a notice to the dispatcher that you will not be available for a particular period. A personal task is not dispatchable or tied to a service request, therefore making it different from a task that is loaded onto your Pocket PC. For example, if you need to go to the dentist next week, you can create a personal task stating that you will be unavailable to service tasks for a certain period. By knowing your availability, the dispatcher can better schedule your tasks.

To create a personal task, complete the following steps:

Steps:

1. From the Task List screen, select Create Personal Task from the Goto menu.

Create Personal Task



2. Specify the desired information in the Create Task screen and then tap **OK**.

   See Creating a Task, page 3-25 for a complete description of this procedure.

Working with Service Requests

A service request is created when a customer contacts your organization with a problem. Typically, the customer representative analyzes the service request and assigns a task or tasks to it. Then the service request, along with all related information and tasks, are sent to the field service technician. You can view the summary details of a service request in the Task List screen. See Understanding the Task List Screen, page 3-9 for a complete description of this procedure.

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

Viewing and Changing Service Request Information:

Prerequisites

Opening a task from the Task List screen. See "Working with Your Task List", page 3-8

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

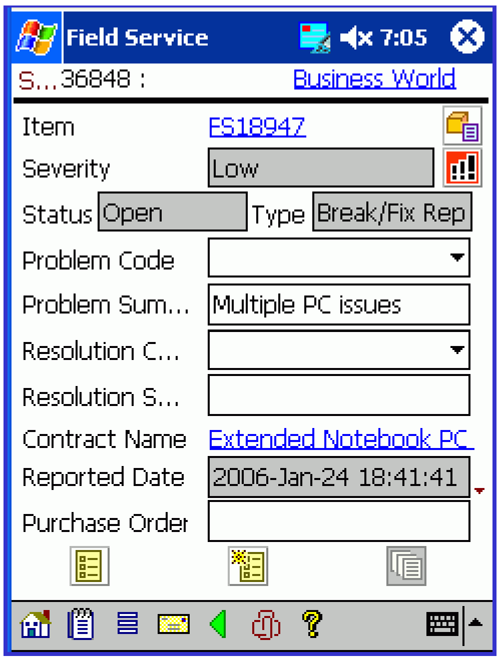
1. Navigate to the Task List screen and tap the desired task.

   The Task screen opens. See "Viewing and Changing Task Information", page 3-13 for a complete description of this screen.

2. Tap **SR**.

   The SR screen opens.

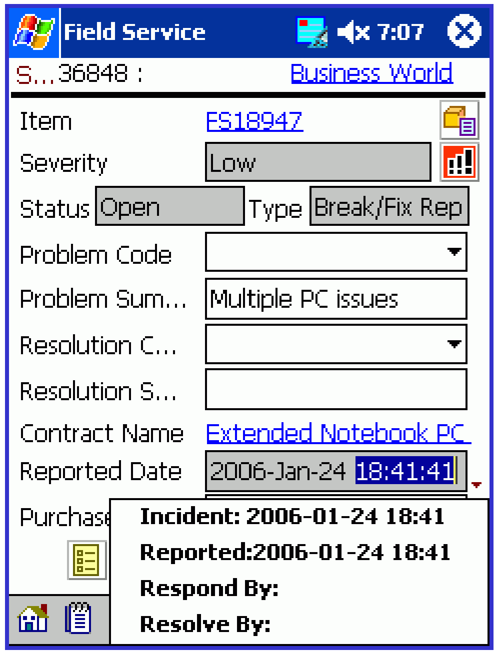
Service Request



3. Tap the Reported Date field.

   The incident, reported, respond by, and resolve by dates and times appear. The home office determines these dates and times and they cannot be changed.

Service Request



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

Read-only Information	Description
Service request number	Located in the screen title, this is a generated number for a service request.
For field	The name of the customer. Tap this field to open the Customer screen where you can view additional customer information. See "Viewing Customer Information", page 3-76 for a complete description of this procedure.
Product field	The name of the customer product that needs service. Tap this field to view additional customer product information. See "Viewing Customer Product Information", page 3-81 for a complete description of this procedure.
Severity	The urgency of the service request.

Read-only Information	Description
Reported Date	The date that the incident was reported.
Contract field	The name of the customer contract. Tap this field to view additional contract information. See "Viewing Contract Information", page 3-32 for a complete description of this procedure.
Status drop-down list	The current status of the service request.
Type drop-down list	The type of service request.

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

   The Products screen opens. See "Viewing and Changing a Customer Product for a Task", page 3-82 for a complete description of this procedure.

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

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

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

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

   See "Creating and Viewing a Note", page 3-41 for a complete description of this procedure.

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

   The Service Request screen opens.

Additional Information

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

> **Note:** The home office determines the service request flexfields and they cannot be changed or created in the field. This includes whether a field is read-only or not.

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

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

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

    The All Tasks for SR screen opens. In this screen, you can view all the tasks for the service request. See "Viewing All Tasks for a Service Request", page 3-34 for a complete description of this procedure.

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

    The Create Task screen opens. Use this screen to create a task. See "Creating a Task", page 3-25 for a complete description of this procedure.

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

    The SR History screen opens. Use this screen to view the service request history. See

"Viewing Service Request History", page 3-35 for a complete description of this procedure.

Viewing a Service Request Attachment:

From the SR screen, you can open and view any attachment associated with a service request. The attachment can be of any type such as, a .pdf, .doc, .xls, .gif.

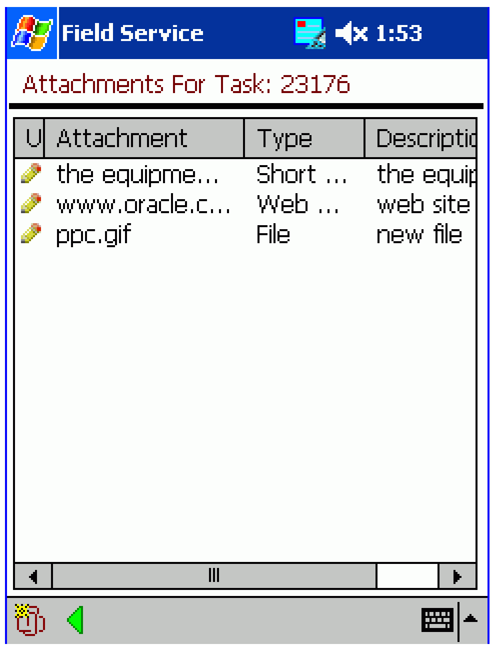
1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information", page 3-27 for a complete description of this procedure.

2. Tap the attachment icon at the bottom of the screen.

   The Attachments screen opens, displaying the attachment file name, size, and description.

Attachments For Task



3. Tap the file that you want to open.

   The selected file opens.

   Tape **Done** to return to the SR screen.

Viewing Contract Information:

Before performing a job, a field service technician should have as many details about the customer and task as possible. Part of these details is the contractual information.

The field service technician uses this information to determine the following:

- Customer entitlements
- Service coverage

Complete the following steps to view contract information:

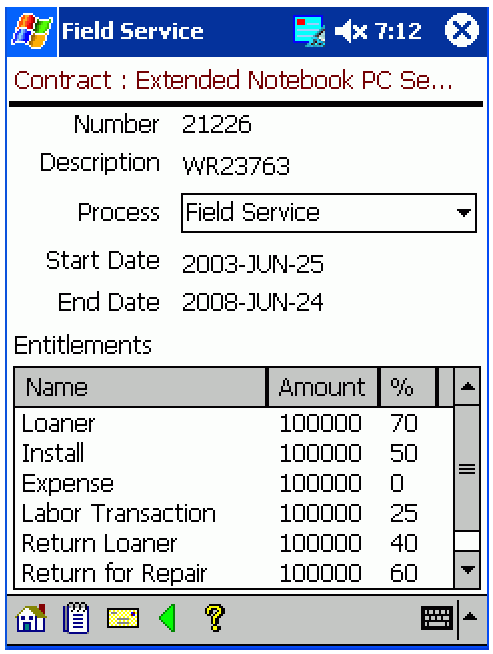
1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information", page 3-27 for a complete description of this procedure.

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

   The Contract screen opens.

Contract



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

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

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

3. To change the business process, open the Process drop-down list and make the appropriate selection.

4. In the lower portion of the Contract screen, tap the note icon to view or add a contract note.

   See Creating and Viewing a Note, page 3-41 for a complete description of this procedure.

5. Tap the complete icon in the lower portion of the screen to save any changes and return to the Task screen.

Viewing All Tasks for a Service Request:

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

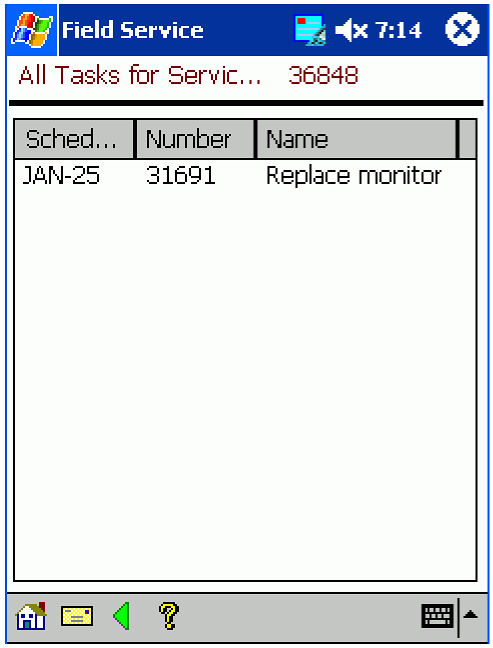
1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information", page 3-27 for a complete description of this procedure.

2. Tap **All Tasks**.

   The All Tasks for Service Request screen opens.

All Task for Service Request



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

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

   The Task screen opens. See Viewing and Changing Task Information, page 3-13 for a complete description of this screen.

4. Tap the global arrow icon in the lower portion of the Task List screen to return to the SR screen. See Using Global Functionality, page 3-5 for complete details.

Viewing Service Request History:

To best serve the customer, the field service technician should review the customer's service history prior to making a customer visit. Oracle Mobile Field Service/Pocket PC can provide you with service history for either a customer or a customer product. Only tasks and service requests that are closed or completed appear in the service history. In customer setup the administrator determines the amount of service history to gather for a customer. The administrator determines how many service requests will be used to create the service history. For example, the last three service requests may be compiled to create the service history.

Complete the following steps to view service request history:

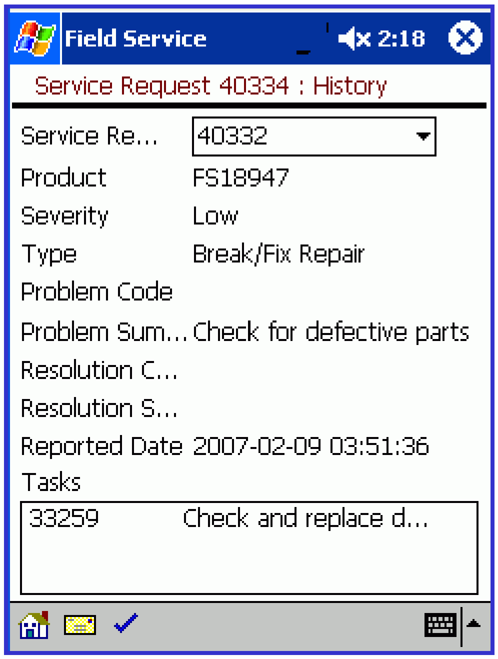
1. Navigate to the SR screen.

See "Viewing and Changing Service Request Information", page 3-27 for a complete description of this procedure.

2. Tap **SR History**.

   The SR History screen opens.

Service Request History



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

Read-only Fields	Description
Summary	A brief description of the service request.
Intake Date	The date that the service request was taken.
Type	The service request type.
Severity	The level of severity for the service request.
Problem	The problem to be fixed.
Resolution	The state of the service request resolution.

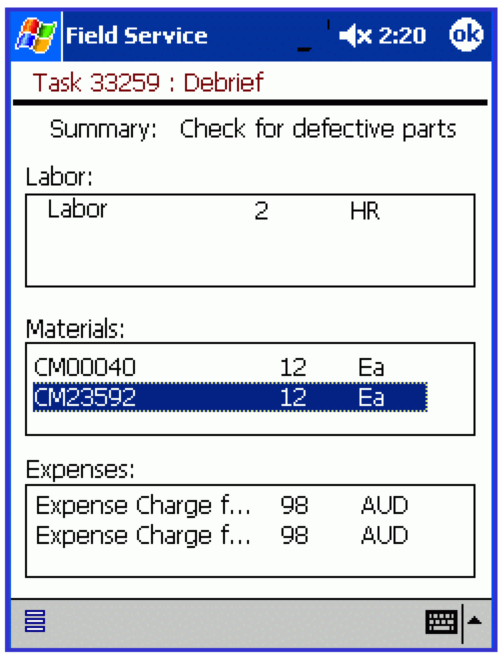
Read-only Fields	Description
Product	The Oracle Mobile Field Service/Pocket PC-generated product code.
Tasks table	Task(s) associated with the service request.

3. To change the service request number, make the appropriate selection from the SR Number drop-down list.

4. Tap the task in the Tasks table to learn more about the task.

   The Task Debrief screen opens, displaying read-only debrief information about the selected task. For additional details about this screen and how to view reports, see "Debrief Reporting", page 3-45.

Task Debrief



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

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

Creating a Service Request:

You can create a service request for each of the following scenarios:

- Without having any product information
- With a system item
- With a known customer product (install base)

Complete the following steps to create a service request:

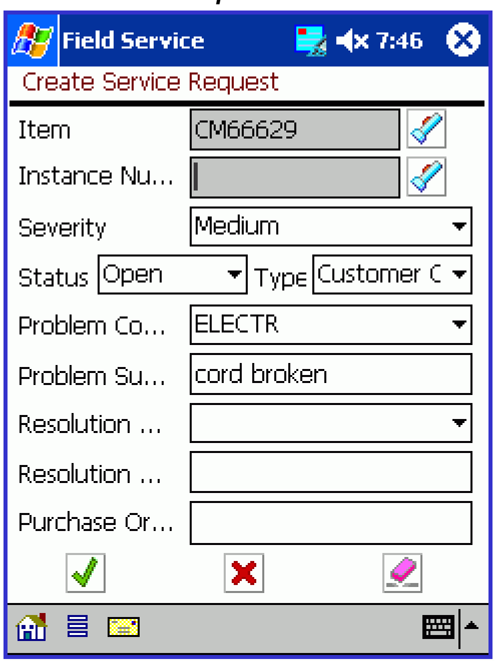
1. Navigate to the Customer screen.

   See "Viewing Customer Information", page 3-76 for a complete description of this procedure.

2. Tap **Create SR**.

   The Create Service Request screen opens.

   Create Service Request

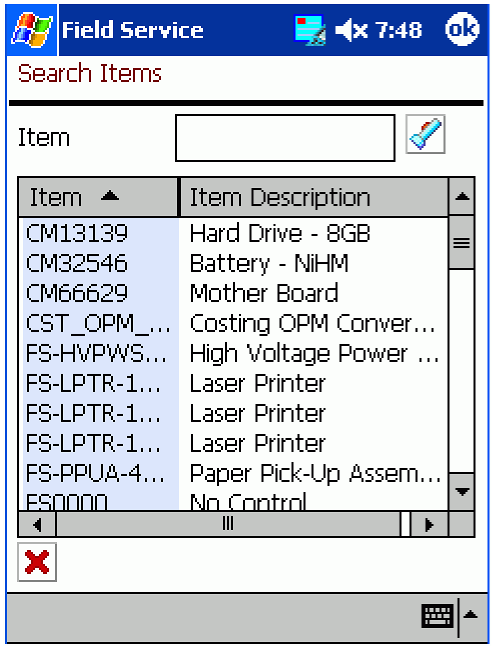
3. In the Summary field, enter a brief description for the service request.

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

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

   The Search Items screen opens listing items and their descriptions in a table.

Search Items



5. Tap the desired item.

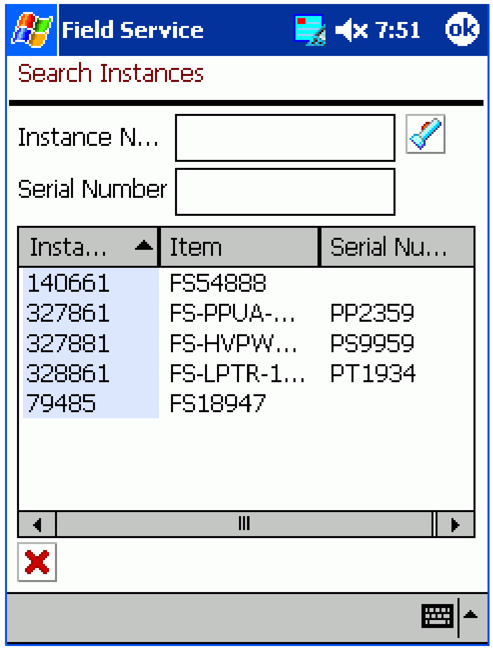
   Oracle Mobile Field Service/Pocket PC returns you to the Create SR screen.

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

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

   The Search Instances screen opens listing instances, items, and their descriptions in a table.

Search Instances



7. Tap the desired item.

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

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

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

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

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

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

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

13. Tap **OK** to save the service request.

    Tap **Cancel** to return to the Customer screen without saving the service request. See "Viewing Customer Information", page 3-76 for a complete description of the Customer screen.

    Tap **Clear** to clear the contents of the Create SR screen without saving the service request and to start over.

Creating and Viewing a Note

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

You can create and view notes for the following:

- Service request
- Task
- Customer
- Customer product
- Contract

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

A note includes the following:

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

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

Steps:

Complete the following steps to view or add a note:

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

     See "Viewing and Changing Service Request Information", page 3-27 for a complete description of this procedure.

- For a task note, navigate to the Task screen.

  See "Viewing and Changing Task Information", page 3-13 for a complete description of this procedure.

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

  See "Viewing Customer Product Information", page 3-81 for a complete description of this procedure.

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

  See "Viewing Customer Product Information", page 3-81 for a complete description of this procedure.

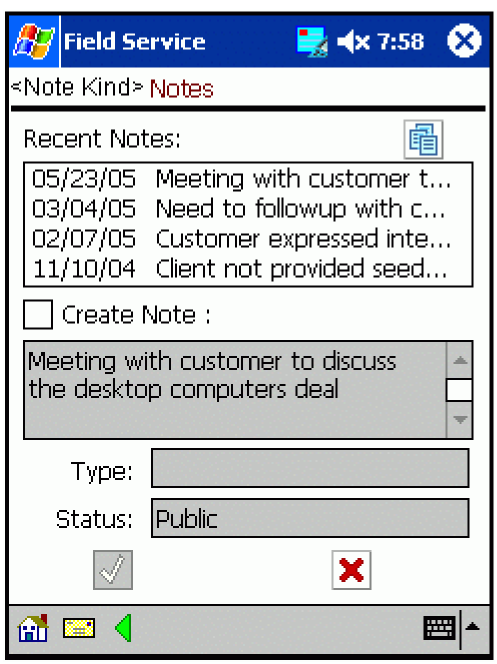
- For a contract note, navigate to the Contract screen.

  See "Viewing Contract Information", page 3-32 for a complete description of this procedure.

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

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

Notes



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

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

4. Enter the note text in the note field.

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

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

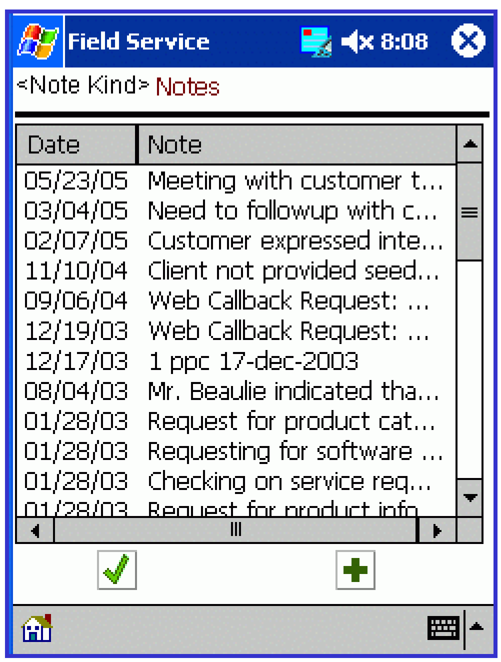
7. Tap **OK**.

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

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

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

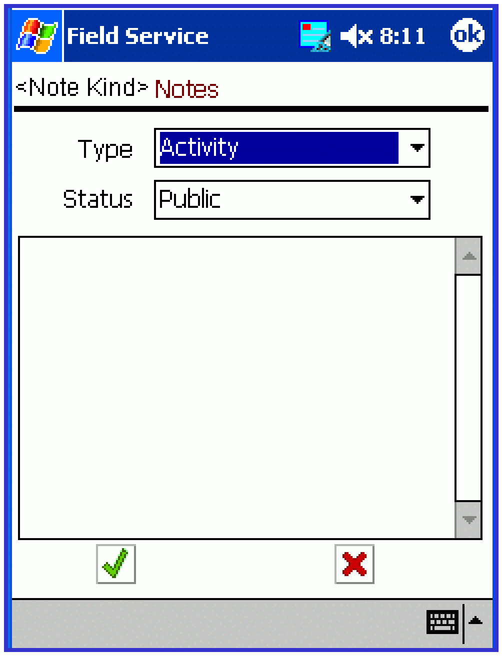
Notes - Show All



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

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

Notes - Adding



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

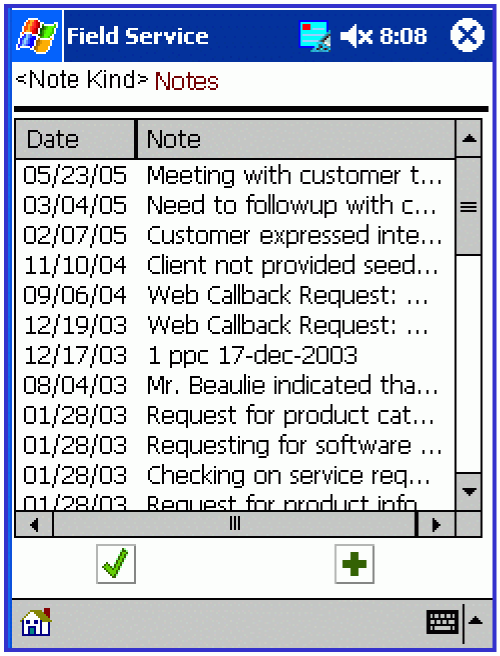
11. If you are not satisfied with the default note status, then make the appropriate selection from the Status drop-down list.

12. Enter the note text in the note field.

13. Tap **Save.**

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

Notes - Show All

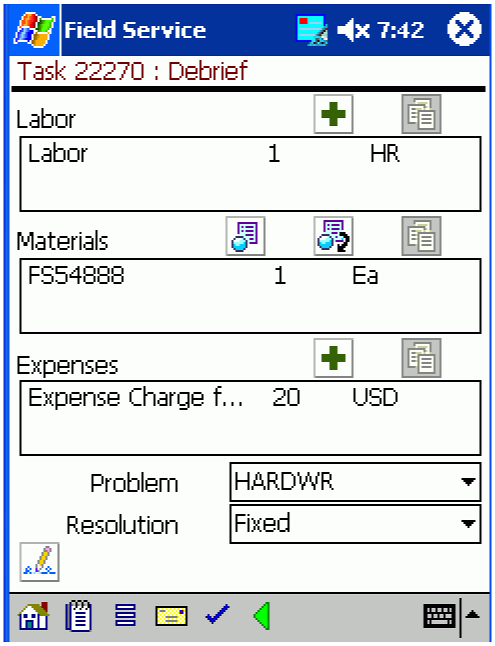


14. Tap **Done** to return to either the SR Notes, Task Notes, Customer Notes, Product Notes or Contract Notes screen, depending on the type of note that you are creating.

    Tap **Add** to add another note.

Performing Debrief Reporting

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



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

- Labor: Describes how much labor a task took to complete.
- Materials: Describes the materials that were involved in the completion of a task. This includes both replacement and recovered parts. The home office uses this information to replenish part inventories.
- Expenses: Describes the expenses that were required to complete a task.

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

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

Creating a Labor Report Item:

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

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

   The Task screen opens. See "Viewing and Changing Task Information", page 3-13

for a complete description of this screen.

2. Tap **Debrief**.

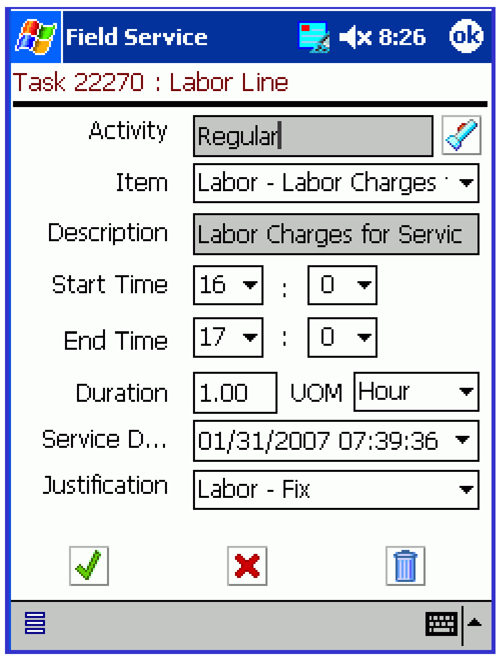
   The Debrief screen opens. See "Debrief Reporting", page 3-45 for a description of this screen.

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

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

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

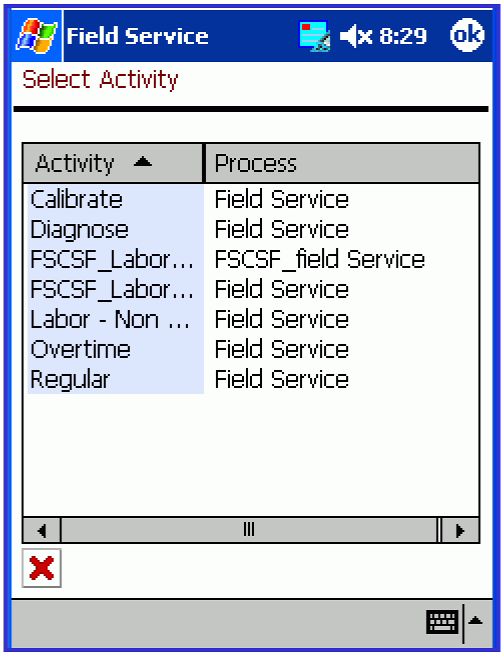
Labor Line



4. Tap the **Activity** flashlight icon to specify the labor activity.

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

Select Activity



5. Select a labor activity.

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

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

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

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

   See "Using the Date Drop-down List", page 3-12 for complete details.

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

   The hour values are depicted in the 24-hour clock format. If you are selecting a time after 12:00 P.M., add twelve to the hour to get the 24-hour clock equivalent. For example, 4:30 P.M. would be entered as 16 hours and 30 minutes.

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

   Again, the hour values are depicted in the 24-hour clock format.

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

11. From the UOM drop-down list, select the unit of time that describes the labor duration.

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

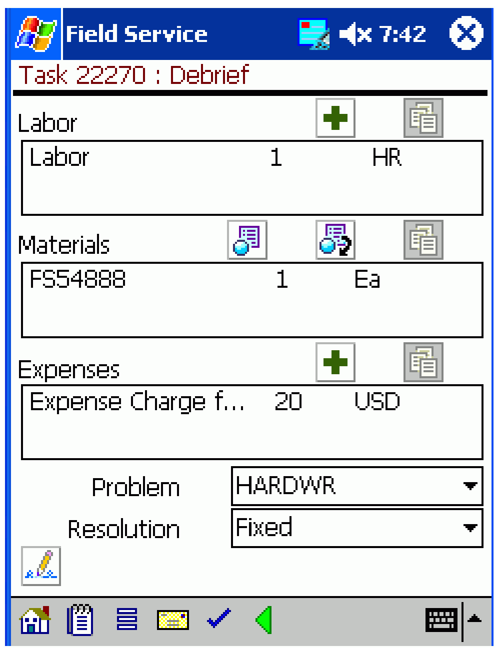
    It is not mandatory to complete the Justification drop-down list.

13. Tap **OK.**

    The Debrief screen opens. The labor report item along with the start and finish times appear on the screen.

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

Debrief



Deleting a Labor Report Item:

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

Prerequisite

- Creating a labor report item. See Creating a Labor Report Item, page 3-46.

Complete the following steps to delete a labor report item:

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

   See "Creating a Labor Report Item", page 3-46 for a complete description of this procedure.

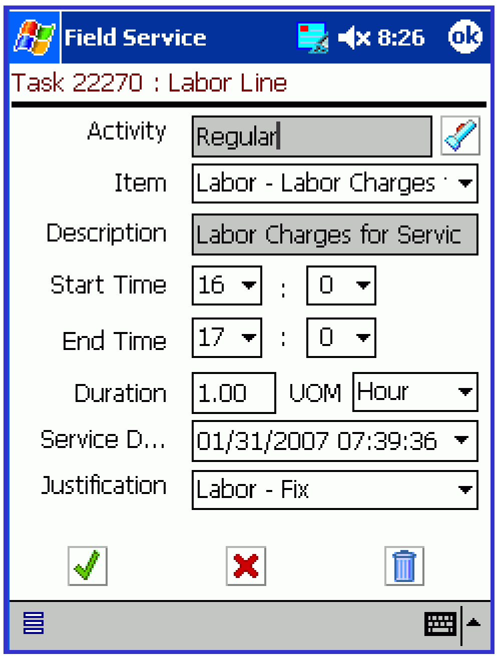
2. Select the desired labor report item in the Labor field.

   The Labor Line screen opens.

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

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

Labor Line



4. Tap **Delete.**

5. Oracle Mobile Field Service/Pocket PC returns you to the Debrief screen where the desired labor report item no longer appears.

Creating a Material Report Item:

After you complete a task, you can record the materials that were used in the completion of the task. The home office uses this information to replenish or replace needed materials, maintain the customers install base, and possibly invoice the customer for the materials used.

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

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

Creating a Material Report Item with a Pre-defined Parts List

Complete the following steps to create a material report item:

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

   The Task screen opens. See Viewing and Changing Task Information, page 3-13 for a complete description of this screen.

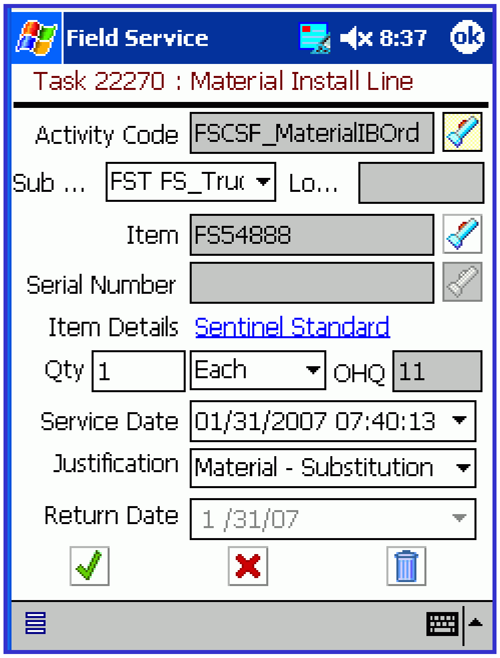
2. Tap **Debrief**.

   The Debrief screen opens. See Debrief Reporting, page 3-45 for a description of this screen.

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

   The first material item appears in the Material Line screen. The sub-inventory of the material item appears in the Sub Inventory drop-down list. The activity code associated with the service request incident type appears in the Activity Code field. If the activity code is blank, you can choose an activity code.

Material Install Line



4. Click **OK** to save the material item.

   If the material item is not in any of your subinventories, then an error message appears stating that no on hand quantity is available.

   Click **Cancel** to close the screen without saving the material item.

Creating a Regular Material Report Item

Complete the following steps to create a material report item:

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

   The Task screen opens. See Viewing and Changing Task Information, page 3-13 for a complete description of this screen.

2. Tap Debrief.

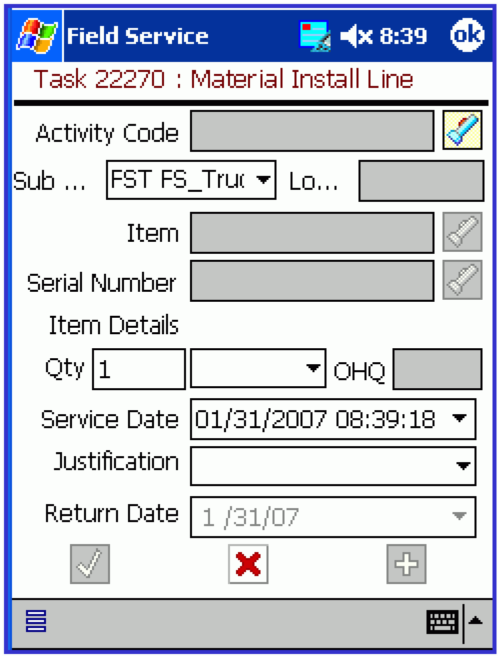
   The Debrief screen opens. See Debrief Reporting, page 3-45 for a description of this screen.

3. Tap Install above the Materials field.

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

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

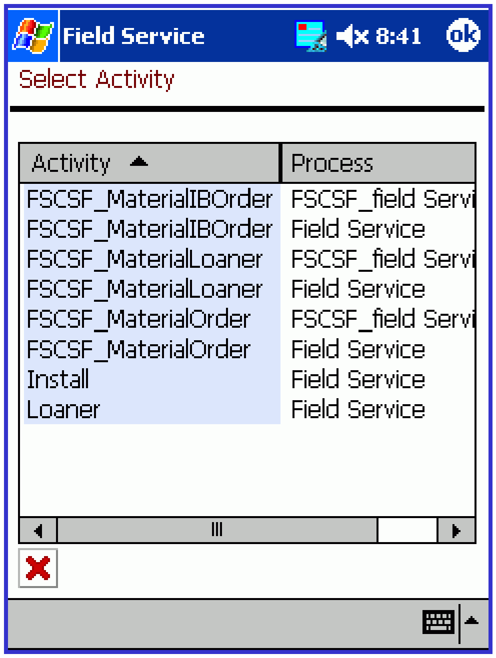
Material Install Line



4. Tap the Activity Code flashlight icon to specify the material activity.

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

Select Activity



5. Select a material activity.

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

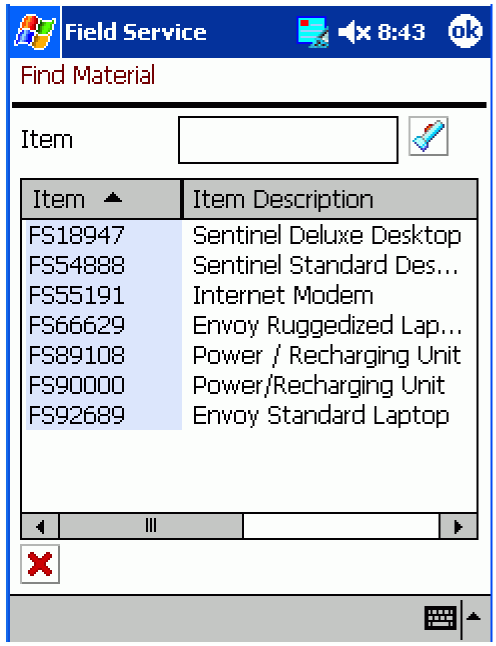
6. Select a material report item using one of the following methods:

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

     - Tap Find.

       The Find Material screen opens listing material names and descriptions in a table.

Find Material



- Select the desired material report item.

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

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

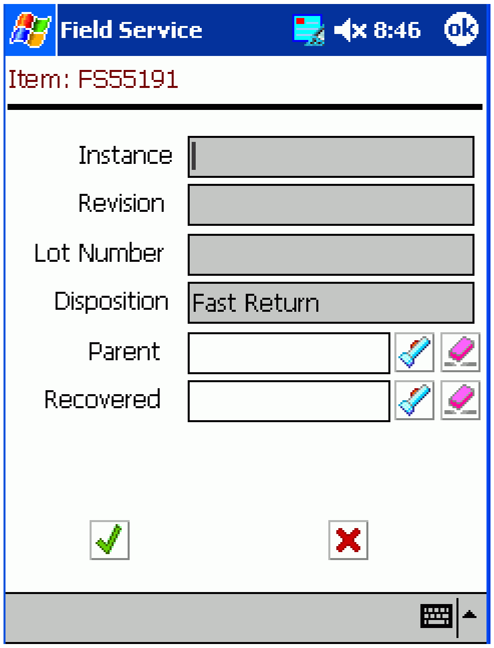
7. To change the default inventory, make the appropriate selection from the In drop-down list.

8. Enter the number of items needed in the Quantity field.

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

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

Item Details



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

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

    See Using the Date Drop-down List, page 3-12 for a complete description of this procedure.

12. From the Justification drop-down list, make a selection that best describes the justification for the material report item usage.

    It is not mandatory that you select a justification.

13. Tap **OK**.

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

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

Creating a Material Report Item for a Return

Complete the following steps to create a material report item:

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

The Task screen opens. See Viewing and Changing Task Information, page 3-13 for a complete description of this screen.

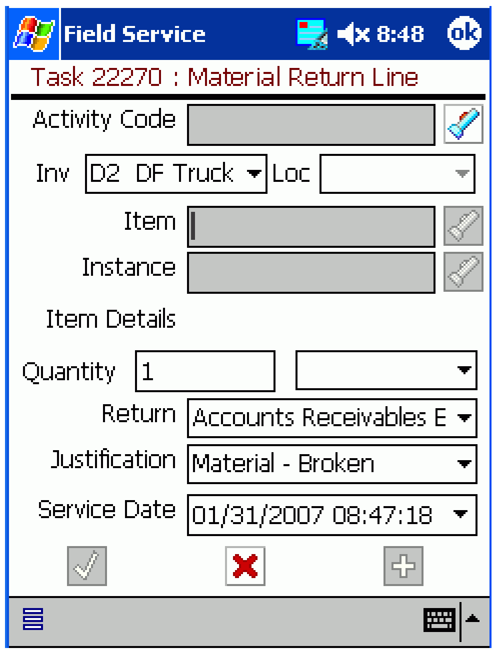
2. Tap **Debrief**.

   The Debrief screen opens. See Debrief Reporting, page 3-45 for a description of this screen.

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

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

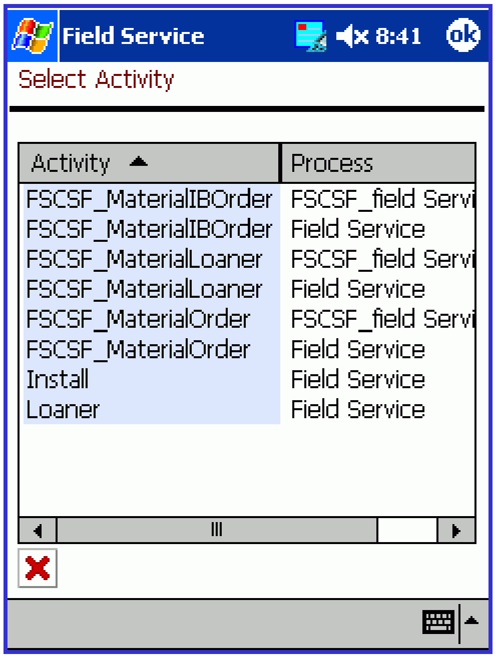
Material Return Line



4. Tap the **Activity Code** flashlight icon to specify the material activity.

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

Select Activity



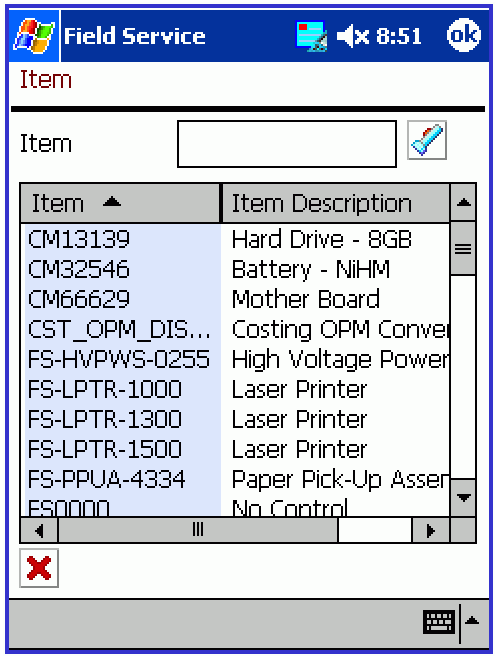
5. Select a material activity.

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

6. Tap the **Item** flashlight icon to select a material report item.

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

Item

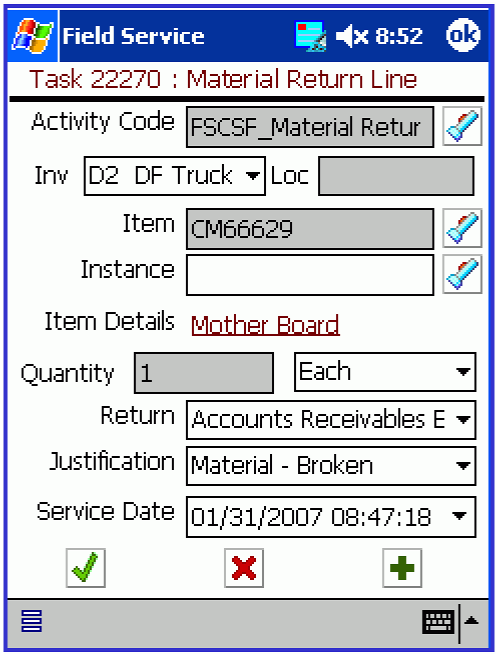


7. Select the desired material report item.

   If there are several material report items listed in the Item screen, you can access a specific material report item directly by entering information in the Item field or Serial Num field at the bottom of the screen. Then click **Go.**

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

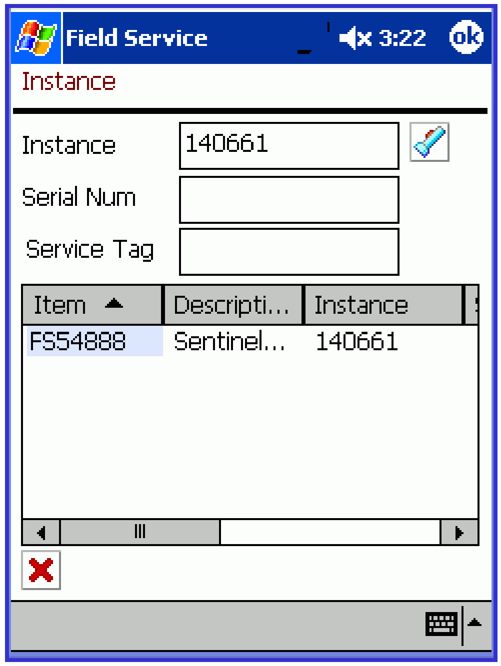
Material Return Line



8. To change the default instance value, tap the **Instance** flashlight icon.

   The Instance screen opens.

Instance



9. Select the appropriate item instance.

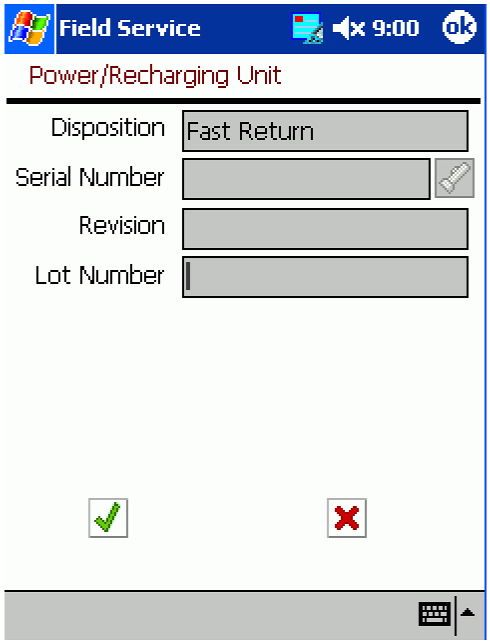
   The selected instance appears in the Instance field of the Material screen.

   If there are several instances listed in the Instance screen, you can access a specific instance directly by entering information in the Instance field or Serial Num field at the bottom of the screen. Then click **Go.**

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

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

Item Details



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

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

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

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

14. Tap **OK**.

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

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

Deleting a Material Report Item:

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

Complete the following steps to delete a material report item:

Prerequisite

Creating a material report item. See "Creating a Material Report Item", page 3-50.

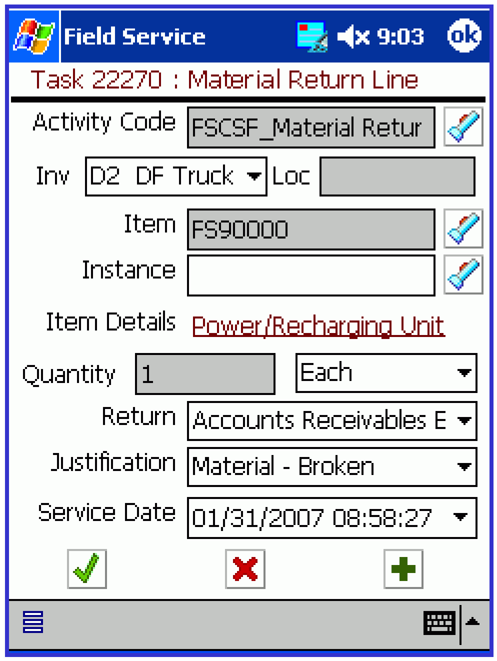
1. For a desired task, navigate to the Debrief screen.

   See "Creating a Material Report Item", page 3-50 for a complete description of this procedure.

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

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

Material Return Line



   If Oracle Mobile Field Service/Pocket PC is synchronized after the creation of the desired material report item, then the **Delete** button is not available in the Material Line screen or Material screen.

3. Tap **Delete.**

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

Creating an Expense Report Item:

After you complete a task, you can then enter information that describes the expenses associated with that task. Expenses may include such things as a meal and driving costs. Oracle Mobile Field Service/Pocket PC enables you to add expense report items regardless of the task status.

Complete the following steps to create an expense report:

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

   The Task screen opens. See "Viewing and Changing Task Information", page 3-13 for a complete description of this screen.

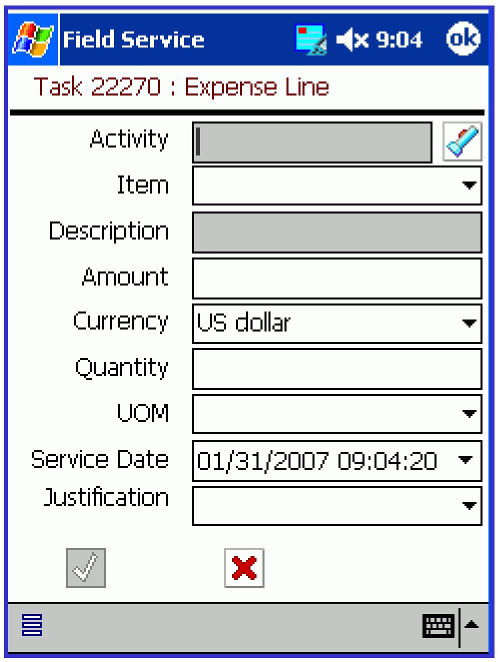
2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting", page 3-45 for a description of this screen.

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

   The Expense Line screen opens with the current date defaulting into the Service Date field.

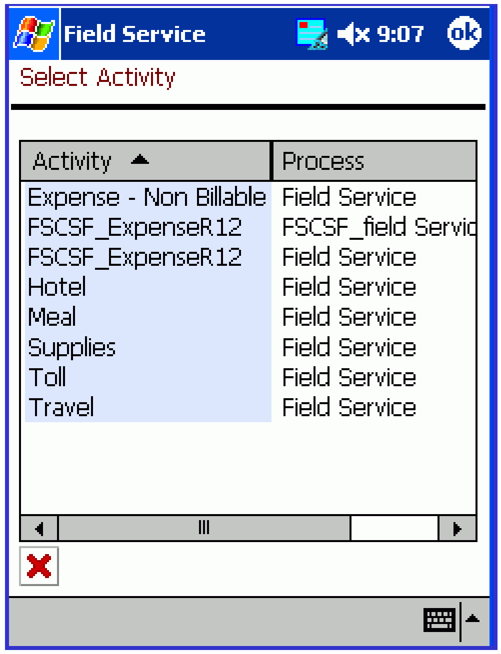
Expense Line



4. Tap the **Activity** flashlight icon.

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

Select Activity



5. Select an expense activity.

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

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

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

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

8. From the Currency drop-down list, specify the currency being used for the expense.

9. In the Quantity field, ener the quantity of items used to complete the service request.

10. From the UOM drop-down list, select the unit of measure being used.

11. If you are not satisfied with the date in the Service Date drop-down list, then change this selection.

12. From the Justification drop-down list, make a selection that best describes the

justification for the expense report item.

It is not mandatory to enter a justification.

13. Tap **OK**.

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

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

Deleting an Expense Report Item:

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

Prerequisite

- Creating an expense report item. See "Creating an Expense Report Item", page 3-63.

Complete the following steps to delete a expense report item:

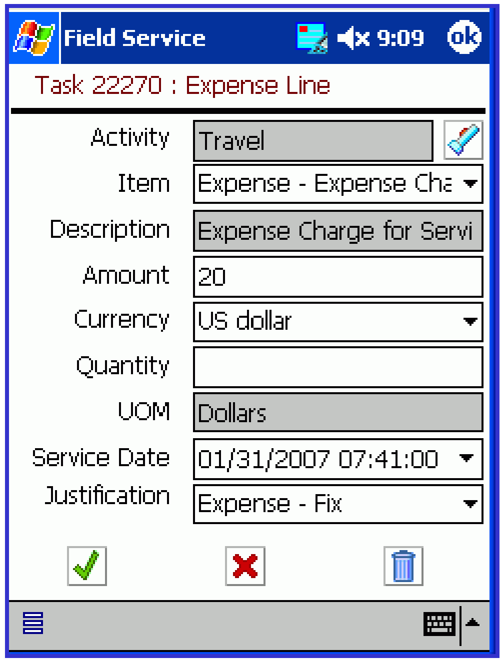
1. For a desired task, navigate to the Debrief screen.

   See "Creating a Material Report Item", page 3-50 for a complete description of this procedure.

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

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

Expense Line



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

3. Tap **Delete**.

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

Obtaining an Electronic Signature

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

Steps:

Complete the following steps to obtain an electronic signature:

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

   The Task screen opens. See "Viewing and Changing Task Information", page 3-13 for a complete description of this screen.

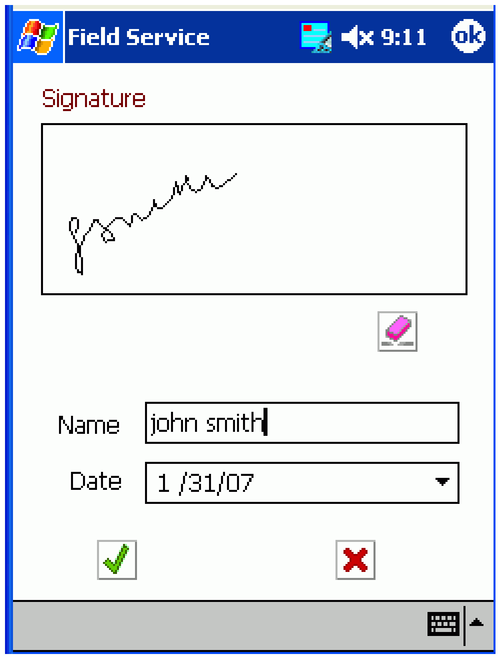
2. Tap **Debrief.**

The Debrief screen opens. See "Debrief Reporting", page 3-45 for a description of this screen.

3. Tap **Sign.**

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

Signature



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

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

5. If you are not satisfied with the customer name, then enter the customer name in the Name field.

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

   See Using the Date Drop-down List, page 3-12 for a complete description of this procedure.

7. Tap **OK.**

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

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

Counter Readings

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

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

A counter reading consists of the following:

- Name
- Time stamp
- Value
- Unit of measure

Creating a New Counter Reading:

Complete the following steps to set a counter reading:

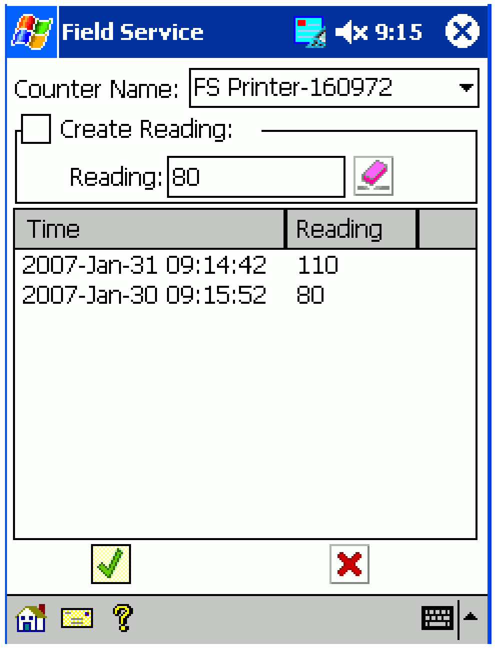
1. Navigate to the Task List screen and tap the desired task.

   The Task screen opens. See "Viewing and Changing Task Information", page 3-13 for a complete description of this screen.

2. Tap **Counters**.

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

Counters



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

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

4. Select the Create Reading check box.

   The Reading field is available.

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

   The counter reading appears in the table.

   > **Note:** Depending on how you define the counters, you might have to enter a reading that is either less than or greater than the last counter reading. You can also define the counters with no restrictions.

Managing Spare Parts

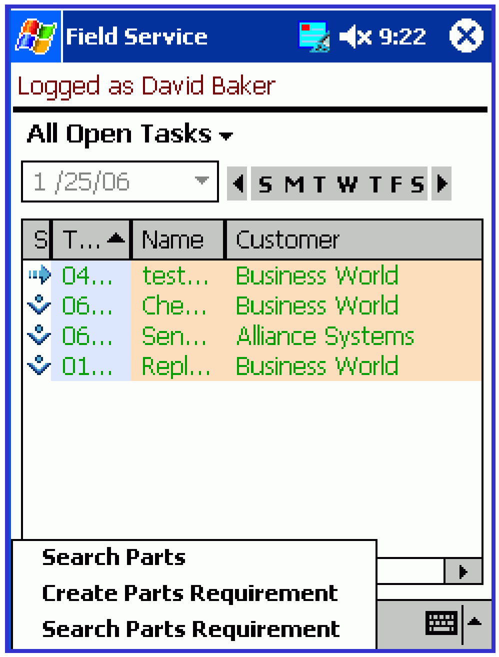
Spare parts management includes creating a parts requirement and viewing the parts requirement status.

Creating a Parts Requirement:

Complete the following steps to order a part:

1. From the Task List screen, tap the parts icon.

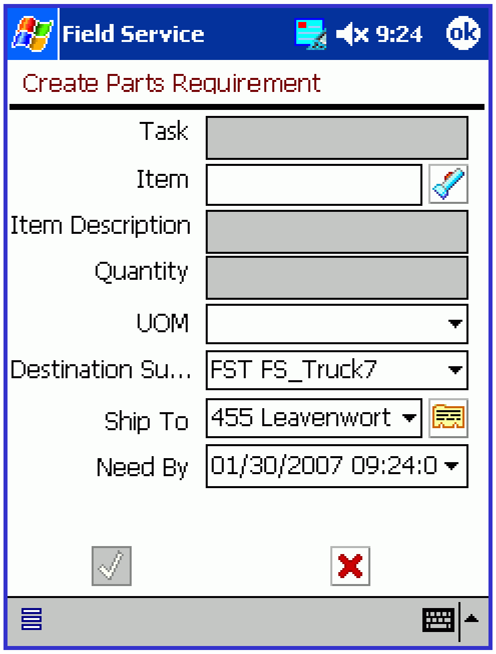
All Open Tasks



2. From the Goto menu, select **Create Parts Requirement**.

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

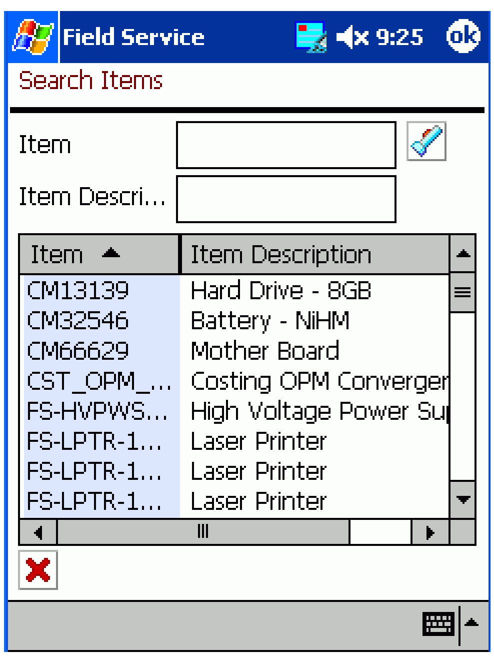
Create Parts Requirement



3. Tap the **Item** flashlight icon.

   The Parts Search window opens.

Search Items

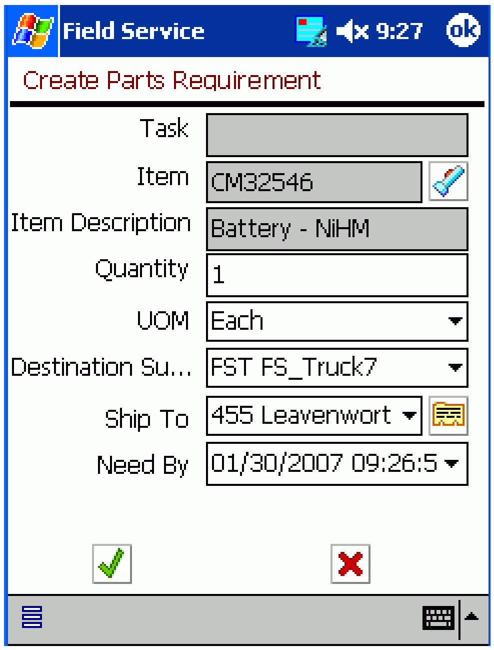


4. Select the desired part from the table.

   If you know the information for a specific part, you can enter this in the Part Number field or Description field at the top of the screen. You can then make your selection from the table.

   The part you select appears in the New Order screen.

Create Parts Requirement



5. Tap **Order**.

   A message appears stating the requirement number and prompting you to continue. You will want to remember this part number in case you want to reference the part order status in the future.

6. Tap **OK** in the prompt.

   The part you selected is added to the part order. Oracle Mobile Field Service/Pocket PC enables you to check the status of this order. See "Viewing Parts Requirement Status", page 3-73 for a complete description of this procedure.

Viewing Parts Requirement Status:

After you create a parts requirement, you can view the parts requirement status.

Complete the following steps to view a parts requirement status:

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

The View Order screen opens.

View Order

2. To change the requirement number, make the appropriate selection from the View Order drop-down list.

3. To see the full shipping address, tap the equal sign **(=)** button.

   The Address screen opens.

4. Tap **Done** to close the Address screen.

5. Tap **OK** to close the View Order screen.

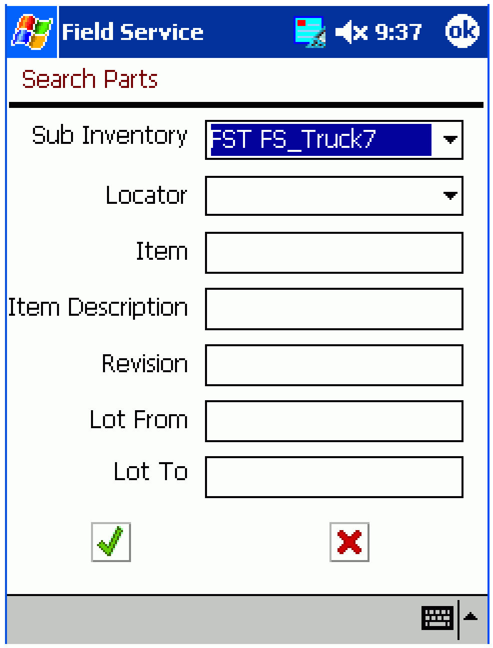
Viewing On-hand Parts and Quantities:

Complete the following steps to view on-hand parts and quantities:

1. From the Task List screen, tap the parts icon and then select **Search Parts** in the Goto menu.

   The Search Parts screen opens.

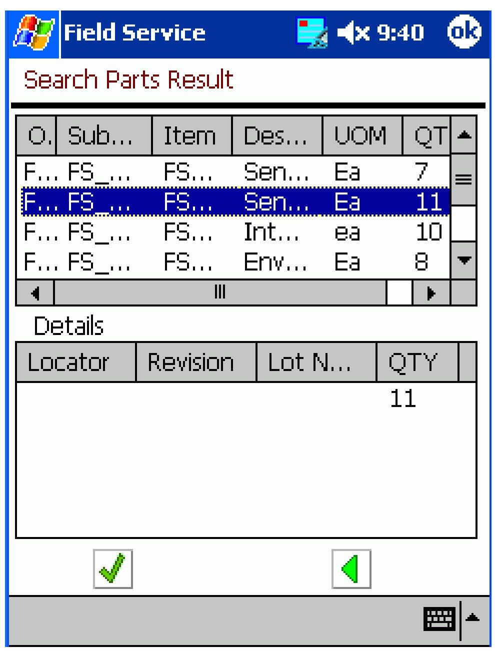
Search Parts



2. Enter the search criteria for the desired part and then tap **OK**.

   The Search Parts Result screen opens with the desired part information displayed.

Search Parts Result



3. Select the desired part and then tap **Done**.

   To locate another part, tap **Search** to return to the Parts Search screen.

Viewing Customer Information

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

- Name
- Contact
- Address
- Phone number

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

Steps:

Complete the following steps to view customer information:

1. Open the Customer screen.

   To Open the Customer Screen from within a Task:

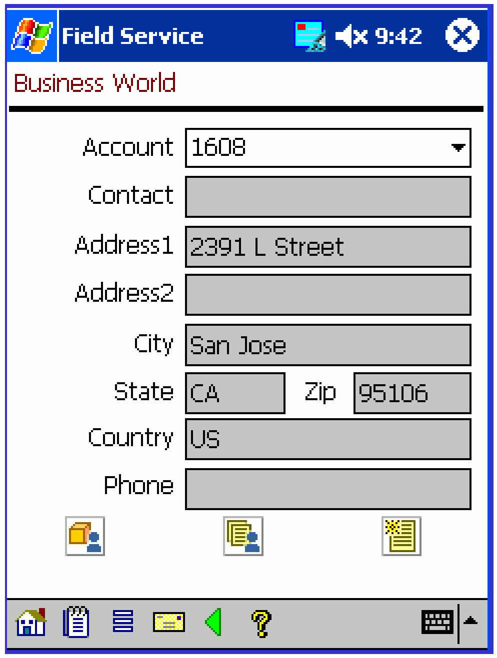
   1. From the Task List screen, tap the desired task.

      The Task screen opens. See "Viewing and Changing Task Information", page 3-13 for a complete description of this screen.

   2. Tap the Customer field.

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

Customer

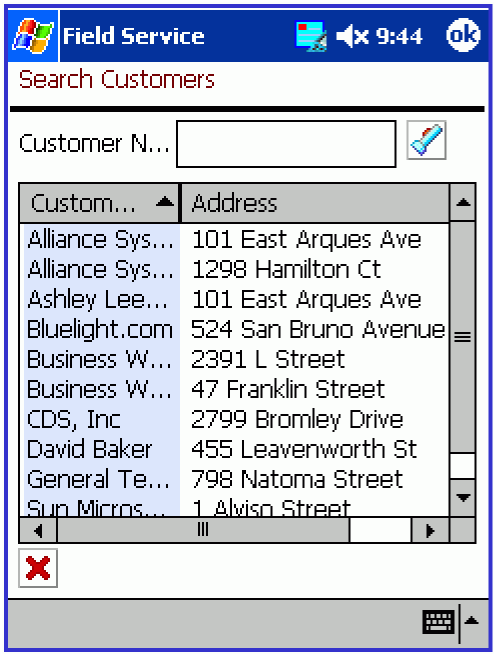


To Open the Customer Screen with no Task Open:

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

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

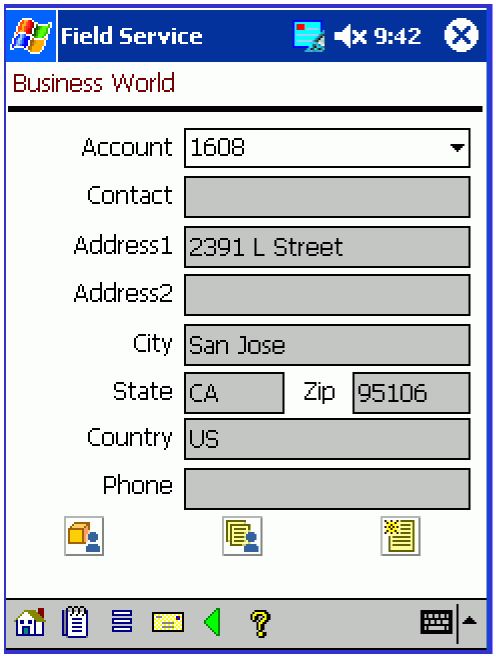
Search Customers



2. Tap the desired customer.

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

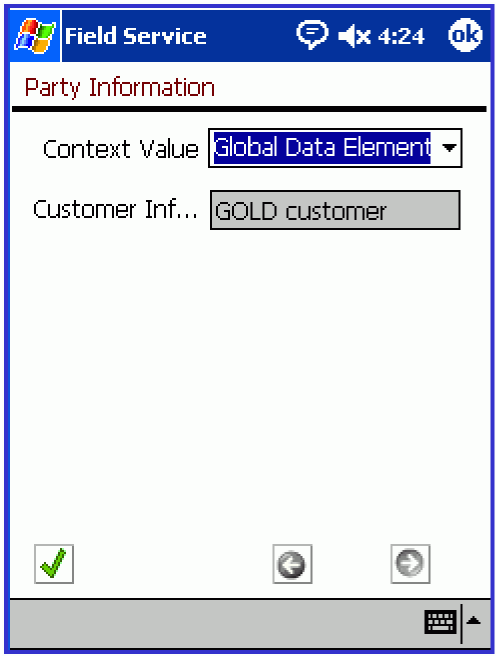
Customer



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

   The Party Information screen opens.

Party Information



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

> **Note:** The enterprise server level determines the customer flexfields, and they cannot be changed or created in the field. This includes whether a field is read-only or not.

3. Tap **OK**.

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

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

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

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

   See "Creating and Viewing a Note", page 3-41 for a complete description of this procedure.

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

   The All Products screen opens. In this screen, you can search for a customer product and then receive details about this product. See "Viewing Customer

Product Information", page 3-81 for a complete description of this procedure.

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

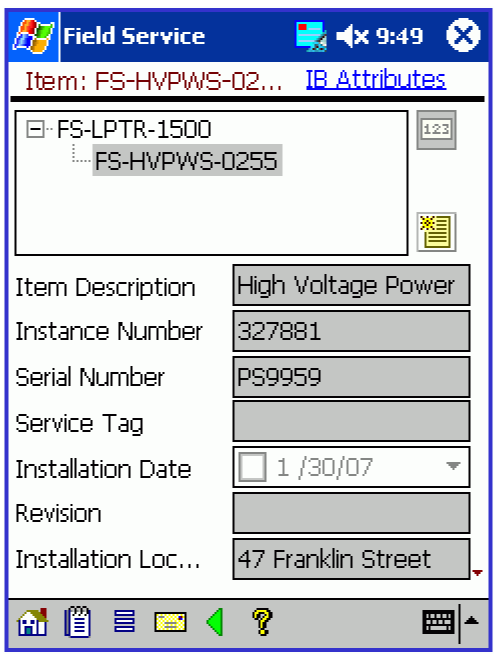
   The All SRs screen opens. In this screen, you can view all the service requests for a customer. See "Viewing All Tasks for a Service Request", page 3-34 for a complete description of this procedure.

7. To create a service request, tap **Create Service Requests**.

   The Create SR screen opens. In this screen, you create a service request by specifying various information. See "Creating a Service Request", page 3-37 for a complete description of this procedure.

Viewing Customer Product Information

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



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

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

Viewing and Changing a Customer Product for a Task:

Complete the following steps to view or change customer product information:

1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information", page 3-27 for a complete description of this procedure.

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

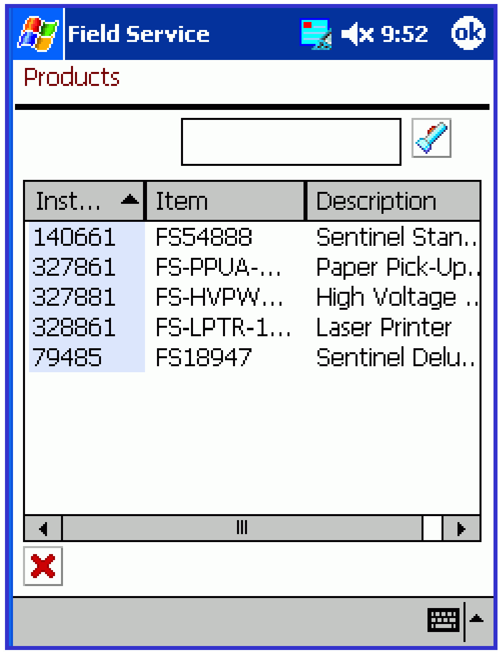
   The Customer Product screen opens, displaying a product description, number and serial number along with the installation date and any revision information.

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

4. To change the customer product, tap the flashlight icon near the Item field.

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

Products



5. Tap the desired customer product.

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

Viewing All Products for a Customer:

Complete the following steps to view customer product information:

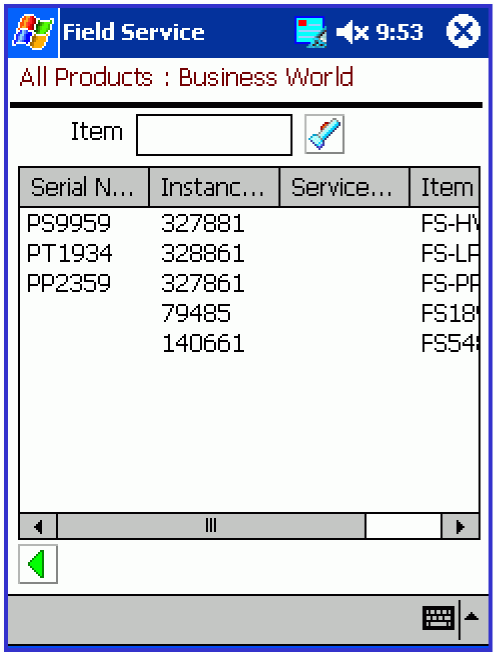
1. Navigate to the Customer screen.

   See "Viewing Customer Information", page 3-76 for a complete description of this procedure.

2. Tap **Products**.

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

All Products



3. Select the desired customer product.

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

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

Using Messaging

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

Messaging Functionality:

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

- It can be used to send messages to all field service users, or to members of a group to which the field service technician is a member.

- You can use this function to ask for support or to request additional information. For example, you can also use messages to request new parts.

After you synchronize, you can view any new messages in the Mail screen (inbox view). You can verify that a message you wrote has been sent by viewing it in the Mail screen (outbox view).

Reading, Sending, and Deleting Messages:

This section describes how to do the following:

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

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

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

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

   Mail

2. Select the message that you want to read.

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

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

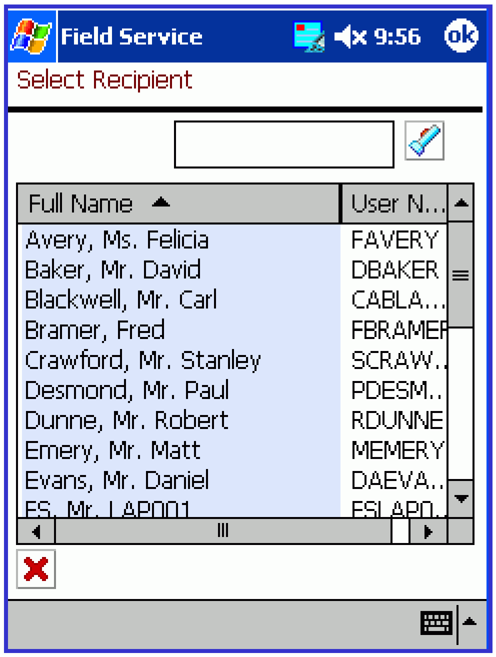
4. To create a new message, select the New Mail check box.

The user name appears in the From field.

5. Tap the **To** flashlight icon to select a recipient.

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

Select Recipient



6. Select the recipient from the table.

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

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

   The message is sent to the recipient.

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

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

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

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

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

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

Synchronizing with the Enterprise System

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

Steps:

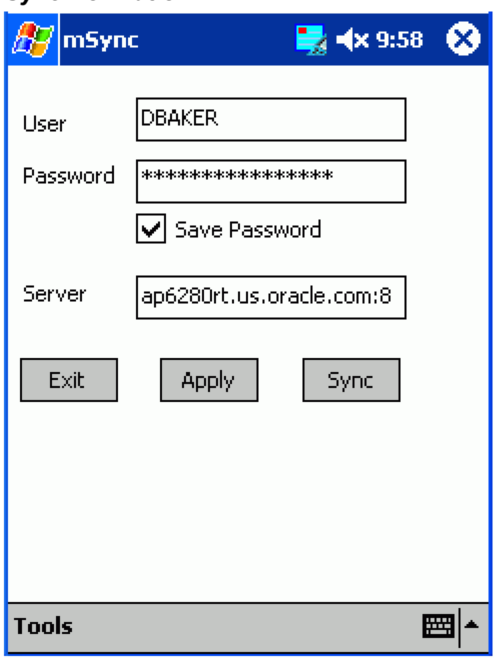
Complete the steps below to synchronize Oracle Mobile Field Service/Pocket PC with the enterprise system.

1. Establish a network connection for your Pocket PC.

2. Tap the synchronization icon near the bottom of the Task List screen.

   The synchronization screen opens.

Synchronization



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

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

Check box	Description
Save password	Select this check box to save the mSync user name and password.

4. Tap **Sync**.

   Information from your Pocket PC and enterprise system synchronize.

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

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

Closing the Application

When you have finished working in Oracle Mobile Field Service/Pocket PC, you will want to logout of the application.

Prerequisites

Save all data and be ready to exit the application.

Steps:

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

1. In the lower portion of the Task List screen, click the Exit icon from the tool bar.

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

Part 3

Oracle Mobile Field Service / Laptop

4

Installing Oracle Mobile Field Service / Laptop

This chapter describes what is required to install the Oracle Mobile Field Service / Laptop application. It also describes how to perform the initial launch and synchronization of the application.

This chapter covers the following topics:

- Minimum Hardware Requirements
- Minimum Software Requirements
- Installing the Software

Minimum Hardware Requirements

The following are the minimum hardware requirements necessary to run Oracle Mobile Field Service / Laptop:

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

Minimum Software Requirements

The following are the minimal software requirements necessary to run Oracle Mobile Field Service / Laptop:

- Operating System: Windows NT 4.0 (Service Pack 5), Windows 98, Windows 2000, Windows ME, or Windows XP
- Browser: Microsoft Internet Explorer, version 5.5 or later. This is the recommended browser for all Oracle HTML-based applications.

Installing the Software

This section describes how to install the Web-to-Go server and Oracle 10g Lite database, in addition to the Oracle Mobile Field Service/Laptop application. This additional software is necessary for Oracle Mobile Field Service/Laptop to operate.

Steps:

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

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

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

   For example: `http://130.35.88.214/setup`
3. Click the link to download the Mobile Client for Laptop setup program and save it.

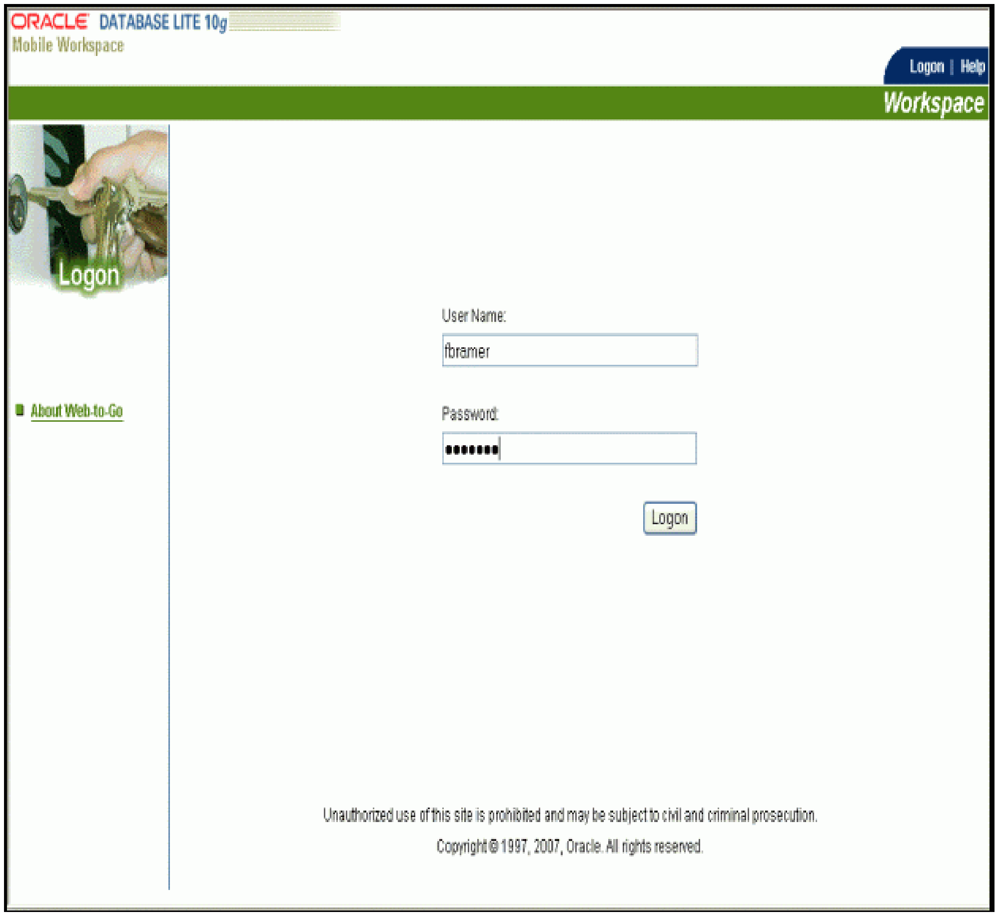
   If you are using Internet Explorer, right click with the mouse, choose the option Save target as, and then click OK. Choose a location to save the setup program and then click Save.
4. From Windows Explorer, double-click the `setup.exe` file that you just downloaded.

   Once started, the setup program prompts you to specify an install directory.
5. Provide the user name and respective password.
6. Choose an install directory.

   For example, `C:\mobileclient\ora_HOME` and then click OK. The setup program downloads all the required components. Once the installation is complete, your browser will launch. If the browser does not launch automatically, the setup program box will have the Web-to-Go URL displayed on it. For example, `http://my-laptop`. In this case, click the URL.

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

7. After the browser launches, log on using the same user name and password that you use for online applications.



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

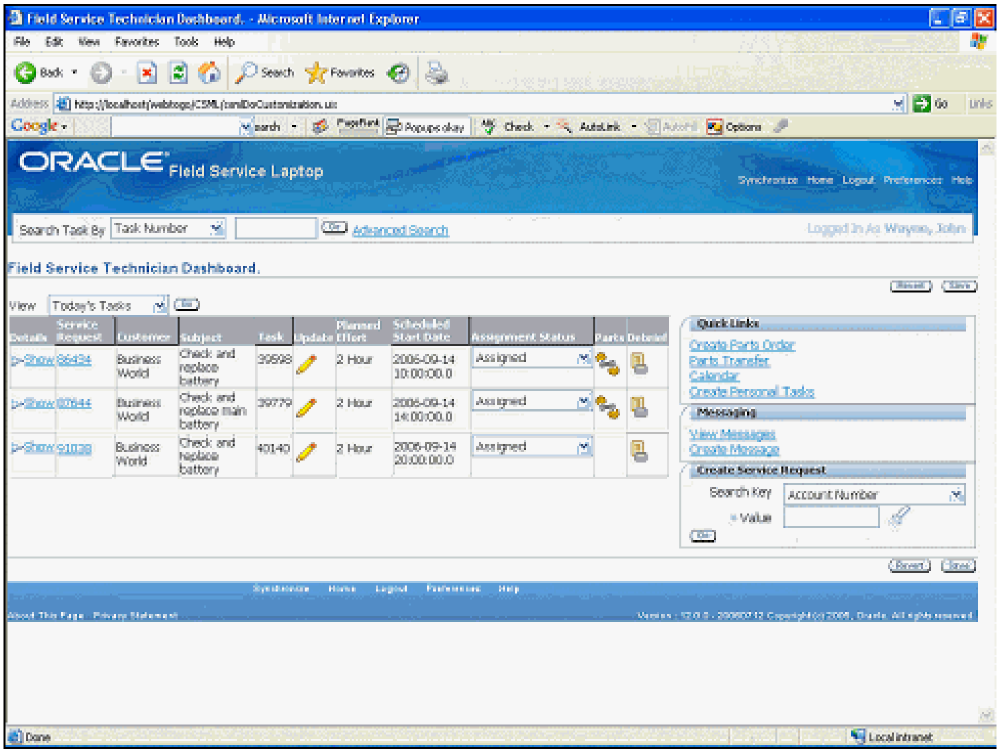
8. Click Go.

   The Oracle 10g Lite Client Initialization page opens.

9. Click Next.

   The Oracle 10g Lite Client Synchronization page opens. The initial synchronization downloads the application and your initial set of data. The synchronization takes several minutes; therefore, do not exit the browser until the synchronization is complete.

10. After synchronization is complete, the browser displays the Oracle Mobile Field Service/Laptop Dashboard.



To start Oracle Mobile Field Service/Laptop after installing the application, see Launching and Synchronizing Oracle Mobile Field Service / Laptop, page 5-3.

5

Using Oracle Mobile Field Service / Laptop

This chapter describes how to launch the application and synchronize with the enterprise system after the initial installation and startup.

This chapter covers the following topics:

- Viewing Contract Information
- Viewing Service History
- Viewing and Changing Service Request Information
- Task Creation
- Creating Task Based on Existing Task
- Creating Task Based on Existing Service Request
- Creating and Viewing Notes
- Setting Counters and Counter Properties
- Viewing a Service Request Attachment
- Uploading Attachments
- Logging Out

Introduction

The Oracle Field Service / Laptop application enables field service technicians to have access to information necessary for them to perform work at customer sites.

Technicians view their daily schedules of tasks, and perform many other functions, such as ordering parts, creating follow-up tasks, creating service requests, and accessing the Knowledge Base for potential solutions to common customer issues.

User Interface

The Field Service Laptop application provides a consistent user experience through a common look and feel with the Field Service Technician Portal, and through similar interaction behaviors.

User interface enhancements provide standards to ensure that when a user is searching for an asset in a financial application, or searching for a campaign in a marketing application, the search behaviors should not only look the same, but also function and interact the same. Not only should they look the same but they should also be able to specify the types of common interactions.

Multiple Responsibilities

Regardless of the responsibility associated with the user, the user can gain access to the Mobile Field Service application. The user's responsibilities do not need to be a seeded responsibility, but they do need to be a responsibility tied to the field service application.

When a single user is mapped to multiple responsibilities, and *all* those responsibilities are granted rights to access the Mobile Field Service application, then the user gains access to the Mobile application through the *oldest* responsibility through which the user gained access.

Multiple responsibilities features can be applied to fulfill the following needs:

- Assign a different transition task status to different responsibilities.

  The Task Status and Transition Rule are assigned to a specific responsibility. The business requirement of applying different rules for different field service users can be accomplished by creating new responsibilities and new rules, and then attaching them to each other.

- Customized menus

  The business requirement of restricting some functions provided in the Field Service Wireless menu, can be accomplished by creating a custom responsibility with certain restricted functions excluded.

  Example

  For example, if the Knowledge Base functionality should not be provided to specific users, then a custom Field Service Laptop responsibility can be created with that function excluded. Then this custom responsibility can be attached to specific users.

Launching and Synchronizing Oracle Mobile Field Service / Laptop

Complete the following steps to launch and synchronize Oracle Mobile Field Service / Laptop after the installation. To install the application, see Installing the Software, page 4-2.

Steps:

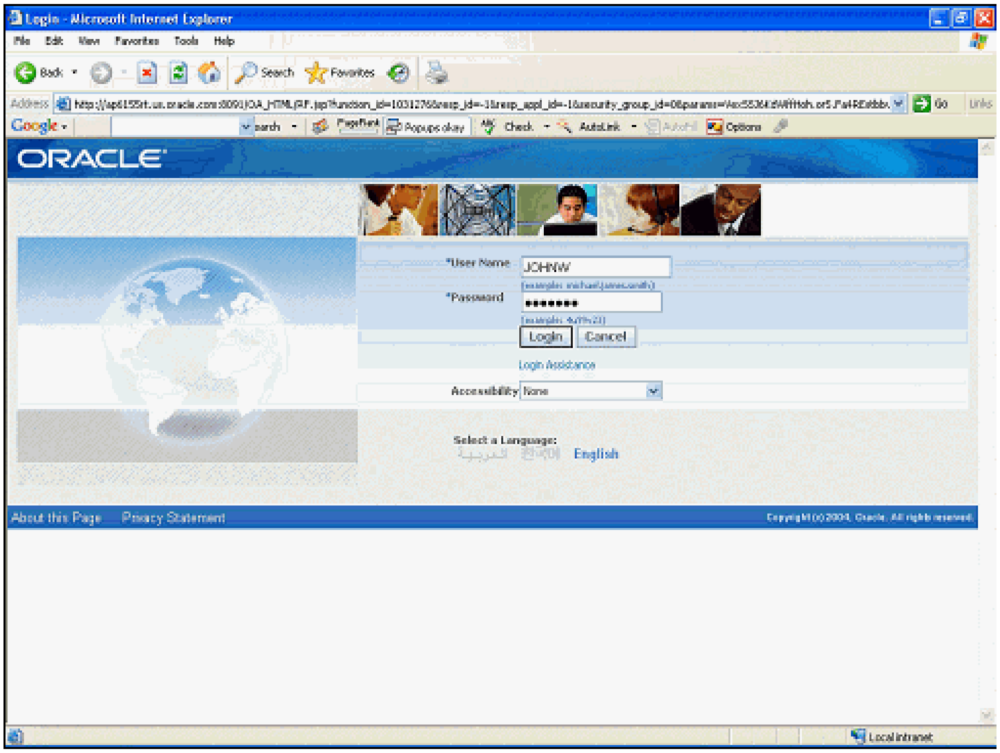
Launch Web-to-Go and the Mobile Field Service / Laptop Application

1. Choose `Start > Programs > Oracle Database Lite 10g > Web-to-Go`

   The Web-to-Go icon appears in the system tray. The system tray is located in the Windows task bar, usually at the bottom of the screen. The system tray contains the clock and miniature icons for easy access to system functions such as printer, modem, and volume control.

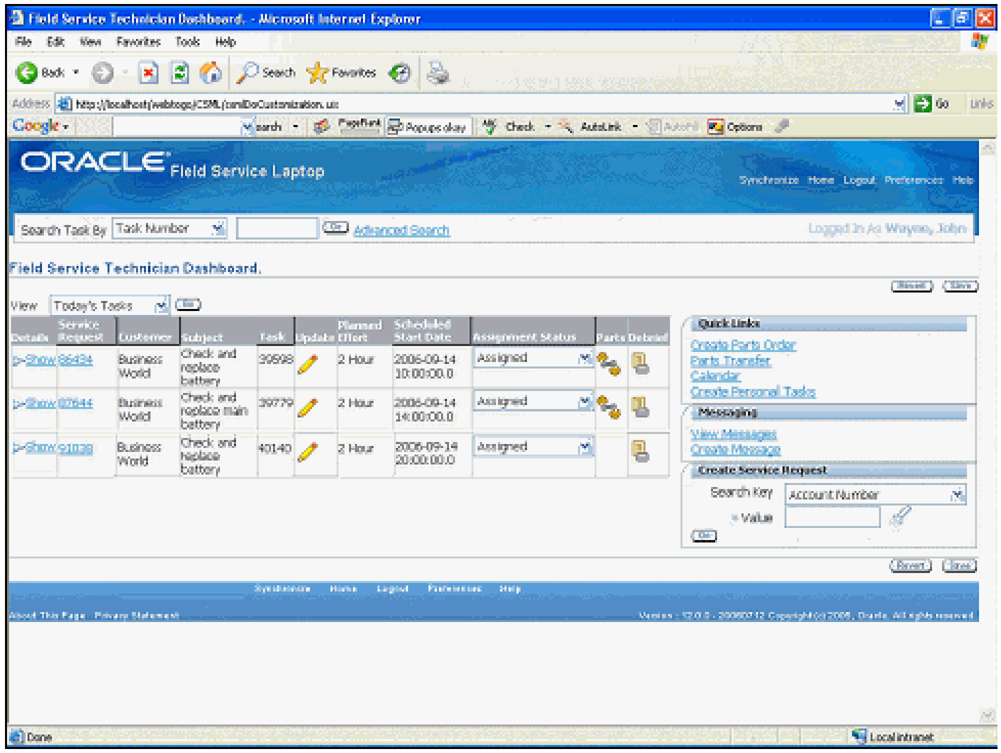
2. Double click the Web-to-Go icon in the system tray.

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



3. Enter your user name and password in the appropriate fields and then click Login.

   The Field Service Technician Dashboard opens. For a description of this page, see Field Service Technician Dashboard, page 5-5.



Synchronize with the Enterprise System

To receive new data that has been assigned to you, such as new tasks and service requests, you will need to synchronize with the enterprise system. Likewise, to send the changes that you make, such as creating debrief lines and updating task statuses, will need to be synchronized with the enterprise system.

4. Establish an internet connection for your laptop computer.

5. Click the Synchronize link located in the upper right corner of the page.

   The laptop computer will synchronize the information with the enterprise system.

   > **Caution:** Synchronizing data can take a few minutes; therefore, do not abort this process. If the synchronization process fails, contact your system administrator.

Field Service Technician Dashboard

The Oracle Mobile Field Service Laptop Field Service Technician Dashboard (Dashboard) serves as the point of entry for a field service technician.

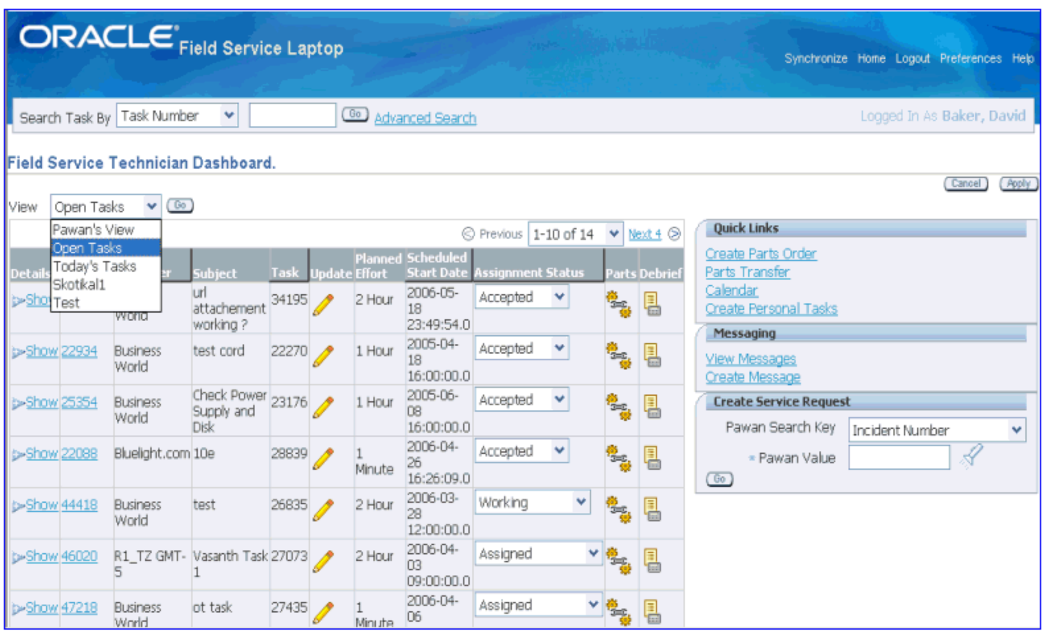
> **Important:** The Field Service Technician *Dashboard* provides a similar look and feel, and functions in the same way as does the Field Service Technician *Portal*, which is documented in the *Oracle Field Service User Guide*.

The Dashboard is divided into following components:

- Main View
- Search Area
- Quick Links
- Create Service Request
- Messaging

Main View

The Dashboard opens displaying the designated default main view of tasks assigned to the technician. The view defines which columns of information appear in the summary table, the column sequence, and the criteria for tasks to appear in the rows of the table.



Custom Views

The technician can select a different view, personalize a seeded or existing custom view, create a new custom view, or designate a different default view.

To access another view, select the different view from the View drop-down menu, and then click Go.

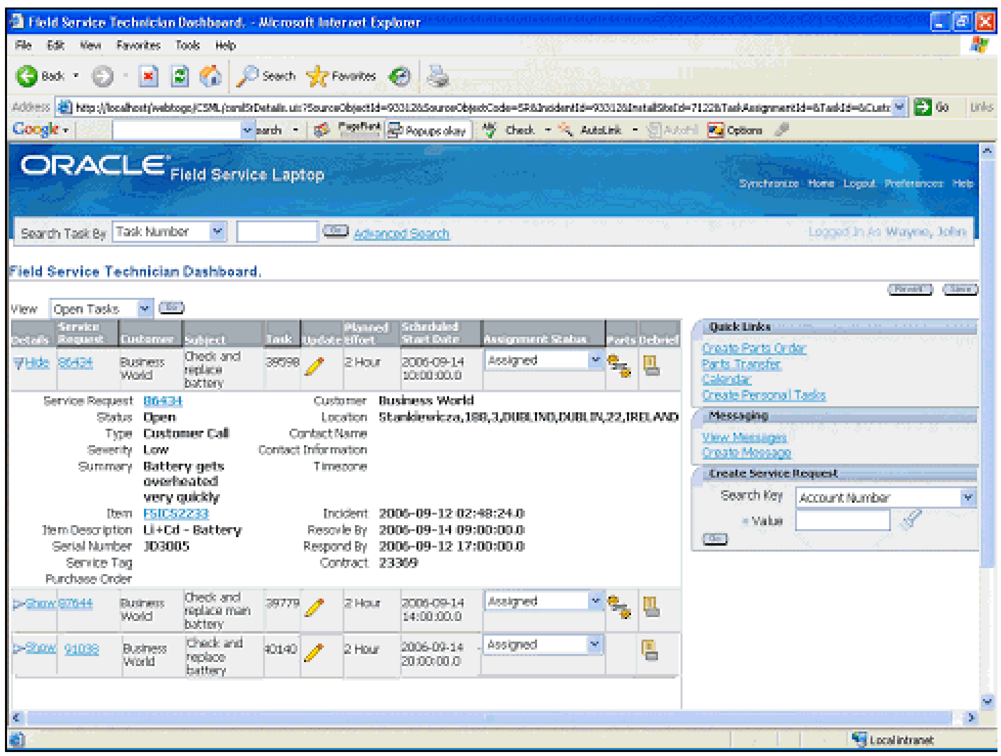
To personalize a seeded or existing custom view, create a custom view, or designate a different view as the default view, see Customizing Dashboard Views, page 5-11.

For more information about custom views, see Dashboard Customized Views, page 5-11.

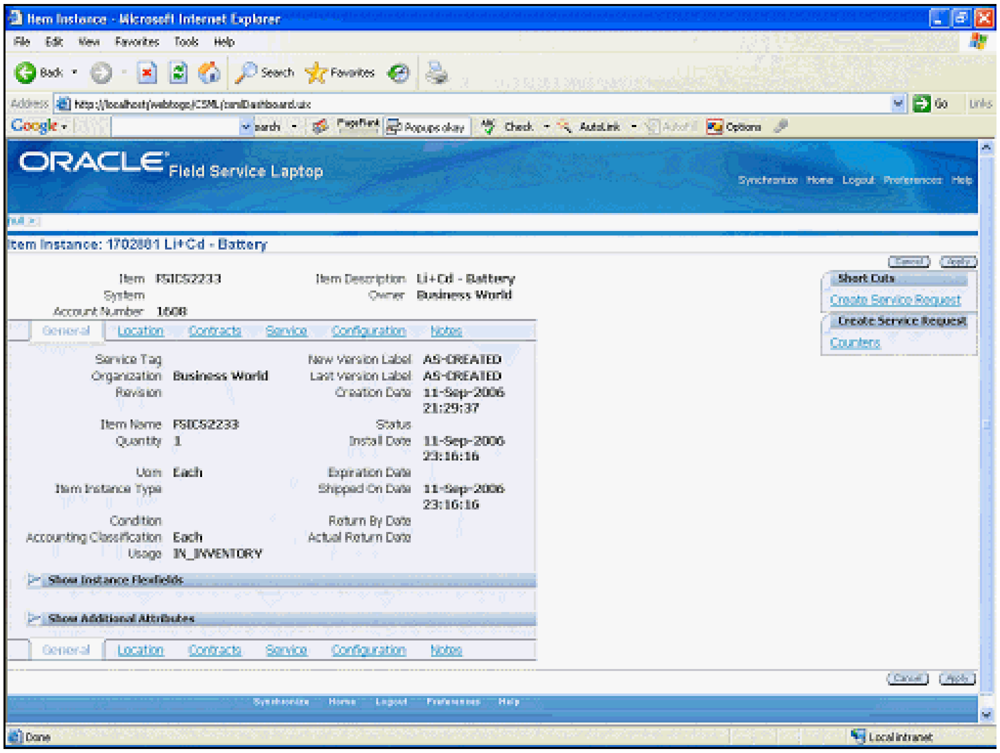
Dashboard Summary Table Functions

Field service technicians can perform multiple functions from the Dashboard summary table:

- To view service request detailed information, click the Details Show link.

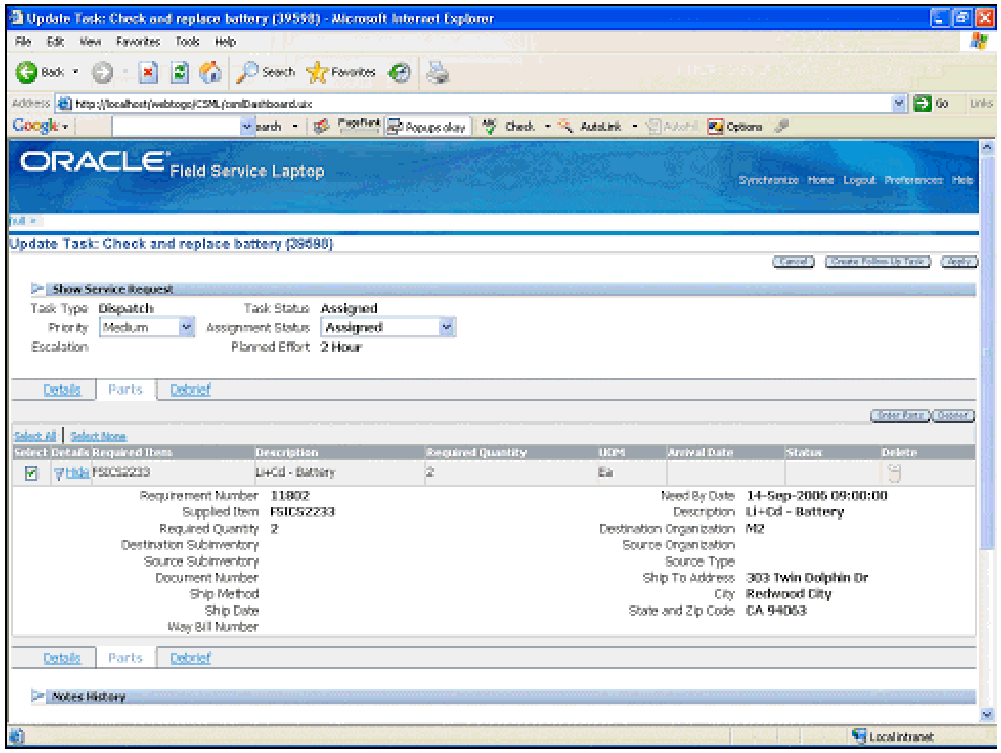


- To access Item Instance details, click the Details Show link, and then from the expanded Details region, click the Item link.



- Using Item Instance details:
  - Access Location details by clicking the Location link.
  - Access Contract details by clicking the Contracts link.
  - Access Configuration details by clicking the Configuration link.
  - Access Service history details by clicking the Service link.
  - Access Notes details by clicking the Notes link.
- To access service request details, drill down to the Service Request user interface by clicking the service request number link.
- To view customer and product information, click the service request number link.
- To access task detailed information, click the Update icon in the row for the task.
- To access install base details, click the Install Base icon in the row for the task.
- To access service part details, click the Parts icon in the row for the task.

Note: The Parts icon is enabled on the Dashboard only if there are parts associated to the task.



- To report labor, material, and expense, click the debrief icon in the row for the task.
- To change task assignment status, in the row for the task, select from the drop down menu in the Assignment Status column.

Search Area

The search area is used to retrieve a subset of tasks, based on search criteria that you specify. The technician can search based on customer name, service request number, and task number using the basic search functionality. Using the advanced search functionality, the technician can search based on combinations of conditions and search parameters.

See Using Search and Advanced Search, page 5-22.

Quick Links

Quick links are provided to the following operations:

- Create Parts Order.

See Ordering Parts for a Specific Task, page 5-27 and Ordering Parts for Trunk Stock, page 5-29.

- Parts Transfer.

  See Transferring Parts Between Sub-Inventories, page 5-33.

- Calendar.

  See Viewing the Technician's Calendar, page 5-34.

- Create Personal Tasks.

  See Creating a Personal Task, page 5-36.

Messaging

From the Messaging region you can choose to:

- View Messages.

- Create Messages.

See Using the Messaging Page, page 5-38.

Create Service Request

The Create Service Request region provides you access to create new service requests. When you are at a customer site, the customer may have an additional request. As an additional service, you can create a service request for this customer.

See Creating a Service Request, page 5-40.

Dashboard Customized Views

Field technicians can arrange the information on their dashboards to meet their specific needs. The Field Service Technician Dashboard is delivered with three seeded views, which contain a preselected sequence of display columns. The number of tasks that display per page is set as well. Technicians can duplicate, and then modify the seeded views to personalize them, or they can create an entirely new view in which the task search criteria are determined by the technician.

> **Important:** Dashboard customizing functionality is available only from the Mobile Field Service Developer responsibility.

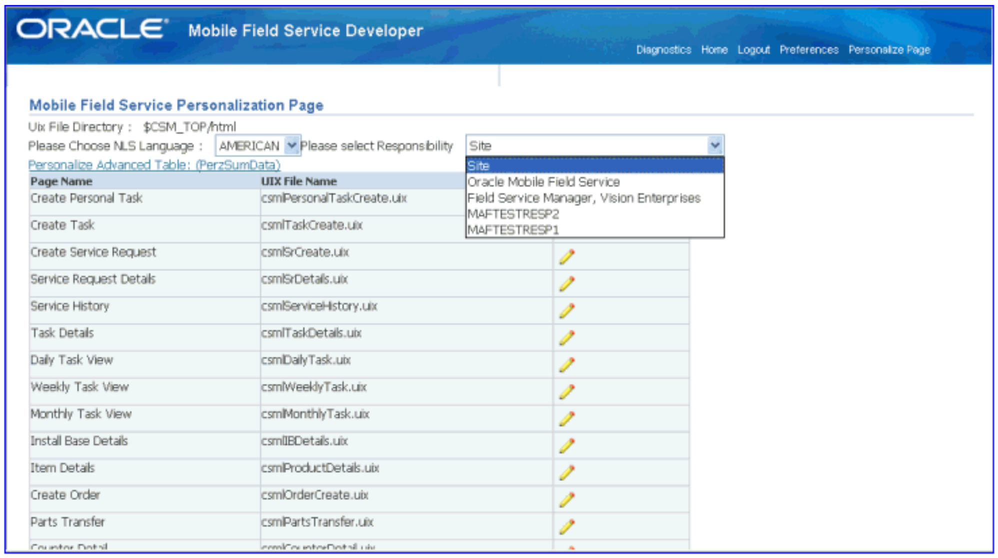
See Customizing Dashboard Views, page 5-11.

Customizing Dashboard Views

Use the following procedure to personalize views.

Steps:

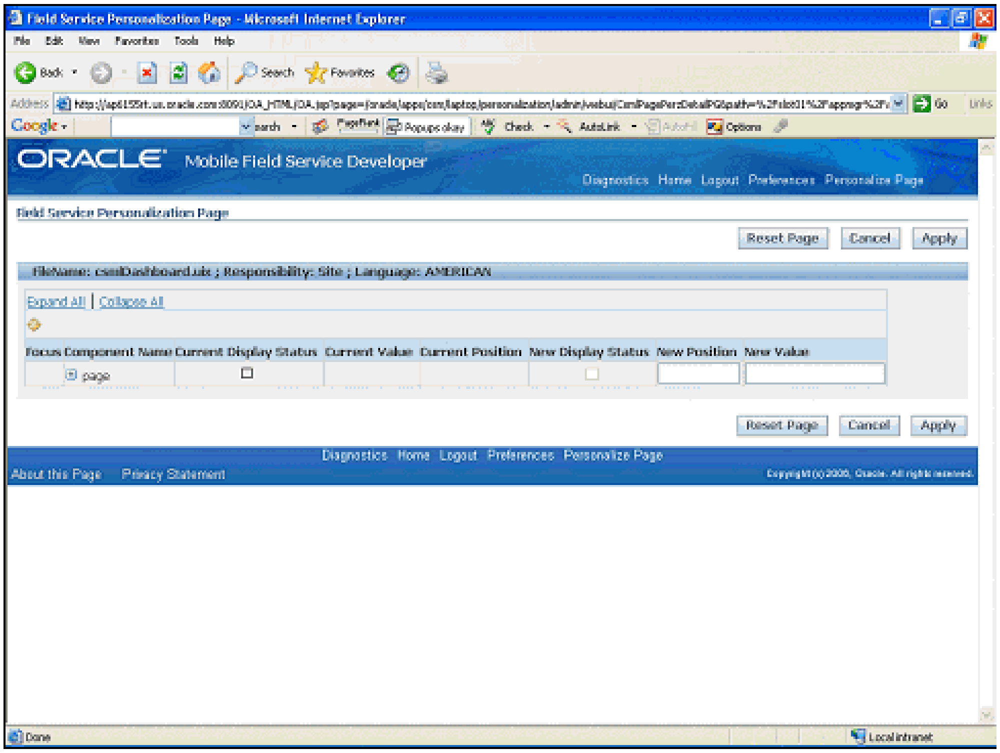
1. From the Mobile Field Service Developer responsibility, navigate to the Field Service Personalization Page.



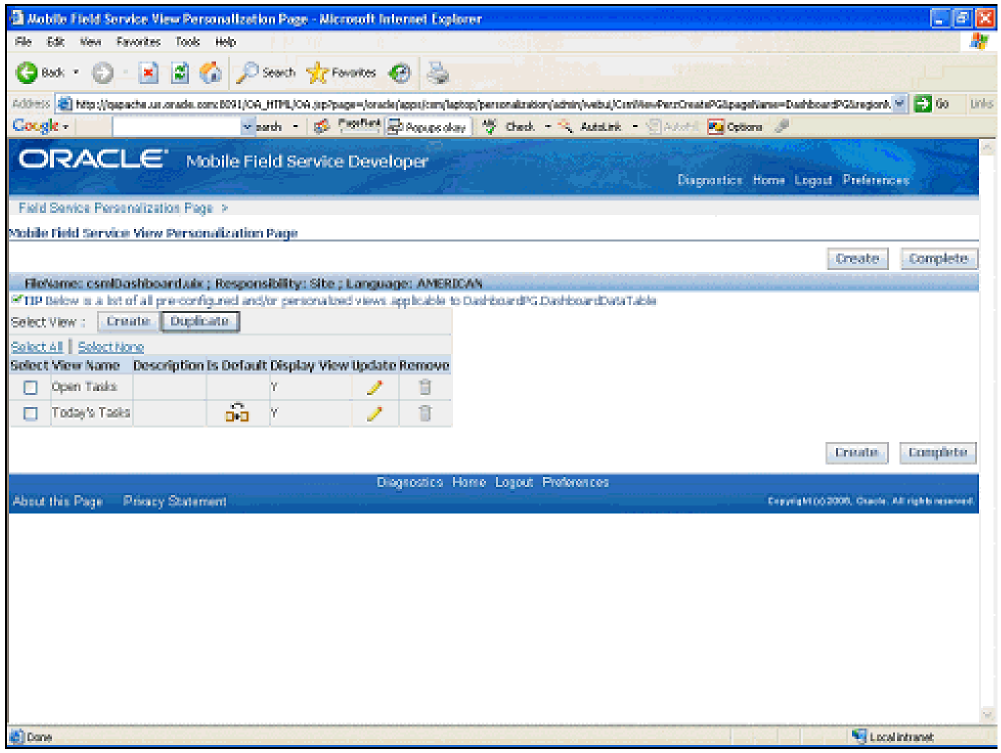
2. The personalization feature is limited to the Site and Responsibility level. Choose the level of personalization along with the language from the drop down menus in the header portion of the Mobile Field Service Personalization page.

3. Click the Personalize icon in the row for the Dashboard page name, UIX Filename csmlDashboard.uix.

   The personalization icon launches the Field Service Personalization Page.



4. Click Expand All.



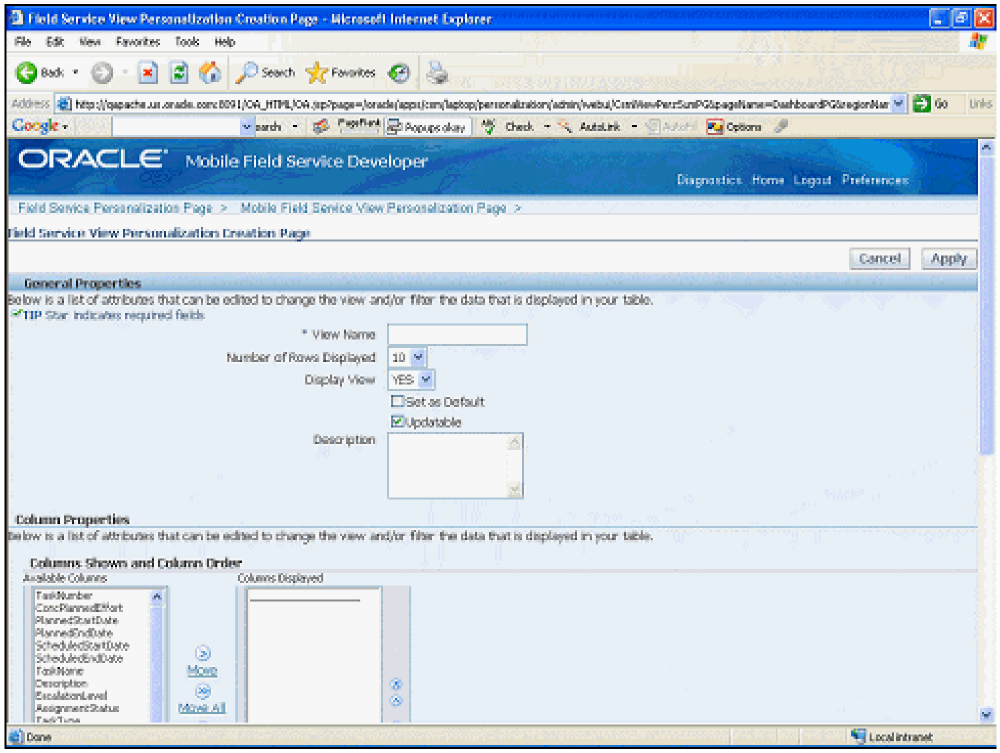
5. Click the Include Dashboard Table Link.

   This launches the mobile Field Service Personalization page.

6. From this page you can modify an existing view, duplicate an existing view, or create a new view.

   - To modify an existing view, select the view, and then click the Update icon in the row for the selected view.
   - You can personalize any of the views in the dashboard by duplicating the view under a different name, and then changing the parameters for the duplicated view to fit your needs. To duplicate an existing view, select the view, and then click Duplicate.
   - To create a new view, click Create.

   This screen capture shows the result of clicking Create, to create a new view. The Field Service View Personalization Creation Page appears.



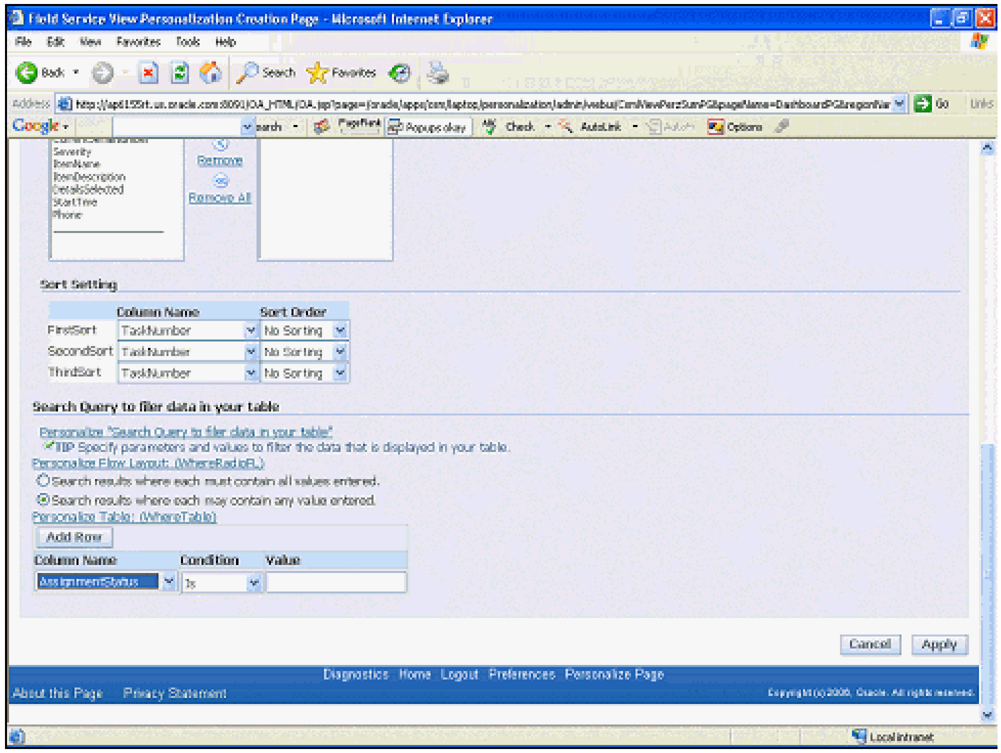
7. On this page you:

   - Enter the View Name.
   - Enter the View Description.
   - Specify the number of rows to display per page.
   - Select the Set as Default check box if you want this view to open when the Dashboard is launched.
   - Select the Updateable check box if you want to enable this view to be modified in the future.

8. In the Column Properties region, select the columns of information that you want to have appear in the view by moving the column labels from the Available Columns dialog box to the Columns Displayed dialog box. To remove a column, move it from the Columns Displayed dialog box to the Available Columns dialog box.

9. The left-to-right sequence that columns appear in the view depend on the top-to-bottom sequence of column labels in the Displayed Columns dialog box. Select the column labels in the Displayed Columns dialog box, and the use the arrows to adjust the sequence as desired.

10. In the Sort Setting region, you can define the primary, secondary, and tertiary sort column names, and whether the sort order is ascending, descending, or no sorting.



11. The view spread table is populated based on the Search Query criteria that you specify in the Search Query to filter data in your table region.

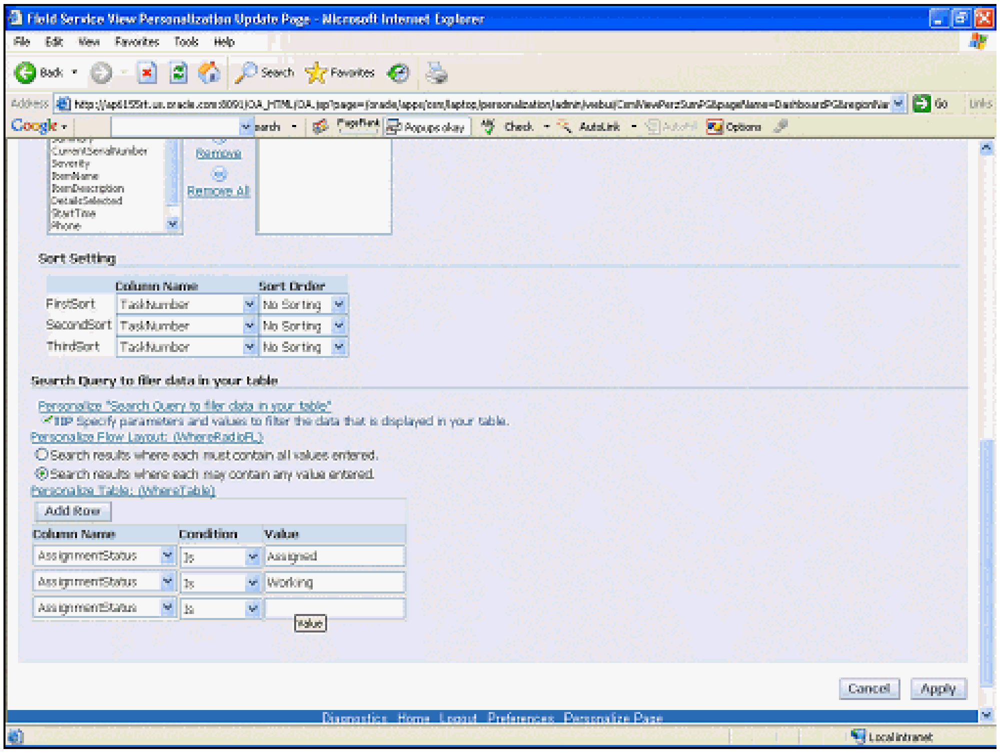
12. Begin by choosing one of the following radio buttons:

    - Search results where each must contain all values entered. The search behaves like the "and" logic condition. The tasks retrieved to the table will match all the defined search criteria.

    - Search results where each may contain any values entered. The search behaves like the "or" logic condition. The tasks retrieved to the table will match one or more of the defined search criteria.

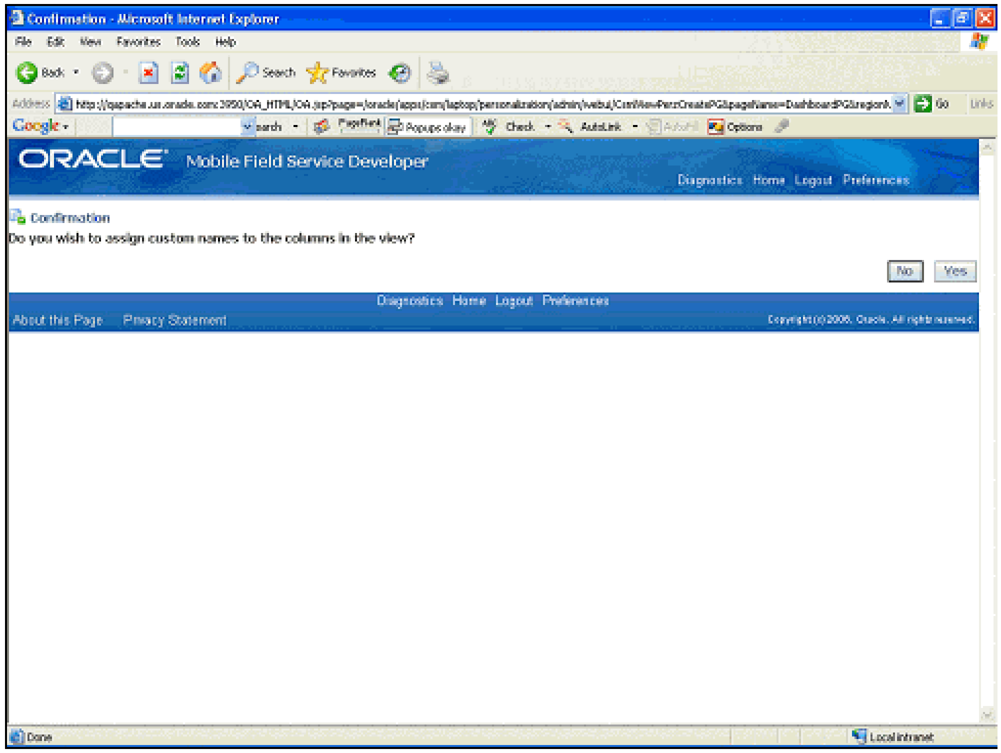
13. Next, add one or more task search criteria to the view. Specify Column name, condition (is, is not, greater than, and so on), and value.

14. If you need more rows to specify more criteria, click Add Row.



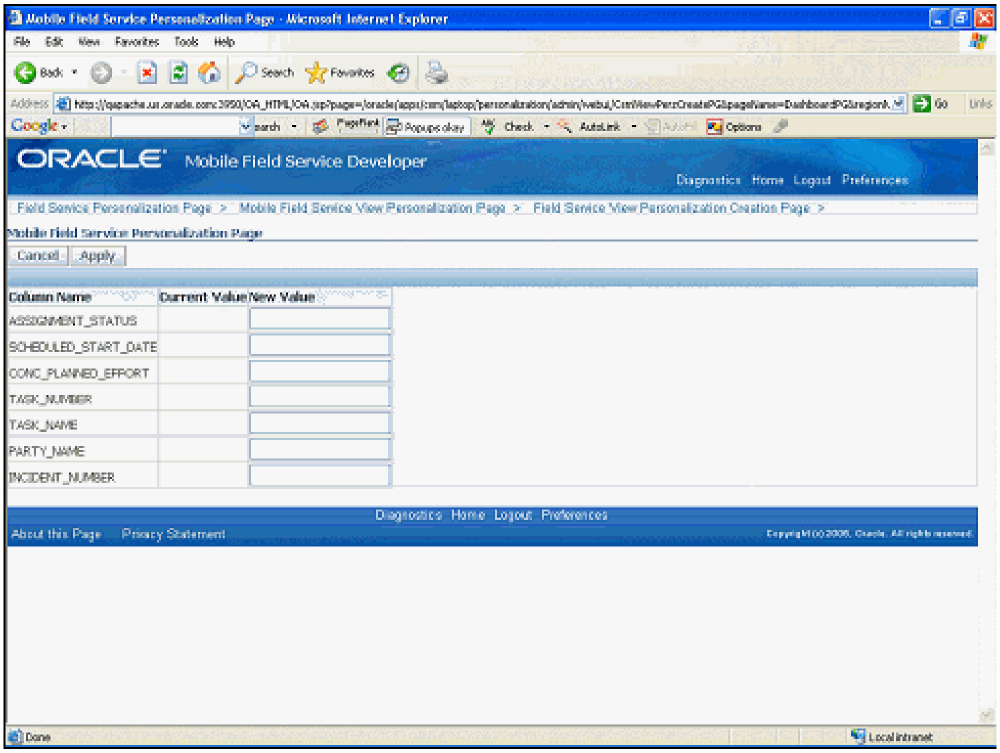
15. When you have finished creating the view, click Apply.

    The Confirmation page appears.



16. If you want to assign custom names to the columns in this view, click Yes.

    A page that lists the column names in this view appears.



17. Change the column names as desired by entering the new name in the New Value column.

18. Click Apply to return to the Mobile Field Service View Personalization Page.

    The new view is listed in the table.

19. Click Complete.

Changing View Element Sequence

You can change the sequence that elements appear in Views.

Example

For example, in the Main View, the default sequence of QuickLinks is:

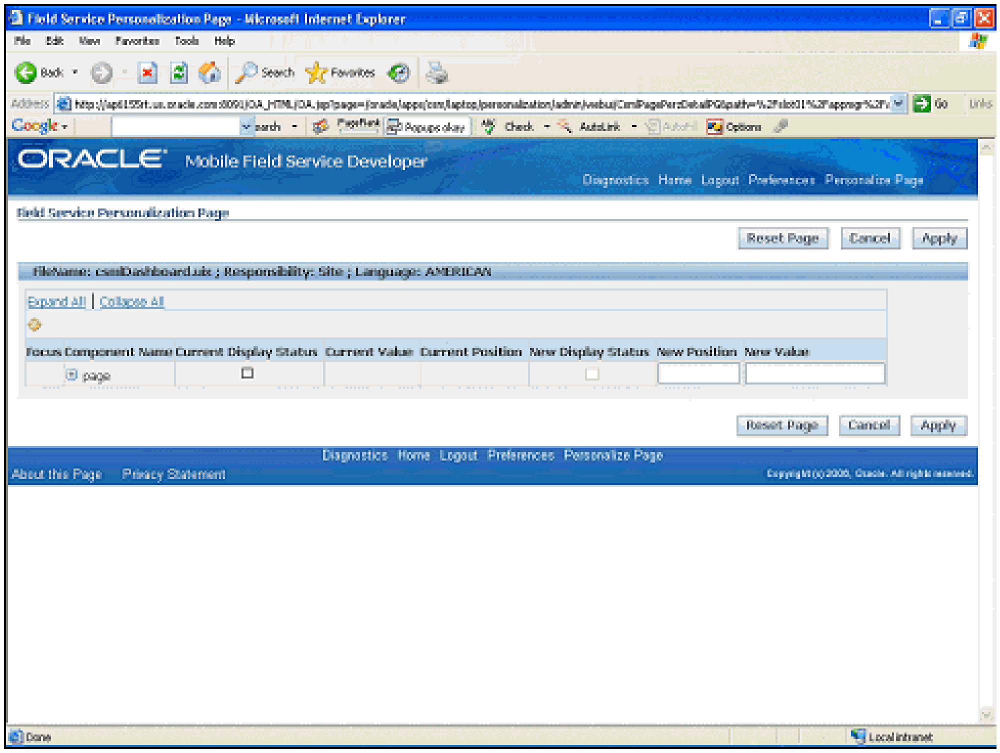
- Create Parts Order
- Parts Transfer
- Calendar
- Create Personal Tasks

Follow this procedure to change the sequence of view elements.

Steps:

1. From the Mobile Field Service Developer responsibility, navigate to the Field Service Personalization Page.

2. Click the Personalize icon in the row for the Dashboard page name, UIX Filename csm|Dashboard.uix.



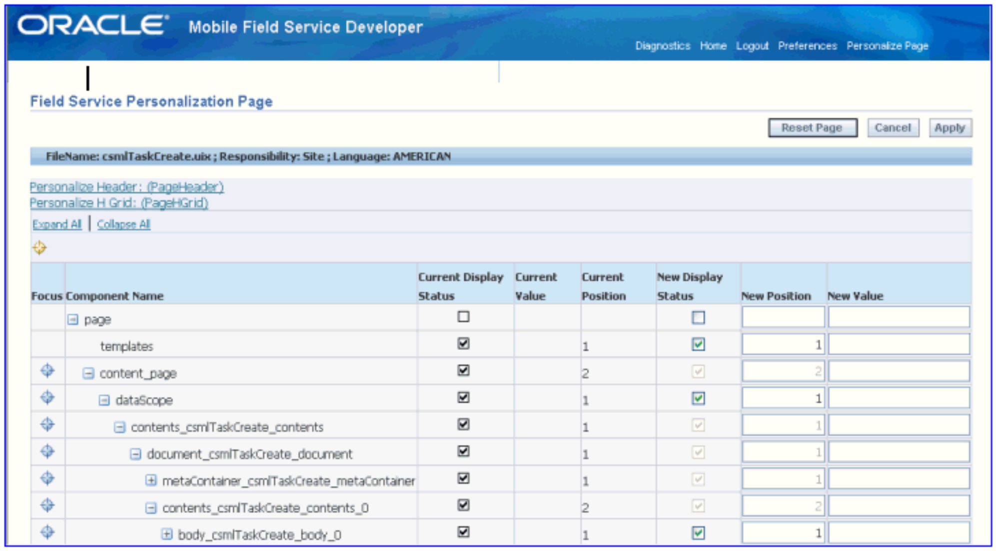
3. Click Expand All. Alternatively, click the "+" sign to expand the page.

   Each row in the table represents an element of the Dashboard page. Notice that some elements are nested within others. The Current Display Status check box indicates whether the element displays on the page. The Current Position indicates the sequence of the element with respect to its nested siblings.

   Example

   For example, the screen capture shows that nested within the document_document element, the "Metacontainer csm|TaskCreate_meta_container" is at Current Position 1, and the "contents_csm|TaskCreate_contents_0 is at Current Position 2.

   > **Note:** The Current Position column and Current Display column are display only.



4. For example, scroll to the row that represents the Quick links region.

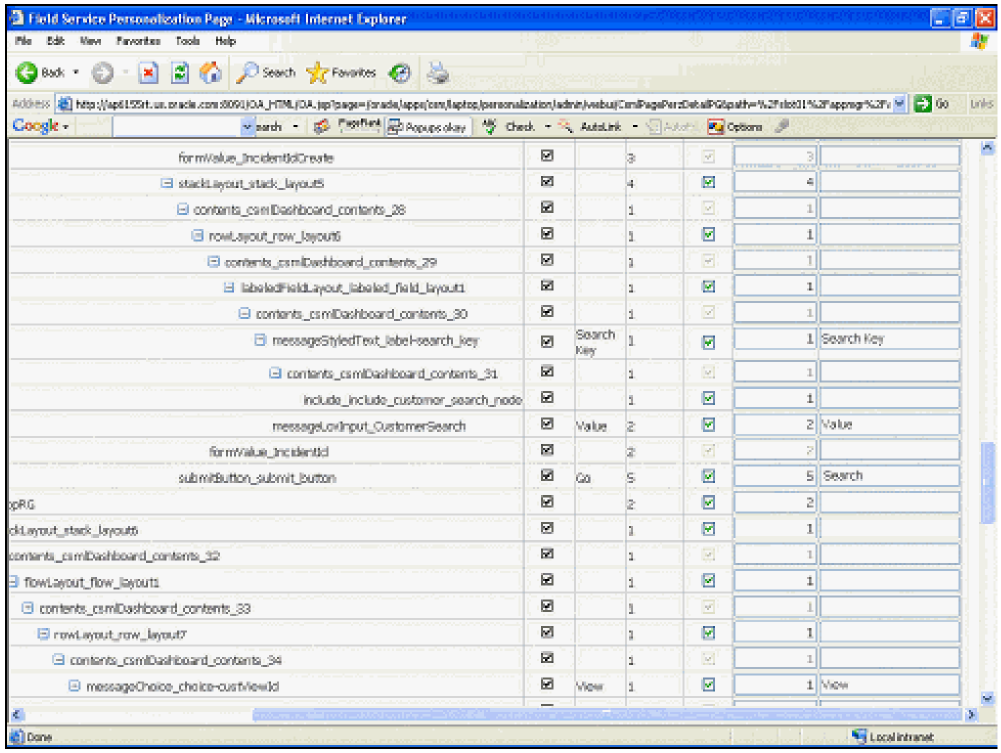
   The field that represents the Create parts order link is in Current Position 1. The field that represents Transfer parts link is in Current Position 2.

5. To switch the sequence of these links, switch the New Position numbers.

   Change the Create parts order link to New Position 2, and the Transfer parts link to New Position 1.

6. To hide an element, such as the Create Personal Tasks link, clear the Current Display Status check box.

7. To change the label of an element, scroll to the labeled element, such as the search "Go" button (submission_submit_button). The Current Value is set to "Go". To change the label, for example to change the label to "Search", in the New Value field located at the far right of the table, change "Go" to "Search".



8. Click Apply.

Causing Personalization Changes to go into Effect

For the personalization changes to take effect in the Oracle Mobile Field Service Store and Forward Laptop application the JTM Master Concurrent Program with Lookup category needs to be executed.

Steps:

1. From the Field Service Manager responsibility, navigate to the concurrent program requests page for the "JTM Master Concurrent Program with Lookup category" program.

2. Submit the program, and then wait until the program progresses to a Complete status.

3. Startup the Mobile Field Service / Laptop application. See Launching and Synchronizing Oracle Mobile Field Service / Laptop, page 5-3.

4. Click the Synchronize link.

   Ensure that the synchronization completes successfully.

5. When the synchronization completes successfully, open the new or modified view to verify the result.

Using Simple Search and Advanced Search

The Dashboard enables search for task-related information based on Customer Name, Service Request, or Task Number. By selecting a criterion in the Search Task By field, and then entering a partial value in the Search Criteria field, technicians can quickly retrieve specific task information. Advanced Search functionality is also available by clicking the Advanced Search link. When you click the Advanced Search link, the Search Task window appears where you can enter more detailed criteria. For example, you could perform a search on the scheduled start date for a specific task.

Steps:

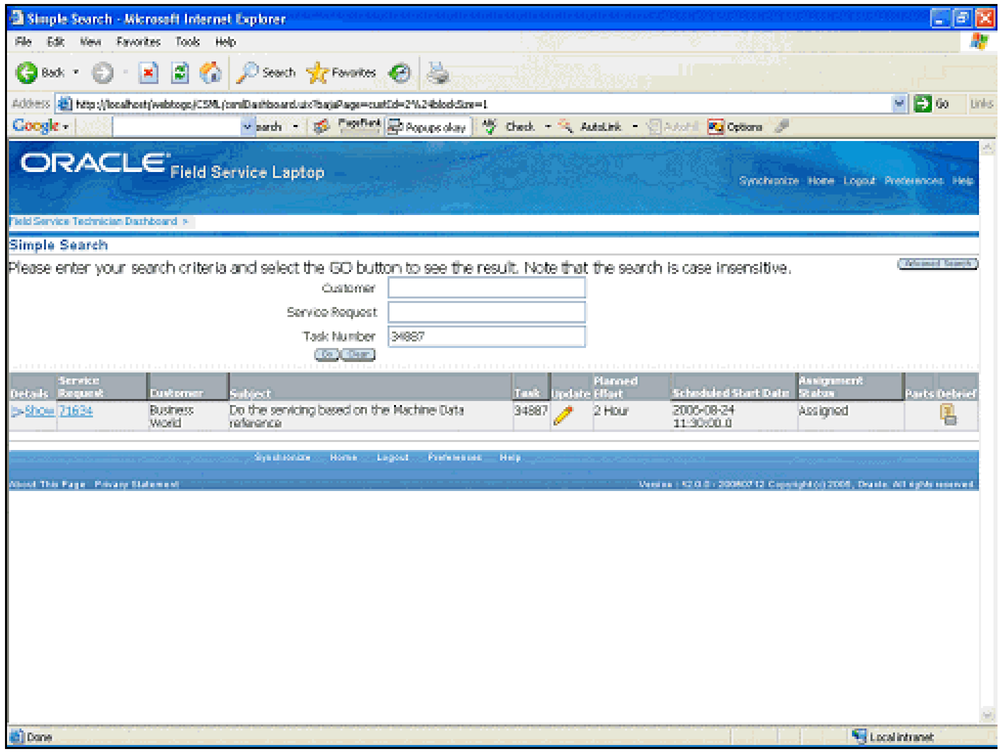
Simple Search

1. From the Search Task By drop down list select the type of information on which you want to search the task-related information, such as "Task Number".

2. Enter the data value that you want the search to match, such as the task number.

3. Click Go.

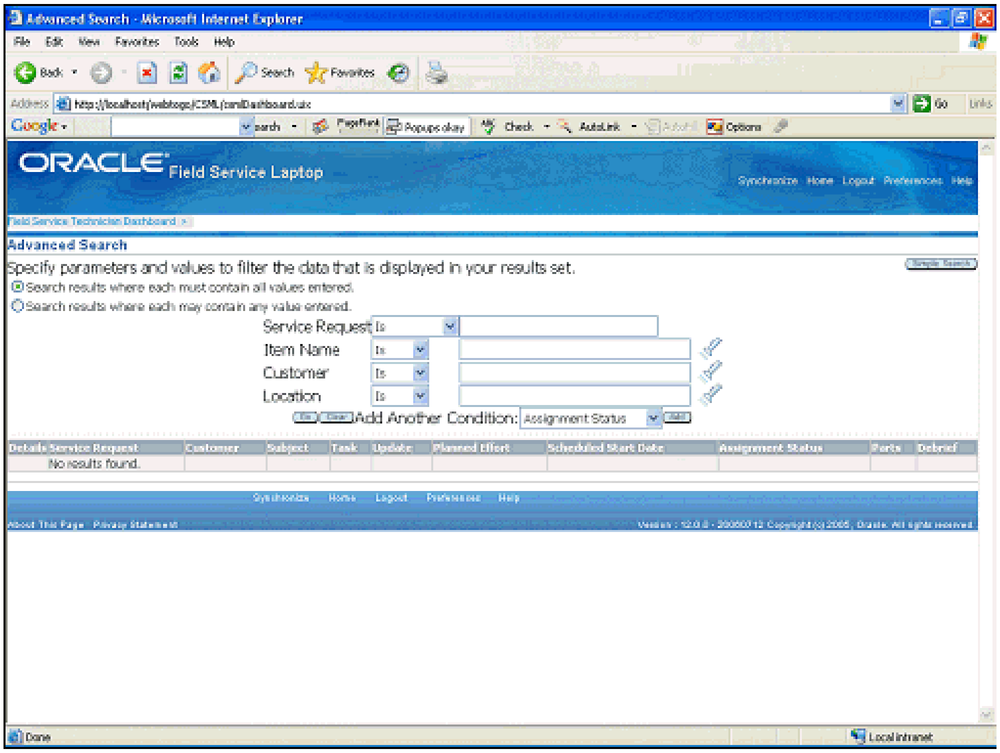
   The Simple Search table populates.



Advanced Search

The Technician has the ability to perform an Advanced Search to narrow the search criteria down even further that that found using the simple search.

4. Click the Advanced Search link.



5. Begin by choosing one of the following radio buttons:

   - Search results where each must contain all values entered: The search behaves like the "and" logic condition. The tasks retrieved to the table match all the defined search criteria.

   - Search results where each may contain any values entered: The search behaves like the "or" logic condition. The tasks retrieved to the table match one or more of the defined search criteria.

6. Specify the search criteria conditions by choosing a condition from the drop down. Specify values.

7. To Add more criteria, choose a condition from the Add another Condition drop-down menu, click Add, and then specify the Search Criterion, Condition, and Value for the new condition added.

8. Click Go.

   The Advanced Search table populates.

   Note: To remove a search condition and value, click Clear.

Viewing and Opening Tasks

Task can be viewed and opened using any of the following ways:

- Using the Field Service Technician Dashboard. See Field Service Technician Dashboard, page 5-5.
- Using the Technician's Calendar. For more information, see Viewing the Technicians Calendar, page 5-34.
- Using the search results of task-related information. See Using Simple Search and Advanced Search, page 5-22.

From the Field Service Technician Dashboard, you can learn which customers you are scheduled to visit, what tasks you will perform at each site, and retrieve additional information about the listed tasks.

To view and open a task, complete the following steps:

Steps:

1. Launch the Field Service Technician Dashboard.

   The information for the default view appears.

2. To change the view, choose a view from the View drop-down list located in the header region of the Field Service Technician Dashboard, and then click Go.

   The information for the selected view appears in the summary table.

   - Service Request name and Task name
   - Customer column - View the Customer name.
   - Subject column - View the description of the Service Request name.
   - Product column - Click the Parts icon to view service product details.
   - Task Number column - View the task number of the desired task.
   - Status column - View and specify the current task status.

3. To view task-related details, click the Update icon against the respective tasks.

4. To view the service request, item instance, and customer details, click the Show / Hide link in the Details column.

5. To specify the current task status, access the status drop-down list for the desired task, and then make the appropriate selection. Click Apply to save the status to the

local database on your laptop computer.

Choose a status from the following table:

Task Status	Description
Accepted	Assign this status to a task once you have viewed the calendar and are ready to work on the task.
Assigned	A task has this status when it is initially downloaded onto the laptop computer.
Cancelled	Assign this status to a task that has been cancelled.
Closed	Assign this status to a task that is now closed.
Completed	Assign this status to a task once you have completed a task.
Rejected	Assign this status to an assigned task that you are unable to accept.
Working	Assign this status to a task once you have started to work on the task.

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

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

Debrief

Field service technicians use the Debrief module to view their task assignment details, accept or reject assignments, update task statuses, capture travel related information, and report on material, labor time, and expenses for their individual task assignments. Data gathered is used for generating customer invoices, updating the installed base, and maintaining the service vehicle trunk stock.

Debrief procedures for the Mobile Field Service / Laptop application are the same as the debrief procedures from the Field Service Technician Portal. See the Debriefing Work Completion chapter in the *Oracle Field Service User Guide*.

Ordering Parts for a Specific Task

Using the Mobile Field Service Laptop, the Field Service technician has the ability to order parts for a specific task. Based on the sourcing rules and availability of parts within the technicians trunk stock, the parts ordering functionality results in creating one of the following:

- Purchase Requisition
- Internal Order

To order a part specific to a task, the user clicks the Update task icon from the Dashboard, clicks the Parts tab, and then clicks the Order Parts button.

To order a part specific to a task:

Prerequisites

❒ The desired part must be defined as "orderable".

❒ The desired part must already exist, either in the vehicle or at some other location. This prerequisite is applicable only when Spares Management is being used. See the Oracle Mobile Field Service Implementation Guide.

Steps:

1. Navigate to the Field Service Technician Dashboard.

   The Dashboard appears.

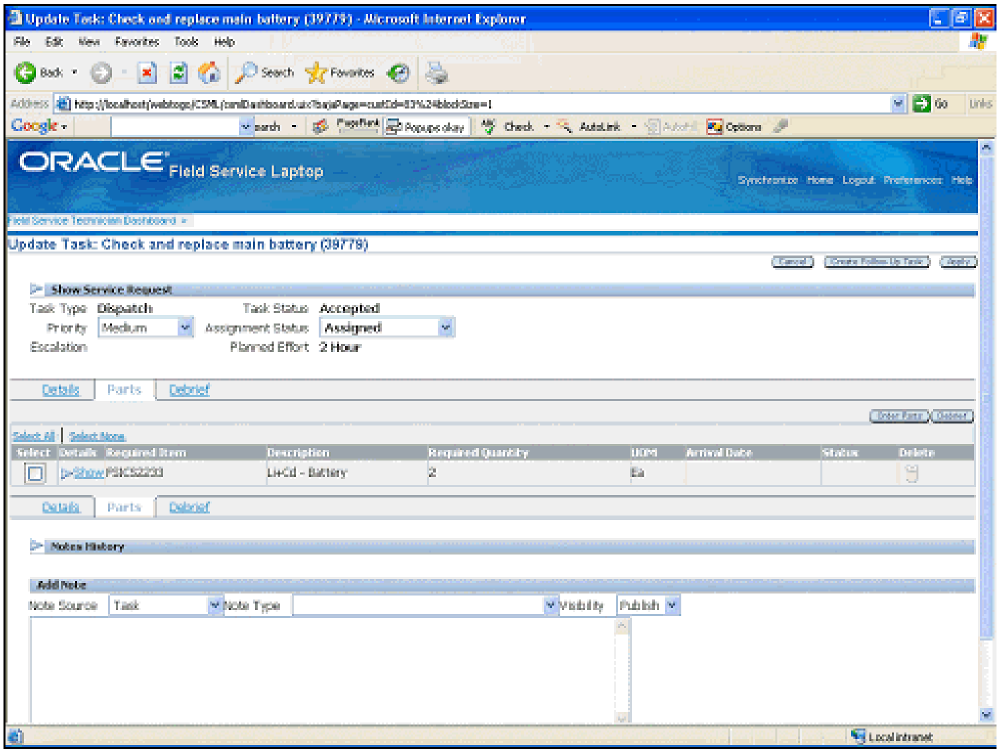
2. From the Dashboard, click the Update Task icon against the task for which parts need to be ordered.

   This launches the Details page within the Update Task page.

3. Click the Parts tab.

4. Click Order Parts.

   The Create Parts Order: Parts window opens.



5. Provide the Need By Date in the header.

6. Choose a destination sub inventory. The technicians default Usable sub inventory appears as the default value.

7. Choose an address. The technicians primary address appears as the default value.

8. Enter the Required Item for the parts order or search for it in the available lookup table.

   After you select the item, the unit of measure default value appears.

9. Enter the Required Quantity.

10. Provide item revision details if required.

11. (Optional) Enter the Ship Set value.

    A ship set is a group of order lines, linked by a common number. Set this value to specify that the full quantity of certain items must be shipped together.

12. Click Apply.

    The following chart details the fields and their respective definitions:

Create Parts Order Field Definitions

Field Name	Definition
Required Item	This field displays all inventory items that can be used to create the parts requirement.
Required Quantity	This field indicates the quantity required to create the parts requirement.
Revision	This field indicates the revision details of the required item
UOM	The unit of measure for the required item.
Ship Set	This field indicates the quantity of the items that should be shipped together.

Note: The Need By Date, Address, required item, Required Quantity, and UOM are mandatory fields.

13. To remove the row added in the parts requirement before creating the order, in the Remove column, click Remove.
14. To delete a requirement after a parts requirements has been created:
    1. Click the Update Task icon against the specific task.
    2. Open the Parts tab.
    3. In the Select column, click the check box to select the row that needs to be deleted.
    4. In the Delete column, click the Delete icon.

       Important: Parts requirements can be deleted only before synchronization. After synchronization with the enterprise, parts requirements cannot be deleted from Mobile Field Service.

Ordering Parts for Trunk Stock

Based on the sourcing rules and availability of parts within the technician's trunk stock, the parts ordering functionality results in creating one of the following:

- Purchase Requisition
- Internal Order

> **Note:** The process for creating a parts order for the technician trunk stock is similar to the process for creating a parts order for a specific task. Both processes use the same User Interface.

To create a parts order for trunk stock sub-inventory, follow these steps:

Prerequisites

❒ The desired part must be defined as "orderable".

❒ The desired part must already exist, either in the vehicle or at some other location. This prerequisite is applicable only when Spares Management is being used. See the Oracle Mobile Field Service Implementation Guide.

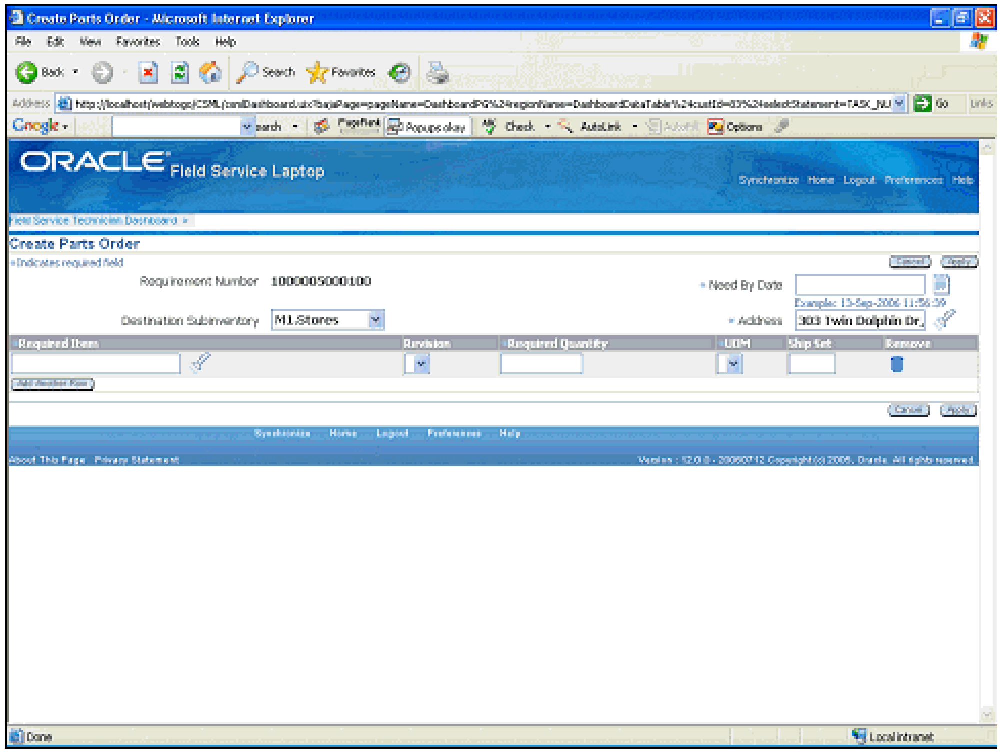
Steps:

1. Navigate to the Field Service Technician Dashboard.

   The Dashboard appears.

2. From the Quick links section, click Create Parts Order.

   The Create Parts Order window opens. A temporary Parts Requirement number is automatically created for the order. This Parts Requirement number is saved when you click Apply to complete the transaction.



3. Verify the Address.

4. Select a Need By Date for the parts order.

5. Confirm the Destination sub-inventory is correct. If it is not correct, choose the correct sub-inventory from the list of values.

6. Enter the Required Item for the parts order or search for it in the available lookup table.

   After you select the item, the unit of measure default value appears.

7. Enter the Required Quantity.

8. Provide item revision details if required.

9. (Optional) Enter the Ship Set value.

   A ship set is a group of order lines, linked by a common number. Set this value to specify that the full quantity of certain items must be shipped together.

10. (Optional) Enter the Ship Set value.

    A ship set is a group of order lines, linked by a common number. Set this value to specify that the full quantity of certain items must be shipped together.

The following chart details the fields and their respective definitions:

Create Parts Order Field Definitions

Field Name	**Definition**
Required Item	This field displays all inventory items that can be used to create the parts requirement.
Required Quantity	This field indicates the quantity required to create the parts requirement.
Revision	This field indicates the revision details of the required item
UOM	The unit of measure for the required item.
Ship Set	This field indicates the quantity of the items that should be shipped together.

> **Note:** The Need By Date, Address, required item, Required Quantity, and UOM are mandatory fields.

11. Click Apply to complete the transaction.

    This action validates and saves the Parts Requirement number created in step 1, creates the order number, and generates a parts order confirmation.

Viewing Parts Order Details

Once a part is ordered, you can view the details regarding this part.

Complete the following steps to view part order details.

Prerequisites

❒ A part must be ordered.

Steps:

1. Click the Update icon against the task for which the parts were ordered.

2. Select the Parts tab in the Update Task page.

3. Click the Show link to view the details of the parts order.

   The technician is able to see the parts order created only for a specific task.

Transferring Parts Between Sub-inventories

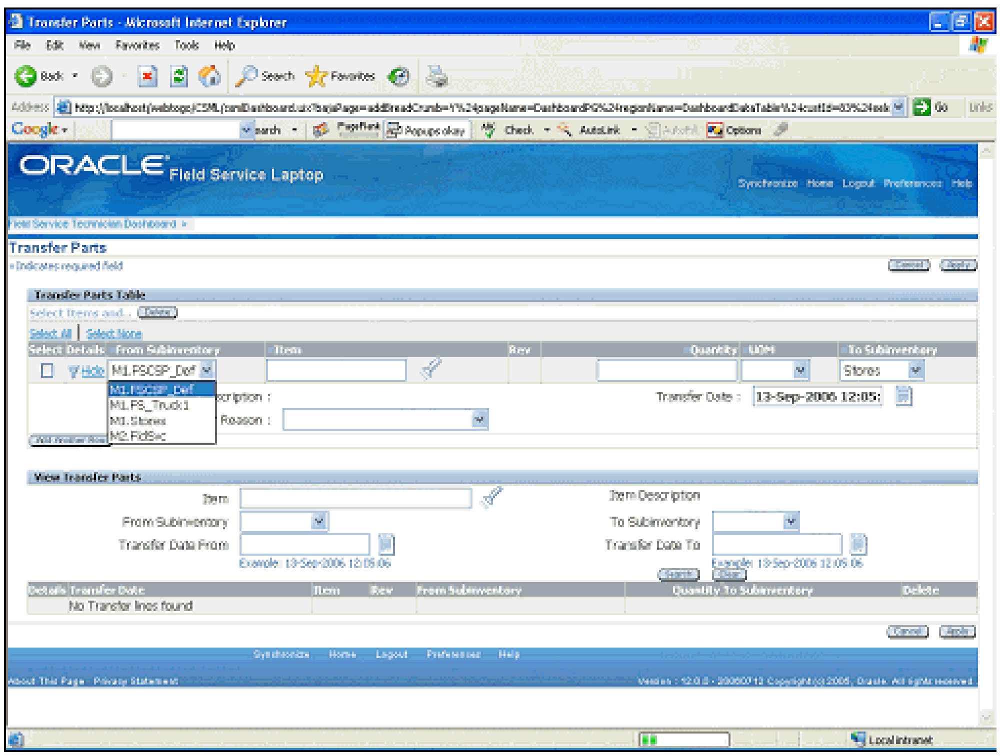
Using the Parts Transfer QuickLink from the Dashboard, the technician can transfer parts between their sub-inventories.

Steps:

To transfer parts

1. Click the Parts Transfer link.

   The Transfer Parts window appears.



2. Click Add Another Row.

3. In the From Subinventory field, select the source sub-inventory from the drop-down list.

4. In the Item field, select the item you want to transfer.

5. In the Quantity field, enter the quantity you want to transfer.

6. In the UOM field, provide the unit of measure for the quantity you want to transfer.

7. In the To Subinventory field, select the destination sub-inventory from the drop-down list.

8. In the Transfer Reason field, select a reason from the drop-down list.

9. Complete the control attributes for the item based on the item selected.

   Example

   For example Serial Number, Lot Number, in their respective fields.

10. In the Transfer Date field, provide the transfer date. The transfer date default value is the system date. The user can enter a future transfer date, but not a past date.

11. Click Apply.

To exit without transferring the part

12. In the Select column, in the new row added for the parts transfer, select the check box.

13. In the Transfer Parts table header, click Delete.

To delete a parts transfer

14. Search for the specific part transfer in the View Part Transfer details.

15. In the Delete column, click the Delete icon for the specific part transfer detail.

Viewing parts transfer details

16. Click the Transfer Parts link in the Quick Links section of the Field Service Technician Dashboard.

    This action launches the Transfer Parts page.

17. Provide search criteria details. Click Search.

    Details are retrieved.

18. To view details of the parts transfer, click Show.

Viewing the Technician's Calendar

The Oracle Field Service Technician Dashboard provides a quick link to the Technician's Calendar. The technician has the ability to view the calendar in daily, weekly or monthly mode and can also drill down to task details from the calendar.

Use the following procedure to view the calendar:

Steps:

Opening the Calendar

1. From the Dashboard Quick Links section, click Calendar.

   At this point the technician's calendar launches in the daily view for the current date (by default).

Calendar Navigation

2. To view the previous or next day, click the Previous Day or Next Day buttons.

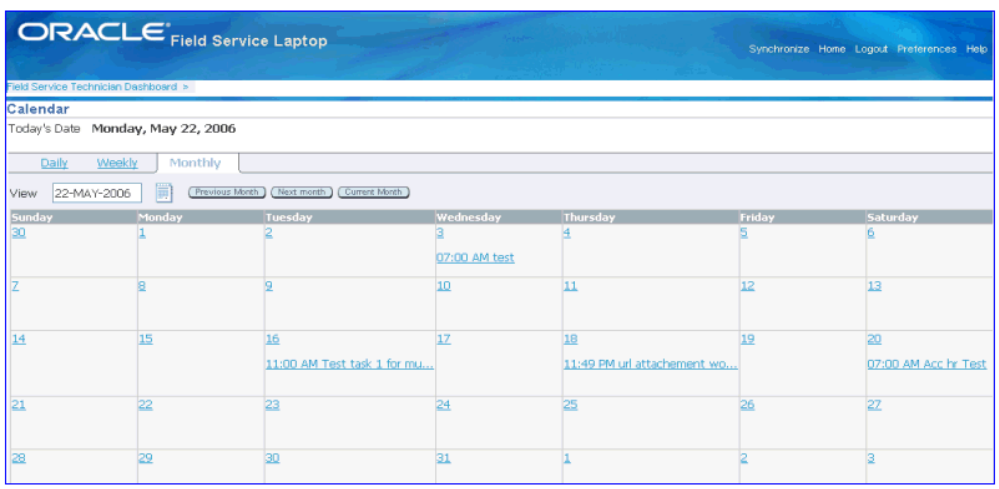
   > **Note:** The Calendar default date is the system date. You can type the date directly into the date field. If you type the date with the incorrect format, a warning message appears.

3. To view the calendar in Weekly or Monthly format, select the Weekly or Monthly tab.

   Depending on the tab you select, the weekly or monthly calendar format opens to display the current week or month.

4. On the Weekly tab, to view the previous or next week, click the Previous Week or Next Week buttons.

5. On the Monthly tab, to view the previous or next month, click the Previous Month or Next Month buttons.



6. To view the calendar for a specific day, click the Calendar from the Daily, Weekly, or Monthly tab.

   The Pick a Date window opens.

7. Select a date.

   Depending on which tab was open at the time the calendar was selected, the technician's calendar displays the day, week, or month for the date selected in the Pick a Date window.

View Task Details

8. To view task details click the corresponding link that appears on the calendar.

   - If you are in the Daily View, the tasks for the selected date appear in the Calendar page.

   - If you are in the Weekly View, the tasks for the week of the selected date appear in the Calendar page.

   - If you are in the Monthly View, the tasks for the month of the selected date appear in the Calendar page.

9. To drill down to task details from the Calendar page, click the Task Name.

10. To return to the calendar, click the calendar link at the top left of the page.

Printable page

11. To print the calendar, click the Printable Page button and then use standard print options on your browser.

Closing the Calendar

12. To close the calendar, click the Field Service Technician Dashboard link at the top left corner of the page.

Creating a Personal Task

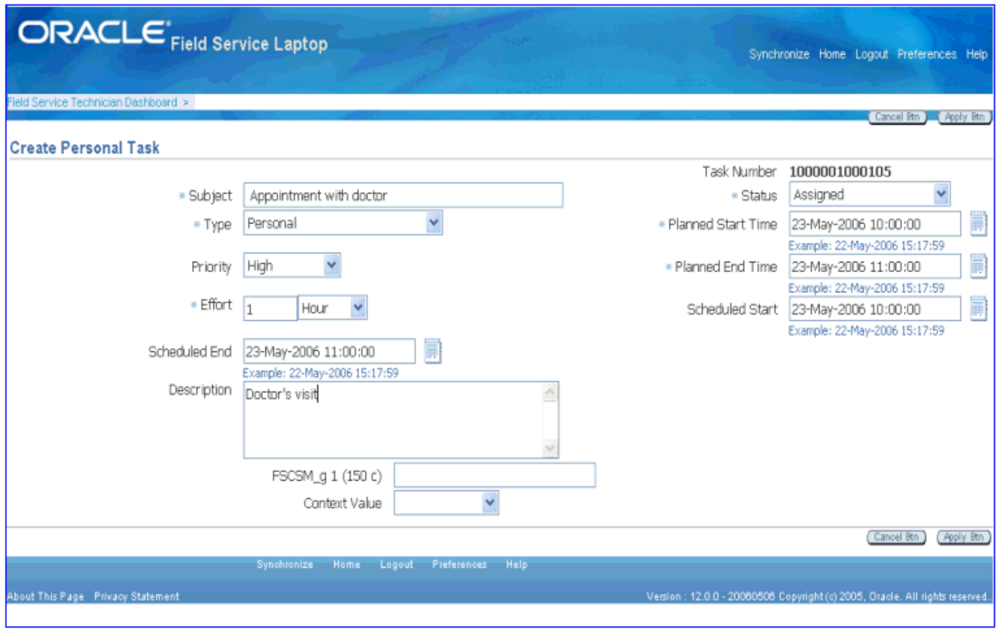
A *personal task* is a notice to the dispatcher that you will not be available for a particular period. A personal task is not dispatchable or tied to a service request, therefore making it different from a task that is loaded onto your laptop computer. For example, if you need to go to the dentist next week, you can create a personal task stating that you will be unavailable to perform service tasks for a certain period. By knowing your availability, the dispatcher can schedule your tasks more effectively.

To create a personal task, complete the following steps:

Steps:

1. From the Dashboard, click the link to open the Create Personal Task page.

   The Create Personal Task page appears.



2. Complete the Subject field.

3. Select the Personal Task type from the drop-down list.

4. Complete or modify the Status, Planned Start Time, Planned End Time, Schedule Start, and Schedule End.

5. In the Effort field, place the duration of the Personal Task.

   Note: The Type and Status drop-down lists, and the Subject, Scheduled Start, Scheduled End, and Planned Effort fields are mandatory.

6. (Optional) Complete other fields.

7. Click Apply Btn.

   Oracle Mobile Field Service/Laptop creates a personal task and then returns to the Field Service Technician Dashboard.

Viewing Customer Information

Before visiting a customer site, the technician needs address and customer information. this Customer information is available from the Field Service Technician Dashboard.

Note: The technician has the ability to view customer information only when there is a task for the customer assigned to the technician.

Customer information, such as name, country, and location can be displayed as columns in the selected view. Additionally, to view customer information, technicians can click the Show link in the Details column.

Viewing Install Base Information

Oracle Mobile Field service/Laptop enables you to view the location and product details for a customer product. You are also able to view the configuration of the customer product and any additional attributes. Finally, you are able to view and add customer product notes.

Complete the following steps to view Install Base information.

Steps:

1. From the Field Service Technician Dashboard, click the Show link in the Details column.
2. Click the link in the Item field.

   The Install Base Details Item Instance appears. The General tab opens automatically.

   > **Note:** The Item field will have the link only when an item instance is associated to the item, and the Service Request is created for that item and item instance combination.

3. To view the location details of the item instance, select the location tab .
4. To view item configuration details, select the configuration tab.

Using the Messaging Page

Oracle Mobile Field Service/Laptop enables you to send and receive messages from other people within your organization. This messaging function facilitates communication among field service employees. It can be set up to send messages among all Field Service users, or among the members of one team.

You can use this page to send or receive messages. You can use this functionality to ask for support or additional information.

Technicians can send notification messages to the other resources from the dashboard by selecting the link from the messaging section. The selection of the resource in the notification depends on the value of the profile 'CSM:Notifications Scope'. The possible values of this profile are:

- All field Service Users: In this case the technician can select any resource defined in the application.

- Representatives in the same Resource Group: In this case the technician can select only resources that share the same resource group.

After you synchronize with the enterprise system, you can verify if you have received any messages.

Complete the following steps to view messages that you have received, and to delete messages that you have read:

Viewing Received and Sent Messages:

1. Click the View Messages link to open the Work Notification page.

2. From the View drop-down menu, select the category of messages that you want to retrieve. The choices are:

    - All Notifications

    - Open Notifications

    - Notifications from me

3. To read a message, click the message subject in the Subject column.

    The complete message appears.

4. To delete a message, click Delete.

Writing and Sending New Messages:

When you need information from one of the other members of the field service organization, you can ask for it by sending a message.

Complete the following steps to write and send messages to other people in your field service organization:

1. Click the Create Message link to open the New Message page.

   The New Messages page appears.

2. Select the recipient from the To field drop-down list.

3. Complete the Subject and Message.

4. Click Submit.

   Note: Upon synchronization, the new message written by the technician is delivered to the recipient. Similarly, new messages for the technician become available for the technician to view from the view messages link.

Creating a Service Request

Field service technicians can create a new service request from the Dashboard.

Steps:

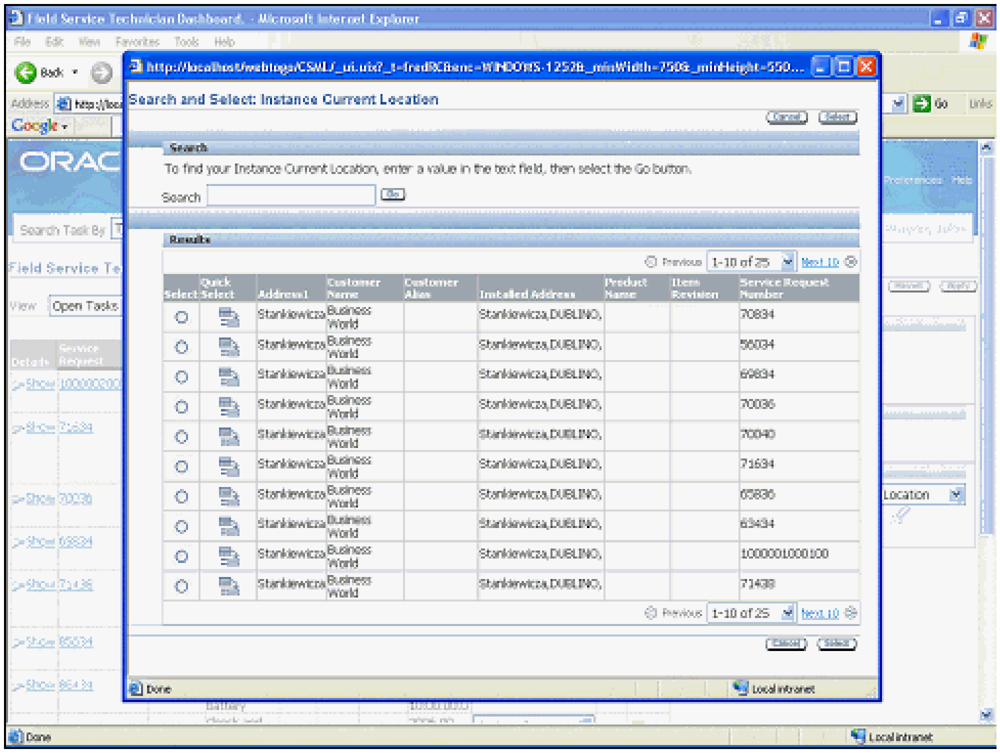
Create Service Request

1. In the Create Service Request region of the Dashboard, open the Search Key list.

   You can use existing service request identifiers such as Serial number, Instance number, Instance Current Location, Account number, and Contact name to create a service request.

2. Select a service request identifier and then click the launch search icon (flashlight).

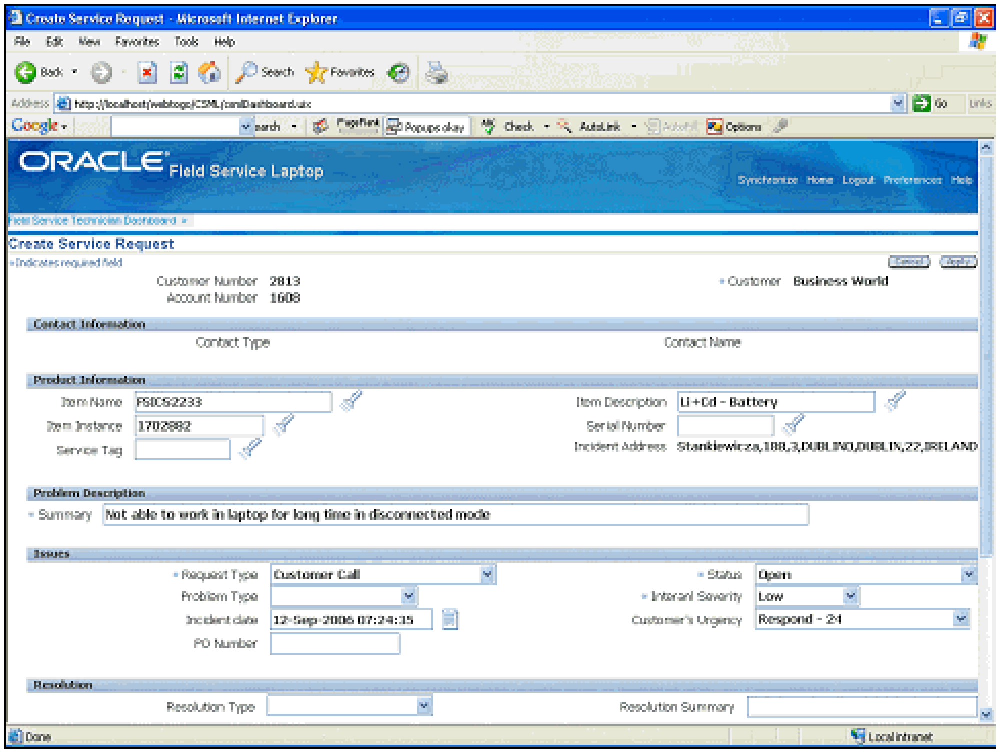
   For example, select Instance Current Location.



3. Make a selection, and then click Select.

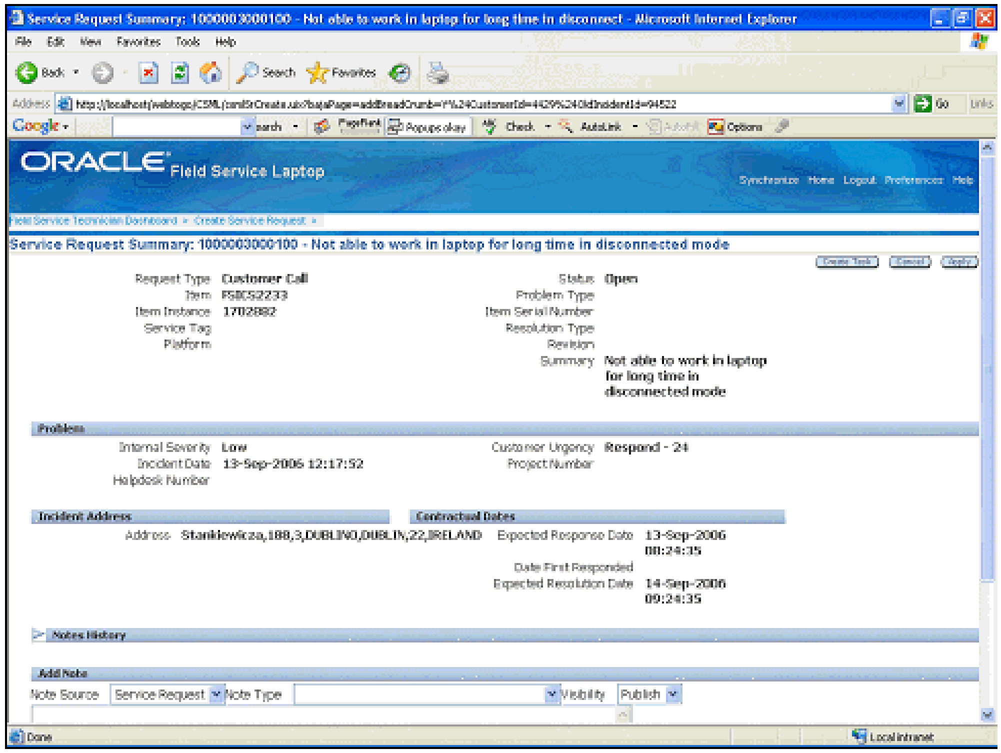
4. Returning to the Field Service Technician Dashboard, Create Service Request region, click Search.

   The Create Service Request page appears. The create service request page launches with fields populated based on the existing service request.



5. Modify details as required.
6. Click Apply to create a new Service Request.

   The Service Request Summary page appears.



Viewing Contract Information

Before starting a task, a field service technician should review details about the customer and task. Such details include contract information. The field service technician uses this information to determine the following:

- Customer entitlements
- Contract coverage

Oracle Mobile Field Service/Laptop displays contractual information in a table format that you can reference for transaction billing types.

Complete the following steps to view contractual information:

Steps:

1. Choose the service request for which you want to view contractual information.

   The contract number appears in the service request information.

2. To view details of the contract, click the link for the item.

   This launches the Item Instance Details page.

3. Click the Contract tab.

   The Information page displays the Contract Line Details view.

   - The contract number appears in the Contract Number field.
   - The type of service covered by the contract appears in the Service Name field.
   - The Service description code appears in the Service Description field.

4. Click the Show link against the contract number to view the business process and entitlement database details for the contract number.

   Example
   For example, an Extended Notebook PC Service Program covers eight transaction billing types, each with a maximum amount of $100,000. The percent covered by the service organization varies from transaction billing type. In one instance, a loaner notebook computer is provided under a Loaner transaction billing type with 10% coverage, so the service organization would only be responsible for 10% of the cost. In another instance, an Estimate Repair transaction billing type with 100% coverage could apply.

Viewing Service History

To best serve the customer, field service technicians should review the customer's service history prior to making a customer visit. Technicians can request service history for either a customer or a customer product. Only tasks and service requests that are closed or completed appear in the service history.

The amount of service history gathered for a customer is determined in customer setup. Here, the administrator determines how many service requests are used to create the service history. For example, the last three service requests may be compiled to create the service history.

Service history includes the following:

- Customer and contact details
- Product details (item or install base)
- Service request and task assignment details
- Reported labor, material, and expense for each customer visit
- field service technicians who previously visited the customer

Complete the following steps to view service history.

Steps:

1. Click the Show link in the Details column against the service request for which you want to view service history.

2. Click the Item link.

   This action launches the Item Instance page.

3. Click the Service tab.

   The service history appears.

Viewing and Changing Service Request Information

The service request contains practical information, including the problem and likely resolution.

Complete the following steps to view service request information:

Steps:

Viewing Information

1. Identify the task information related to the service request.

2. Click the Show link in the Details column of the technician's view, and then click the Service Request number link.

3. Alternative method

   Click the Update icon in the task row.

   This action launches the Update task page.

4. On the Update task page, click the Show Service Request link.

5. Click the Service Request Number link.

Changing Information

6. Identify the task information related to the service request.

7. Click the Update icon in the task row.

   This action launches the Update task page.

8. On the Update task page, click the Show Service Request link.

   Under the service request header you can change or enter the following information:

- Item Name
- Item Description
- Item Instance
- Serial Number of the item
- Service Tag
- Problem and Problem Summary
- Resolution and Resolution Summary

Task Creation

There may be times when you need to create a new or additional task for a service request. For example, if you cannot complete a task or need support from a fellow field service technician, then you should create an additional task.

There are two ways you can create a task:

- Based on an existing task that serves as a template
- Based on an existing service request, where you have to complete all the desired fields

Creating Task Based on Existing Task

Prerequisites

❒ A service request must exist.

❒ A task must exist.

Steps:

1. From the Fields Service Technician Dashboard, click the Update Task icon against the task for which a new follow-up task needs to be created.

   The Update Task page appears.

2. Click the Create Follow-Up Task button located in the top left corner.

   The Create Follow-up Task page appears. The fields in this page populate based on the respective field values in the existing task.

3. Update the field values as required.

4. (Optional) Technicians have the ability to assign the follow-up task to themselves by selecting 'Yes' in the 'Assign to me' field.

5. To create the follow-up task, click Apply.

   On the creating and assignment of the follow-up task to the technician, the follow-up task appears in the Field Service Technician Dashboard.

Creating Task Based on Existing Service Request

The existing service request could:

- Already be downloaded from the enterprise

- Be newly created in the Mobile Field Service Laptop application.

Prerequisites

❒ A service request must exist.

Steps:

Create Task for Service Request downloaded from the enterprise

1. Launch the existing Service Request page from the Field Service Technician Dashboard or from the Update Task page. See Viewing and Changing Service Request Information, page 5-45.

2. Click Create Task.

   The Create Task page appears. The fields in this page populate based on the data for the existing task for the same service request.

3. Update or modify the fields as required.

4. (Optional) Technicians have the ability to assign the follow-up task to themselves by selecting 'Yes' in the 'Assign to me' field.

5. Click Apply.

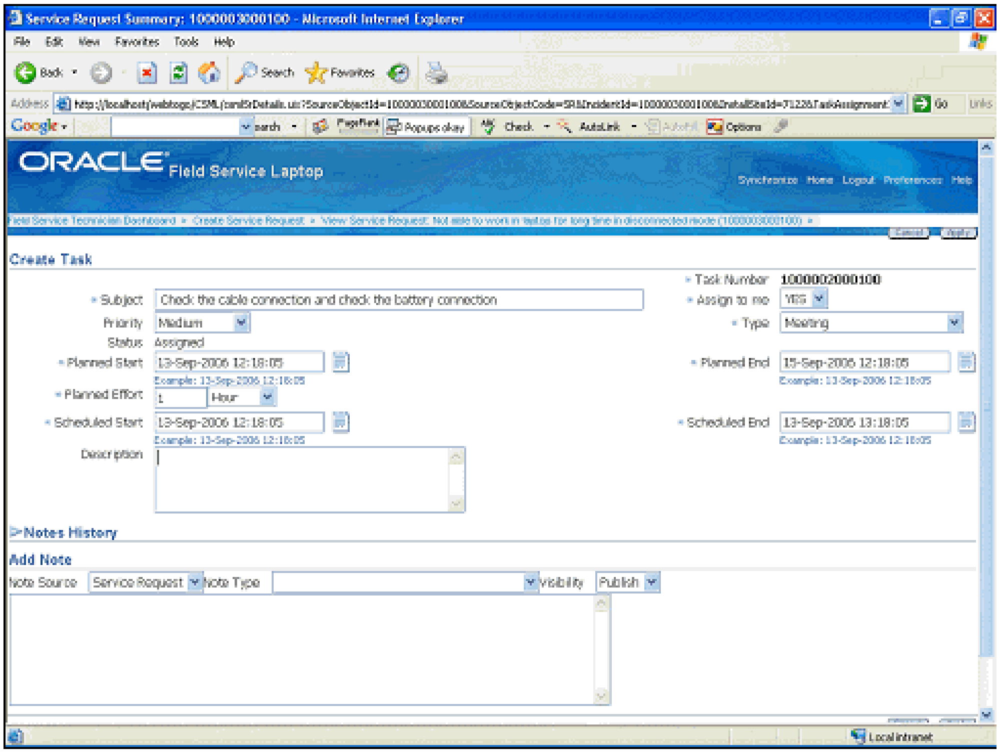
   The new task is created for the service request. On the creating and assignment of the follow-up task to the technician, the follow-up task appears in the Field Service Technician Dashboard.

Create Task for New Service Request

You can create tasks for the new Service Request.

6. Click Create Task.

   The Create Task page appears.



7. Complete the Description text box.

   The Planned Start and Scheduled Start fields are populated based on the system date and time. The Planned End time is populated based on the value set for the profile, 'CSFW: Planned Task Window'. The Scheduled End date and time are populated based on the effort value set for the task type.

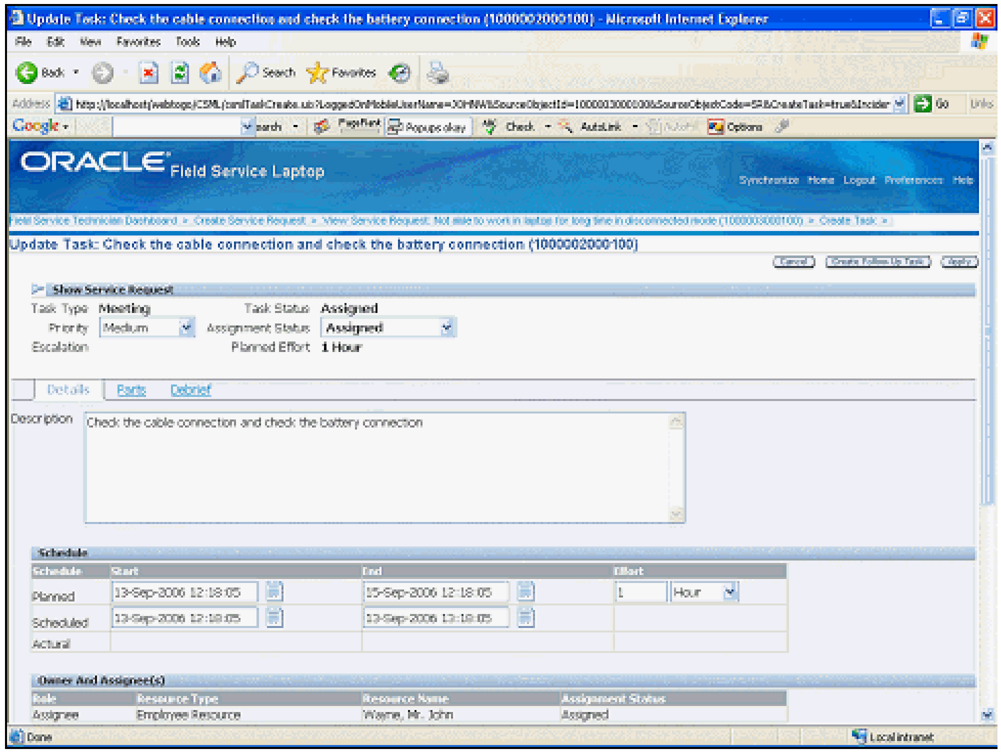
8. Update or modify the fields as required.

9. (Optional) Technicians have the ability to assign the follow-up task to themselves by selecting 'Yes' in the 'Assign to me' field.

10. To create the task click Apply.

    The Update Task <Description> window appears.

    9. On the creation and assignment of the task to the technician the follow-up task appears in the technician's dashboard.



11. To upload an attachment see Uploading Attachments, page 5-52.

12. To verify the service request and task, go to the Dashboard. The newly created Service Request and Task is available in the spread table of the Dashboard Main view.

Creating and Viewing Notes

You can create and view notes for the following:

- Customer
- Customer Product
- Service Request
- Task

Example

For example, you nay note that a power supply needs to be replaced by a refurbished one.

A note includes the following:

- Note text

- Date entered
- Note type
- Visibility

Complete the following steps to create and view a note:

Steps:

1. Open the appropriate page:
   - To create and view a service request note, from Field Service Technician Dashboard, click the Update Task icon against the Service Request.
   - To create and view a task note, from Field Service Technician Dashboard, click the Update Task icon against the Task.
   - To create and view a customer note, from Field Service Technician Dashboard, click the Update Task icon against the Customer.
   - To create and view a customer product note, click the Show link against the service request for the customer product, and then click the Item link against the Item Name. This action opens the item instance page. Click the Notes tab.
2. To view existing notes, click the notes history link arrow.

   This action shows all notes.
3. Click the Show link to view note details.
4. To add a new note:
   - Select the note source from the drop-down list.
   - Select the note type from the drop-down list.
   - Select the visibility from the drop-down list.
   - key in the text for the note in the text box.
5. Click Apply

Setting Counters and Counter Properties

You can log a service request for a customer product that contains a counter. A counter helps a field service technician determine how much work was done before a customer product was serviced. For example, a copier having a number-of-copies counter.

There can be multiple customer product counters, each with multiple readings. From these multiple readings, you can learn the service history of the customer product.

You can also create new readings for a customer product counter. You can reset a reading as well as make miscellaneous readings. A miscellaneous reading can be a value used for testing a customer product. For example, an technician who is fixing a copier may make ten test copies after completing the service. The copy counter value increases by ten, but the technician does not want the customer to pay for the test copies. Therefore, the field service technician can state a miscellaneous reading of ten.

Finally, you can enter counter properties. Counter properties describe something about the customer product counter.

Complete the following steps to enter a counter reading and set the counter properties:

Steps:

1. Choose the desired customer product for which you want to enter a counter reading and set the counter properties.

2. Choose the task associated to the customer product

3. Click the Update Task icon.

   The Update Task page appears.

4. From the Update Task page, click the Debrief tab

5. Alternatively, from the technician dashboard, click the Debrief icon.

6. Enter the new reading value in the Value field.

7. Provide the new reading comments in the Comments field.

8. To save the new value, click Apply.

9. Complete the Date and Reading fields.

   > **Note:** The Date and Reading fields are mandatory. The date is the date that you take the reading, and the reading is the counter value that to want to record.

10. Complete or change any other fields as desired.

11. To make miscellaneous readings, select from the Misc. Reading Type drop-down list, and then complete the Misc. Reading field.

12. To reset the counter, complete the Reset Reading field.

13. Complete the property field for the customer product.

14. Click Apply.

Viewing a Service Request Attachment

From the update task page you can open and view any attachment associated with a service request. The attachment can vary in type, such as a .pdf, .doc, .xls, and .gif.

To view a service request attachment:

Steps:

1. Navigate to the Update task page.

2. Click Show Service Request.

3. Click the File Name link located under the Service Request attachments.

   The Attachment page opens.

Uploading Attachments

Field Service technicians can upload service request attachments from their mobile devices. Technicians can add attachments to tasks and service requests. Uploaded data can be viewed at the enterprise after synchronization.

This feature assists technicians in capturing additional information related to task execution, such as diagnostic reports, images, photos, drawings and so on, that can be accessed at a later date.

Supported Attachment Types:

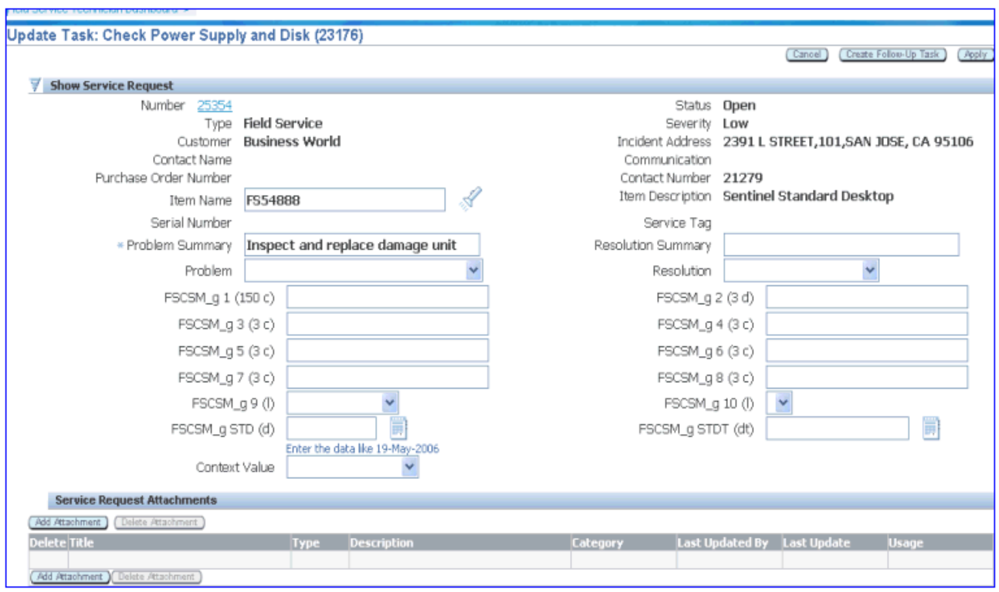
- Short Text Attachment
  - Add text up to 4000 characters.
  - Size is not limited by profile value.
- Web Page Attachment
  - Link a URL up to 4000 characters.
  - Size is not limited by profile value.
- File Attachment
  - Multiple files types are supported such as, .jpeg, .bmp, and .doc.

- Attachment size is limited by the CSM: Maximum Attachment profile value. The profile value represents the size of the attachment in megabytes (MB) for each task or service request per synchronization.
    - If the profile value is not set, the system determines the value as zero. The technician cannot upload or download file attachments.
    - If the attachment size is greater than the value set in the profile, then the application will generate an error message. The technician cannot upload the attachment.

Steps:

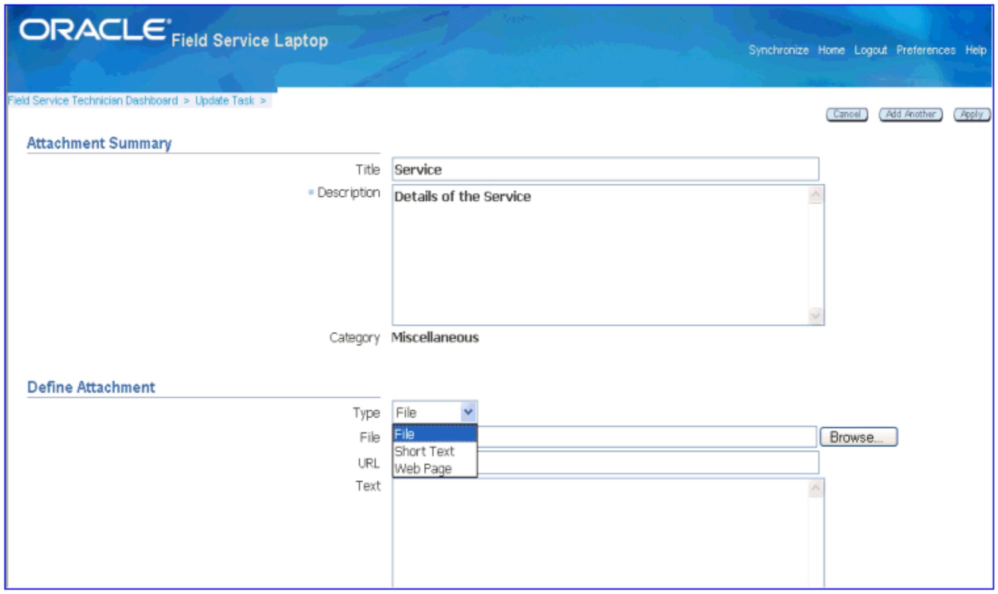
1. Navigate Field Service Technician Dashboard > Update task > Show service request.

   The Update Task window appears.



2. Click Add Attachment.

   The Attachment Summary page appears.



3. Complete the Title and Description fields.

4. If the attachment is a file, browse to and select the file.

5. If the attachment is a URL, enter the URL address. The limit is 4000 characters.

6. If the attachment is text, enter text up to 4000 characters.

7. Click Apply.

8. To save the attachment and proceed with another attachment, click Add Another.

9. To cancel the attachment, click Cancel.

10. To delete the attachments added, navigate:

    Field Service Technician Dashboard > Update task > Show Service Request

11. Select the attachment that should be deleted by checking the check box in the select column, and the click the Delete Attachment button located in the header.

    Note: Attachments can be deleted only before synchronization.

Logging Out

When you have finished working in Oracle Mobile Field Service/Laptop, log out of the application.

Do the following to log out of Oracle Mobile Field Service/Laptop:

Prerequisites

❒ Save all data and be ready to exit the application.

Steps:

1. 1. Click the Logout button in the upper right corner of any page.

   Oracle Mobile Field Service/Laptop checks that all data has been correctly saved and then closes. The application returns to the login page.

Part 4

Oracle Mobile Field Service Wireless and Voice

6

Understanding Mobile Field Service Wireless Option

This chapter covers the following topics:

- Introduction
- Overview of Mobile Field Service Wireless

Introduction

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

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

Oracle Mobile Field Service Wireless and Voice also provides the field service technicians 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.

Overview of Mobile Field Service Wireless

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

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

Mobile Field Service Wireless provides the most flexible, scalable and reliable mobile infrastructure. Using Oracle 10g Application Server (AS), Mobile 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 Mobile Field Service Wireless manages and delivers content by taking into account the screen size and input methods for the devices. Using the voice capabilities, field service technicians 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 service technicians can also update the current status of the tasks by using voice commands.

Oracle Mobile Field Service Wireless supports the following technology:

- Small Form Factor: This includes 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.

> **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.

Key Benefits

Oracle Mobile Field Service Wireless and Voice offers a complete solution to meet the needs of service organizations. Key benefits include the following:

- Enables a field service technician access to the 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 s.

- Provides faster billing cycle through remote capturing of counters and on-site invoicing.
- Enables flexibility in choosing devices.
- Provides dispatcher with real time status and action updates for all of their field technicians and their jobs.
- Provides secure communication while transmitting the data to and from wireless devices.

Key Features

The following is a list of key features in Oracle Mobile Field Service Wireless and Voice:

- Ability to capture Material debrief information via the voice module.
- Ability for the Field Service Technician's to schedule the task by selecting the following options:
  - Work on it: This option provides the technician with the ability to start working on the new tasks created right away.
  - Self-Schedule: This option provides the technicians with the ability to schedule the task for themselves for a date and time that is convenient to them later.
  - Windows to Promise: This option provides the technician with the ability to provide windows of time to the customer and let the customer choose the best option of date and time that suits them.

    Note: In the case of Windows to Promise option, the tasks would be assigned to any technicians who are available.

- Support for multiple responsibilities (ability to support custom responsibilities in addition to the seeded responsibilities).
- Support for internal location (ability to view and create tasks when the service request incident address is not a party site).
- Ability to choose between displaying images and buttons in the application.

About the Business Process

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

Oracle Mobile Field Service Wireless 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 technicians carry phones with them. A connection with the wireless network is necessary for the application to operate.

Mobile Field Service Wireless 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 representative.

   From this moment the field service technician can use the Oracle Mobile Field Service Wireless application to retrieve and update task and task-related information, to order parts, create new service requests, create follow-up tasks, and schedule them.

3. The field service technician logs into the Oracle Mobile Field Service Wireless application.

4. The field service technician retrieves their agenda for the current working day.

   If the current day is not applicable, the field service technician can choose another date. The date options are: tomorrow, yesterday, this week or enter a date. After the field service technician selects one of these options, this date becomes the current day.

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

   - View customer information.

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

   - View and update task information.

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

   - Submit the resolution of the task.

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

- Submit the change of task assignment status.

  Field service representatives can change the assignment status of a 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.

  The technician can order parts for a task.

- Perform an Advanced Parts Search.

  The technician can search for parts from their own sub-inventories, from coworker's sub-inventories, or from a field warehouse.

- Create service request and task.

  When the technician is at the customer site and if the customer reports a new problem, then the technician can create a service request on behalf of the customer.

  The technician can also create a task and assign the task to themselves by selecting: Work On It or Self Schedule options.

  Alternatively, the technician can also provide the window of time to the customer and enable them to pick a schedule time that is suitable for them. In this scenario, the task may or may not be assigned to the technician.

7

Using Mobile Field Service Wireless and Voice

This chapter documents how technicians can use the Oracle Mobile Field Service Wireless and Voice to access information, debrief tasks, create service requests and tasks, schedule tasks and order parts.

This chapter covers the following topics:

- Introduction
- Getting Started
- Viewing, Managing, and Updating Your Tasks
- Viewing Today's Tasks
- Performing a Task Search
- Updating an Existing Task
- Recording Counter Readings
- Adding Debrief Lines to a Task
- Capturing Customer Signature
- Creating a Service Request
- Creating a Service Request from the Main Menu
- Creating a Follow-Up Task
- Self-Assign or Self-Schedule Tasks
- Starting Self-Assigned Tasks Immediately
- Self-Scheduling Tasks
- Using Window to Promise to Schedule Tasks
- Viewing Install Base Product Configuration
- Ordering Parts

- Performing an Advanced Parts Search
- Using Radius Search Capabilities
- Creating an Internal Transfer
- Creating a Move Order
- Creating an Internal Order
- Viewing Orders In
- Viewing Orders Out
- Accessing the Knowledge Base
- Searching the Knowledge Base from the Main Menu
- Viewing and Saving an Offline Schedule
- Viewing the Excess Parts List
- Managing Receipt of Parts

Introduction

Oracle Mobile Field Service Wireless and Voice enables field service technicians access to information necessary to perform work at a customer's site.

Not only can technicians view their daily schedules of tasks, they can also perform many other functions, such as ordering parts, creating and scheduling follow-up tasks, creating service requests, and accessing the Knowledge Base for potential solutions to common customer issues. The Oracle Mobile Field Service Wireless application also allows technicians to access their daily schedules of tasks even when not in the network service area.

Optionally, technicians can use Mobile Field Service Wireless to get directions to a job site.

User Interface

The Mobile Field Service Wireless application provides a consistent user experience through a common look and feel (same color palette, same art direction), and through similar interaction behaviors.

Support for Blackberry™ Devices

The Mobile Field Service Wireless application user interfaces are certified for use in Blackberry™ devices. As the device does not support the horizontal bar, input pages are changed to linear format from the tabular format.

Example

Examples:

- Create new Service Request page

- Create Follow up Task page

Pages containing tables are provided with width for the columns.

Example

Examples:

- Task Search result page
- Part Search result page

Choose between Images and Buttons

The Mobile Field Service Wireless application provides you the ability to choose between images and buttons for the user interfaces. The value of the Profile Option CSFW:Use Icons for buttons determines whether icons or buttons appear:

- If the Value of this profile is: Yes, then icons appear.
- If the Value of this profile is: No, then buttons appear.

For more information about setting Profile Options, see the *Mobile Field Service Implementation Guide.*

Dependencies

Mobile Field Service Wireless and Voice has these dependencies:

- 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 comparative list of the functionality available for Medium Form Factor, Small Form Factor (WAP) and Voice-enabled devices, see the Appendix.
- To use the Order Part and Parts Search functionality, you must enable the Spares Management module of Field Service. For detailed information about the Spares Management functionality, see the *Oracle Field Service Spares Management User Guide.*
- To use the Knowledge Base integration, you must install the Knowledge Management application. For detailed information on Knowledge Base functionality, see the *Oracle Knowledge Management User Guide.*
- Material debrief using Voice is dependent on Oracle 10g AS (Wireless) and Voice XML gateway. Profile option settings are documented in the *Oracle Mobile Field Service Implementation Guide*.

Multiple Responsibilities

Multiple responsibilities features can be applied to fulfill the following needs:

- Assign a different transition task status to different responsibilities.

  The Task Status and Transition Rule are assigned to a specific responsibility. The business requirement of applying different rules for different field service users, can be accomplished by creating new responsibilities and new rules, and then attaching them to each other.

- Customized menus.

  The business requirement of restricting some functions provided in the Field Service Wireless menu, can be accomplished by creating a custom responsibility with certain restricted functions excluded.

  Example

  For example, if 'Get Direction' or 'Knowledge Base' functionality should not be provided to specific users, then a custom Field Service Wireless responsibility can be created with these functions excluded. Then this custom responsibility can be attached to specific users.

Getting Started

In order to use Mobile Field Service Wireless, 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, they must log into the application with the username and password that was created for them 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 links:

- 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, that will return the technician to the Oracle Application Login page.

To navigate through the user interface (UI), the technician will use standard point-and-click functionality. The Mobile Field Service Wireless application 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 list of value (LOV)-enabled.

When a technician logs into the Mobile Field Service Wireless application, the home page main menu might 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.

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.

Viewing, Managing, and Updating Your Tasks

The Mobile Field Service Wireless application 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. The Mobile Field Service Wireless application enables technicians to quickly view those tasks they're scheduled to perform today and also enables 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 that displays depends upon the settings entered in the CSFW: Task Display 1 and CSFW: Task Display 2 profile options.

Example

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 Setting Profile Options for

Task Summary Display, Date Format. For more information on setting all Wireless profile options, see Profile Options.

The following task-related procedures are available to a field service technician through the Mobile Field Service Wireless application:

- Viewing Today's Tasks
- Performing a Task Search
- Updating an Existing Task
- Creating a Service Request
- Creating a Follow-Up Task
- Viewing Install Base Product Configuration

Viewing Today's Tasks

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

Prerequisites

❒ A task must be assigned to the resource.

Steps:

1. Field Service Wireless responsibility. 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 for that day. The tasks are displayed based upon the Task Display profile option and appear as hypertext links.

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

   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 will display 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, and so on) 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, that was entered on the service request. If the customer contact has an email address, you can click the email address and create a message by entering a Subject and a 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 that are attached, and also enables 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.

   > **Note:** 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 Update an Existing Task.

Performing a Task Search

Use this procedure to perform a task search.

Prerequisites

❒ A task must be assigned to the resource.

Steps:

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

   The Task Search screen opens. 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
- Service Tag

2. Choose an Assignment Source for the search.

   The options are:

   - Open Tasks
   - Assigned Tasks
   - Created Tasks

3. Click OK to perform the search.

   If you want to view 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. The results that display are dependent on the settings 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 opens. From this page you can view and update various task details just as you can while viewing task details from the Today's Task menu option.

Updating an Existing Task

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

You can make several updates to an existing task. The updates you can make include: updating the task assignment status, adding notes to the task, adding debrief lines, updating additional task information, and updating the scheduled start date and time.

> **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. 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.

Once you have retrieved a task's details, use the following procedure to update the task assignment status and to add notes. For a flow diagram of voice commands to change the status of a task, see Changing Task Status, page B-32.

Prerequisites

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

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.

   Main Menu > Task Search > Task Details

   Main Menu > Today's Task > Task Details

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

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

   > **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 they want to "Capture Readings for the Following Counters?" and lists the products. See the Guidelines below for details.

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 from the drop-down list.

   For example, Callback, Conversation, Date Change, and so on).

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 "(2)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.

   > **Note:** If there are products requiring counter readings associated to the service request for which a task assignment is being completed, then the Mobile Field Service Wireless application 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.

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 to record counter readings.

For a flow diagram of voice commands to capture counter readings, see Capturing Counter Readings, page B-34.

Steps:

1. From the Task Details page, choose Counters from the drop-down menu.

   The Counter details screen opens and displays the product name and the Current Reading.

2. In the New Reading field, record the counter reading for the product.

3. Optionally, enter a Reset Reason.

4. Optionally, enter a Reset Reading.

5. Click Done when you have finished recording the counter readings.

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 Mobile Field Service Wireless application leverages the 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 lists the required fields for each type of 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 Mobile Field Service Wireless application, you can set a profile option "CSF: Allow Overlapping Times" to determine whether or not you want to enable 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.

The Mobile Field Service Wireless application 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 a flow diagram of voice commands to create a debrief, see Creating a Labor Debrief, page B-33.

Capturing Customer Signature

The Mobile Field Service Wireless application enables 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:

PDA Device Name	Specifications
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. The screen 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 form text in the Resolution Summary text box.

   This information is reflected back on the Service Request form in Oracle Teleservice and displays 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 to 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, in other words, 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.

   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.

   Example

   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.

Creating a Service Request

One of the advantages that the Oracle Mobile Field Service Wireless application 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 at a customer site.

This option is available from either:

- A request number link from the Service Request Details information page, as documented in the following procedure, or
- The main menu. See Creating a Service Request from the Main Menu, page 7-15.

When creating a service request for the same customer while servicing a particular task, the Mobile Field Service Wireless application defaults key information, such as customer name, address and contact name, if any. The customer name and address cannot be edited.

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

After the service request 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. After a service request is created with an associated task, it is picked up by the dispatch center and can scheduled, either manually or through Oracle Advanced Scheduler.

The technician also has the following options to schedule and assign the tasks to themselves:

- Done
- Work On It
- Self Schedule
- Windows to Promise

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.

Steps:

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

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

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 also appear by default, 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 service request was successfully created. The Request number screen is opened and, at this point, you can add Notes to the service request 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 for 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 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 Creating a Follow-Up Task, page 7-15 for details.

12. Click OK.

    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 Mobile Field Service Wireless application main menu. In this case, you must provide all the relevant customer information.

Creating a Service Request from the Main Menu

Technicians can also 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. The Mobile Field Service Wireless application can fill in the appropriate information if you know any of this information.

Creating 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 them self.

In these cases, a technician can create a follow-up task through the Mobile Field Service Wireless application. When a technician creates a follow-up task:

- the dispatcher manually assigns the task, or
- the technician self-assigns the task, or
- the technician can work on it right away, or
- the technician can provide time window options to the customer to schedule the task according to their preference, or
- the task is assigned automatically through Oracle Advanced Scheduler.

The task is automatically associated with the customer that the original task was assigned to. 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 the 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 appears by default 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.

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.

   Main Menu > Task Search > Task Details

   Main Menu > Today's Task > Task Details

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

   The Follow Up Task screen opens with the Customer name and Request Number appearing from the original task. The Status of the task appears by default 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.

    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 the appropriate information.

Self-Assign or Self-Schedule Tasks

Technicians can self-assign and self-schedule tasks and follow-up on tasks from wireless PDA devices. Task scheduling and assignment from mobile devices supports the following business cases:

- Work On It: Self-assign and begin work right away.

  When technicians have the necessary skills, parts, and calendar availability to work on the task right away, they can choose the Work On It option. Since scheduling is not needed, Advanced Scheduler is not required to be implemented for this option.

  See Starting Self-Assigned Tasks Immediately, page 7-18.

- Self Schedule: Self-assign and start work at a later date.

  Technicians can choose the Self Schedule if the technician cannot begin work on the created task or follow-up task right away, and wants to come back latter to complete the task. When this option is selected, the technician is presented with a list of available schedule options. The Technician can choose a schedule option to self-assign the task. This option requires Advanced Scheduler to be implemented.

  See Self-Scheduling Tasks, page 7-19.

- Window-to-Promise: This option provides a list of available time slots, or "windows" for customer selection. This option requires Advanced Scheduler to be implemented.

  Note: The Window to Promise option does not guarantee that the same technician will return to do the work.

See Using Window to Promise to Schedule Tasks, page 7-21.

Starting Self-Assigned Tasks Immediately

Use this procedure to start work on a self-assigned task right away:

Prerequisites

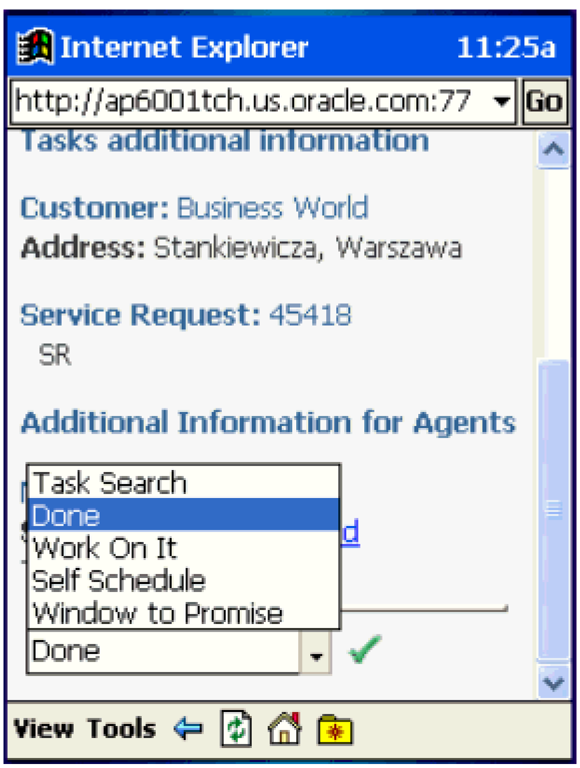
- ❒ A service request must exist. See Creating a Service Request, page 7-13 or Creating a Service Request from the Main Menu, page 7-15.
- ❒ A task or follow-up task must exist. See Creating a Follow-Up Task, page 7-15.

Steps:

1. Select a task from the Today's Tasks list.

   See Viewing Today's Tasks, page 7-6.

2. Select the Work On It option from the drop down menu, and then tap OK.

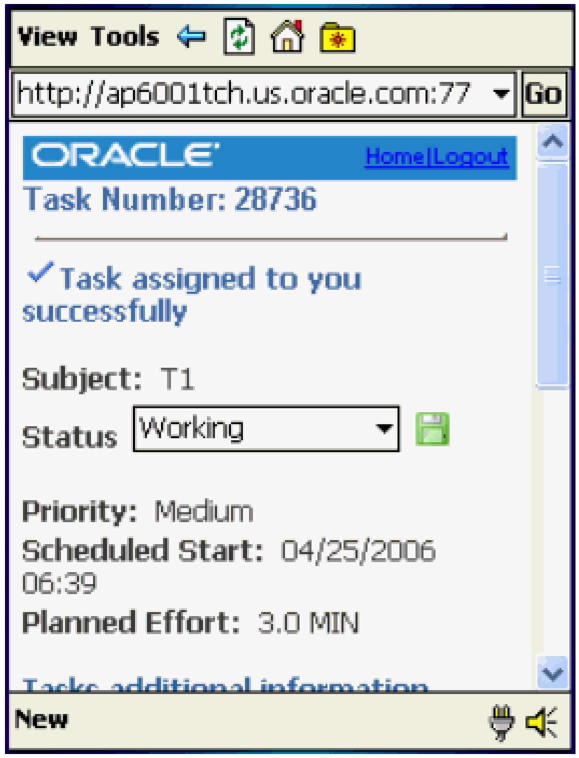


The task is assigned to the technician. The technician can begin work on the task.

When the task is assigned, the task assignment status ID will appear by default from the profile option CSF: Default Working Task Status setting. See the *Oracle Mobile Field Service Implementation Guide.*

Example

For example, the task status is set to "Working".



Self-Scheduling Tasks

In this option, the technician selects from the scheduling options provided by the system. The task is assigned to the technician.

Use this procedure to Self-Schedule a task:

Prerequisites

- ❒ Advanced Scheduler must be implemented.
- ❒ A service request must exist. See Creating a Service Request, page 7-13 or Creating a Service Request from the Main Menu, page 7-15.
- ❒ A task or follow-up task must exist. See Creating a Follow-Up Task, page 7-15.

Steps:

1. Select a task from the Today's Tasks list.

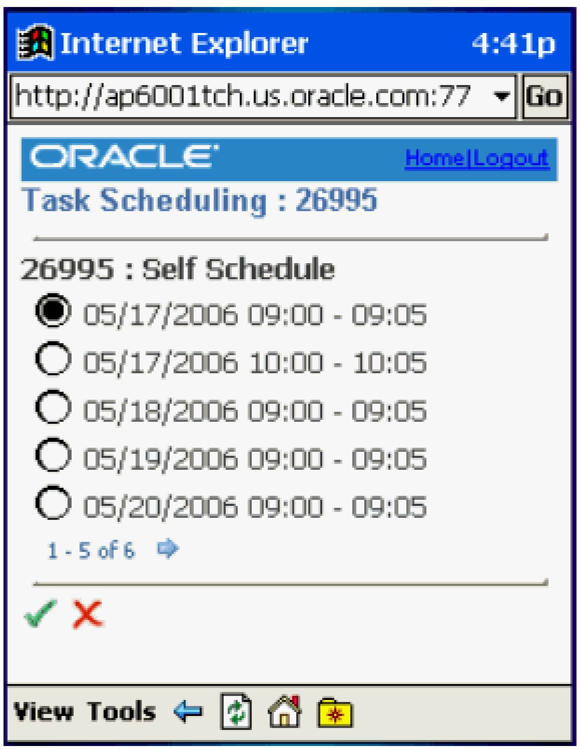
   See Viewing Today's Tasks, page 7-6.

2. Select the Self Schedule option from the drop down menu, and then tap OK.

   > **Note:** Alternatively, when a created task already exists in the device with the task status of "In Planning", the technician can search for the task, select the task, and then select the Self Schedule option.
   >
   > See Performing a Task Search, page 7-7.

   Selecting the self schedule option provides the technician with several schedule options. The plans appear in ascending order according to cost.

   The plan options that display depend on the value set for the Profile Option CSFW:Task Max. *See the Mobile Field Service Implementation Guide.*

3. Once the technician selects a schedule option, the task is assigned to the technician.

4. When the task is assigned to the technician the task assignment status changes, depending on the value of the profile option "CSF:Default Working task status". *See the Mobile Field Service Implementation Guide.*

Using Window to Promise to Schedule Tasks

Using the window to promise option, the technician provides the customer with plan option time slots, or "windows", to choose from. When the customer selects a window plan option, based on the plan option selected, and availability of resources and parts for the plan option selected, the dispatcher assigns a technician for the task. The same technician may or may not be assigned for the task.

Use this procedure to use the windows to promise option to schedule tasks:

Prerequisites

❒ Advanced Scheduler must be implemented.

❒ A service request must exist. See Creating a Service Request, page 7-13 or Creating a Service Request from the Main Menu, page 7-15.

❒ A task or follow-up task must exist. See Creating a Follow-Up Task, page 7-15.

Steps:

1. Select a task from the Today's Tasks list.

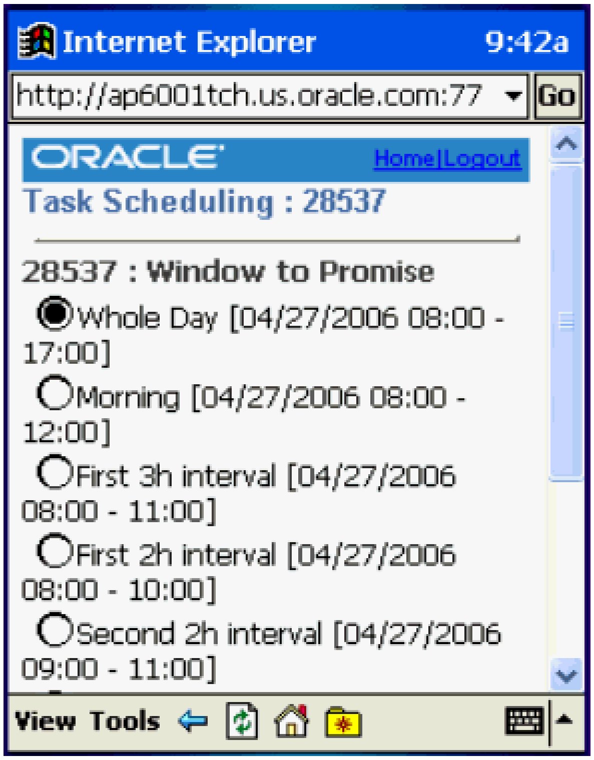
   See Viewing Today's Tasks, page 7-6.

2. Select the Window to Promise option from the drop down menu, and then tap OK.

   > **Note:** Alternatively, when a created task already exists in the device with the task status of "In Planning", the technician can search for the task, select the task, and then select the Self Schedule option.
   >
   > See Performing a Task Search, page 7-7.

   Selecting the window to promise option provides the technician and customers with several windows of time. The plans appear in ascending order according to cost.

   The plan options that display depend on the value you set for Profile Option CSFW:Task Max. *See the Mobile Field Service Implementation Guide.*



3. Once the customer selects an option, the task is assigned to the technician available for the windows option selected.

4. When the task is assigned the task assignment status changes, depending on the value of the profile "CSF:Default Planned task status for Planned task". *See the Mobile Field Service Implementation Guide.*

Viewing Install Base Product Configuration

The Oracle Mobile Field Service Wireless application 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 Mobile Field Service Wireless application will enable 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 is comprised of several other related components (monitor, hard drive, modem, and so on), then the install base view enables a technician to view the relationship between all of these components.

The wireless application provides support for internal assets. This functionality was developed to cater to the needs of the field service organizations that can provide service to internally owned assets as well as to customer products.

Example

Typical examples of this case include:

- Demo or training equipment.
- Dispersed/Mobile assets, such as cell telephone towers.
- Mobile MRI vans.
- Leased copying machines.

Technicians can create tasks even when the service request incident address does not refer to a party site. This extends support for service of assets in locations that are not owned by or assigned to a specific party.

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 the Install Base.

Steps:

1. Navigate to the Task Details page.

   Main Menu > Task Search > Task Details

   Main Menu > Today's Task > Task Details

   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.

Ordering Parts

Using the Mobile Field Service Wireless application, you can order parts to replenish a technicians trunk stock or to fill a specific need for a particular customer. Ordering parts using this application 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 Available to Promise (ATP) functionality of Advanced Supply Chain Planning, an internal order is created.

An internal order to fill a parts requirement enables you to ship the necessary parts to a field technician at the specified "ship to" address. You can check for part availability within the supply chain and, if the part is not available, you can also check if there are any alternate parts. These include both substitute and superseded 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 enable 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 Mobile Field Service Wireless application:

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.

Steps:

1. Navigate to the Part Order window.

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)

2. Once you open the Order Part screen, choose the part that you want to order from the Item field list of values.

3. The Description field defaults from the item that you choose.

4. 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.

5. Enter the Quantity of parts that you are ordering.

   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:mm. So, for example, to enter a Need By Time of 5 p.m., type 17:00.

8. Click Submit to 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.

Performing an Advanced Parts Search

The ability to find parts quickly is a critical element of a successful field service operation. The Oracle Mobile Field Service application 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 Mobile Field Service Wireless application enables the technician to make an internal transfer, create a move order transfer of parts, or to create an internal order.

The Mobile Field Service Wireless application leverages Oracle Spares Management's advanced parts search functionality, including the consideration of alternative or superseded parts in the search. Optionally, the Mobile Field Service Wireless application also uses the Oracle Field Service's geo-coding element to locate the nearest technician 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 the order, either through your own alternative sub-inventories, a coworker's sub-inventory, or the warehouse. Once you have located the parts, the next step is to place an order.

The parts ordering methods available in Mobile Field Service Wireless are:

- **Internal Transfer:** Use this method when moving parts from one of your own alternative sub-inventories to the default sub-inventory.

- **Move Order:** Use this method when requesting parts from a coworker's sub-inventory. This method requires that a coworker have at least one sub-inventory in the same organization as the technicians default sub-inventory.

- **Internal Order:** Use this method when requesting parts from a central warehouse.

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

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

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

Using Radius Search Capabilities

The Mobile Field Service Wireless application leverages Oracle's geo-coding capabilities, which gives technicians the ability to limit the search for parts from coworkers' trunk-stock to those coworkers who are within a specified radius. Radius search is an optional feature of the Mobile Field Service Wireless application. The measurement unit is set with the profile option "CSFW: Default Distance Unit," which enables you to set the distance unit for measurement purposes. The available values are: Mile or Kilometer.

To use the radius search capabilities, one of the technicians task must be in an assignment status of "Working" and the customer site must have a valid geocode address. This enables the geo-code to determine where to begin the radius search. For coworkers to be considered in this search, they must also have valid geo-code installed at addresses.

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

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 geo-code functionality must be implemented.

Steps:

1. Navigate to the Parts Search screen.

   Main Menu > Part Search

   Main Menu > Task Search > Task Details > Part Search

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

2. Choose the Part Number, of the part you want to search for.

   The part description will appear by default. 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 check box.

4. Enter 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 the parts by choosing the appropriate check boxes.

   The options include: Warehouse, My Sub-inventories, My coworkers. You can choose any number of the three to search.

7. Click Search to begin the search.

   The Search Results screen displays all the sub-inventories and warehouses that fit the criteria. The spreadtable is separated into the Warehouse entries, My coworkers, and the technician's other sub-inventories.

Creating an Internal Transfer

In many field service operations, a technician may have multiple sub-inventories assigned to him within the same organization. The Mobile Field Service Wireless application enables a technician to search all sub-inventories that reside in the same organization as the default sub-inventory for available parts. If a technician performs a parts search and finds that the necessary parts are in one of his other sub-inventories, he can create an internal transfer.

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.

> **Note:** In order to create a move order, the coworker's sub-inventory most be in the same organization as the technician's default sub-inventory.

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 coworkers, it must be properly installed.
- ❒ 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 part 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 sub-inventory and the quantity of parts.

3. In the Destination field, choose the sub-inventory that you want to receive the move order parts shipment.

4. Add any comments you want to the move order.

5. Click Create.

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

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 sub-inventory.

You can include substitute and superseded parts in the search by checking the Alternate Parts check box.

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

When performing an advanced parts search, the Mobile Field Service Wireless application 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.

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 military clock and should be represented as hh:mm. So, if you need the parts at 8 a.m., enter 08:00.

6. Click Submit to create the internal order.

   If you do not have ATP functionality enabled, the Mobile Field Service Wireless application 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.

Viewing Orders In

The Orders In link in the Mobile Field Service Wireless application enables a technician to view all part orders that are coming into the technicians sub-inventories. This functionality displays the part orders for all of the technicians sub-inventories that reside in the same organization as the one their default sub-inventory is located in.

The Orders - In view displays Move Orders and Internal Orders that are scheduled for the technicians trunk stock. The spread table 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.

Steps:

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

   Main Menu > Orders - In

   This view displays the spread table listing 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 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 spread table.

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

Viewing Orders Out

The Orders Out link in the Mobile Field Service Wireless application enables a field service technician to view all move orders that are outgoing of a technician's sub-inventory. Outgoing part orders are orders from the technician's sub-inventory to another technician's sub-inventory.

A technician can perform these actions on part orders from the Orders Out screen:

- View the order details.
- Reject the order if he doesn't want to 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 spread table displays all the move orders or transfers in progress for the technician. The attributes that display are the part order number, the item number, the quantity of the order and status of the order.

Use the following procedure to view orders that are going out.

Steps:

1. Navigate to the Orders - Out screen.

   Main Menu > Orders - Out

   The Orders - Out screen displays a spread table listing 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, and the date the move order was created.

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.

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 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 Mobile Field Service Wireless application.

Through the Mobile Field Service Wireless application, you can perform a general knowledge base search, or you can perform a search related to a specific service request. In the latter scenario, once you choose a Knowledge Base solution, you can manually attach it to the service request and it can be viewed at any time.

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

The Mobile Field Service Wireless application supports two search methods: Keyword Search and Search by Category. If you are searching the knowledge base for a specific service request, the Service Request 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*.

> **Note:** The Mobile Field Service Wireless application only supports text-based messages. Any Knowledge Management solution that contains dynamic links or HTML pages will not display in the search results.

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

Prerequisites

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

Steps:

1. Navigate to the task in which you want to perform a knowledge management search on.

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

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, that is populated with the SR Summary information, and also the Keyword Solution table with all the solutions that are associated with the 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 experiencing, 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 Knowledge Base solution, click Done to exit.

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

Searching the Knowledge Base from the Main Menu

You can search the Oracle Knowledge Management application from the Main Menu of the Mobile Field Service Wireless application, including performing a category search.

Use the following procedure to search the Knowledge base from the Main Menu.

Prerequisites

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

Steps:

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

   Main Menu > Knowledge Base

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

2. To perform a category search, click the Categories hypertext link.

   The Category Home page opens. All categories that you have set up in Knowledge Management (for example, computers, appliances, copiers, and so on) appear under the Sub-Category heading.

3. To search on one of the sub-categories, click the hypertext name of the category you want to perform a search on.

   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.

Viewing and Saving an Offline Schedule

The Oracle Mobile Field Service Wireless application 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 task assignments and their related information for a particular date on their wireless device. The field service technicians 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 re-save the offline schedule.

Use this procedure to view and save offline schedules.

Steps:

1. Navigate to Today's Tasks.

   Main Menu > Today's Task

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 the 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.

Viewing the 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.

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

The following information displays on the excess parts return user interface:

- Created On: This is the date the list was created.
- Subinventory: This identifies the subinventory that contains the excess part.
- Condition: This displays whether 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 executed in Spares Management.

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

Use the following procedure to view the excess parts list.

Prerequisites

❒ You must have Oracle Field Service Spares Management fully implemented.

Steps:

1. From the Main Menu, click Excess Returns.

   Main Menu > 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.

Managing Receipt of Parts

The Oracle Mobile Field Service Wireless application gives technicians the capability to view, confirm, and log as "completed" all their incoming part 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, technicians can view a list of all shipments, which includes the shipment number, what organization the shipment came from, and the date shipped. By clicking a particular shipment link, the technician can view the details about that shipment.

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

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

Steps:

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

   Main Menu > Receive Parts

   A list of incoming shipments is displayed.

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

   The Shipment Details screen opens. This screen 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 check box of all the shipments you have received and click Receive Complete.

Part 5

Oracle Mobile Field Service Notifications

8

Using Mobile Field Service Notifications

Using Notifications

All of the Oracle Mobile Field Service applications (Oracle Mobile Field Service Pocket PC, Laptop, and Wireless and Voice) leverage Oracle Workflow to send task related notifications to technicians. Using Workflow you have the ability to send notifications to technicians when activity has occurred against high priority tasks that are associated to those technicians. Oracle provides three seeded task notifications but you can define additional notifications to meet your business requirements. The notifications that are provided are:

- New task assignment
- Task assignment deletion or cancellation
- Task rescheduling

The notifications that are sent to the technicians can be in several different formats. Formats include email, fax, or SMS (short messaging). These notifications provide the technician with all the details associated with the task that they are being notified about.

> **Note:** The process that converts a message to SMS is handled by third party software. Workflow does not provide this functionality.

To use the notifications functionality, you must perform some setup. After you set up notifications, the system will immediately begin to send notifications of new task assignment, task assignment deletion or cancellation, and task rescheduling to the technicians depending on how you set up the notifications.

Follow this procedure to set up the notifications process:

Prerequisites

❒
- Oracle Workflow has been implemented and setup.
- Field Service Alerts and Notifications is setup and complete.

For more information on Oracle Workflow, see the *Oracle Workflow Administrator's Guide and the Oracle Workflow User's Guide.*

To Set Up Notifications:

1. If using email, define the proper email address for the technicians:
   - Enter the email address for the technicians using the HRMS Employee windows.
   - If a Supplier Contract resource, enter the email address in the Supplier Contract details windows.
2. Run the Synchronize Workflow Roles concurrent program on a periodic basis.

   When a resource is created or updated, the resource information including the email address, is stored in both Resource Manager and the corresponding Workflow role tables. Notifications can only be sent to all resources stored in Resource Manager that are in sync with the data stored in the Workflow roles tables. Resource Manager administrators must run this program on a periodic basis.
3. If using email, define the email style (HTML or text) for each technician using the Preferences window.

   Navigation: Preferences SSWA > Preferences > Notification (Email Style)
4. Define the Profile Options associated with this functionality:
   - CSF: Default Accepted Task Status: The system will change the task assignment status to this status when selecting the **Accept** option from the notification.
   - CSF: Default Rejected Task Status: The system will change the task assignment status to this status when selecting the **Reject** option from the notification.
   - CSF: Alert Send Preference: The system uses this profile to calculate the send date for the notification. Values are:
     - During Shift: A notification will be sent immediately if the current time is within the shift duration. Otherwise, it will be sent at the beginning of the next day's shift start time.

       The profile CSF: Alert before shift begins in minutes will determine the number of minutes before the next day's shift that the notification will be sent.

  - Immediate: A notification will be sent immediately. The system will ignore the profile option CSF: Alert before shift begins in minutes.
  - Scheduled Day: A notification will be sent immediately if the task is scheduled for today. Otherwise, will the notification will be sent at the beginning of the task's scheduled day's shift start time minus the value for the profile CSF: Alert before shift begins in minutes.

- CSF: Alert before shift begins in minutes: The system uses this profile to determine the number of minutes before a shift start that a assignment notification should be sent to the technician.
- CSF: Alert Task Priority Level: Notifications will be sent only to tasks specified at this priority or above.
- CSF: Alert Response Due Time In Minutes: The timeout in minutes for the first create assignment notification.
- CSF: Alert Reminder Response Due Time in minutes: The timeout in minutes for the reminder create assignment notification.
- CSF: Enable Alerts: This value determines whether a technician receives Field Service alerts and notifications.
- CSF: Alert Auto Reject: The assignment should be rejected if the technician does not take any action on the notification before the due date.

5. Create a Background Engine request for an Item Type **Field Service Task Assignment Alerts** from the Oracle Application Manager Workflow Manager. Set the concurrent program to run on a periodic basis.

   Navigation: Login as a system administrator. System Administrator > Workflow: Oracle Applications Manager > Submit Request for Background Engines

A

Scheduling and Completing Tasks

This appendix covers the following topics:

- Introduction
- Conform to the Schedule
- Order of Task Completion
- General Operating Rules

Introduction

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

Conform to the Schedule

The field service technician can only work on one job at a time, and is given a schedule that the dispatcher plans. Take, for example, the following tasks:

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

The field service technician first needs to finish task 1 before going on to task 2. He needs to follow the pre-defined order that the dispatcher has set. The field service technician cannot reschedule a task, but he can reject a task.

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

Order of Task Completion

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

The field service technician can complete his scheduled tasks under different scenarios. Those scenarios are:

Scenario 1: Complete Scheduled Tasks in Pre-Determined Order

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

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

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

Scenario 3: Complete Multiple Scheduled Tasks in Any Order

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

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

General Operating Rules

This section describes some of the general operating rules of Oracle Mobile Field Service that may not be obvious. Some of these rules are based on the scenarios found in Order of Task Completion, page A-2.

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

- You can add notes, but you cannot update notes once they are completed.

- You can update and create debrief items for a task that does not have the status of completed or for a task that you have not yet synchronized with the enterprise system.

  Important: Synchronized debrief lines cannot be updated.

  See Understanding the Task List Screen, page 3-9 for a complete description of the task status flags.

- You cannot delete report items after they are synchronized.

- If several working tasks are synchronized in Scenario 1 or Scenario 2, you can work on both tasks until they are closed. Then you must handle your tasks in compliance to the profile setting.

- Scenario 1 will be the default when there is no profile set.

- Once you synchronize, you cannot update a signature.

- Once you complete or close a task, you cannot add counters.

- You cannot update counters.

B

Oracle Mobile Field Service Wireless and Voice Device Commands

Oracle Mobile Field Service Wireless and Voice is a voice-enabled application. 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.

This appendix covers the following topics:

- Wireless Tasks Supported by Voice Devices
- Key Task Flows Using Voice Devices

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

  - Confirm the Task Assignment Status
  - Request Details
  - Customer Details
  - Call Customer
  - Accept a Prefix
  - Counters
  - Counter Summary Screen
  - Counter Details
  - Counter Reading Entry
  - Accept New Counter Reading Entry
  - Debrief Summary
  - Update Resolution Code
  - Service Activity code for Expense and Labor Debrief
  - Expense Item and Expense Amount for Debrief
  - Labor Item and Labor Duration for Debrief
- Grammar File for Voice Material Debrief
  - Type of Transaction List of Values (LOV)
  - Service Activity Code LOV
  - Sub-inventory LOV
  - Item Number LOV
  - Serial Number LOV
  - Parent Product LOV
  - Recovered Product LOV
  - Return Reason LOV

- Confirm Material Debrief

- Grammar for All Alphanumeric Entries
  - Alpha Digit Entry or Digits Entry
  - Search Confirmation
  - Search Results

- Grammar for Voice Travel Debrief
  - Confirm Travel Debrief

- Grammar for Listen and Delete Debrief Lines
  - Listen Debrief
  - Confirm Delete Debrief Line

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

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

Action	Speech Grammar	DTMF Grammar
+ 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
+ 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

Action	Speech Grammar	DTMF Grammar
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	{previous} {view previous} {go to previous} {previous tasks} {previous day}	1
Tomorrow	{next} {view next} {go to next} {next tasks} {next day}	2
Today	{current} {view current } {go to current} {current tasks} {current day}	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

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

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 enables 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 enables 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 enables 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}	#

Action	Speech Grammar	DTMF Grammar
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
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}	#

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

Change the Task Assignment Status

This activity enables 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}	n/a
Main Menu	{main menu}	n/a
Repeat	{repeat}, {repeat task}	66
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a

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

Confirm the Task Assignment Status

This activity enables 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 enables 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
Repeat	{repeat}	66
Last	{last}	7
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 enables 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
Repeat	{repeat}	66
Last	{last}	7
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}	*

Accept 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 enable a user to capture the 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}, {repeat task}	66
Touchtones	{touchtones}	#
Help	{help}	0
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

Action	Speech Grammar	DTMF Grammar
Repeat	{repeat}, {repeat task}	66
Touchtones	{touchtones}	#
Help	{help}	0
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 what 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

This activity accepts the new counter reading.

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

Action	Speech Grammar	DTMF Grammar
Tutorial	{tutorial}	n/a
+ 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 enables 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
Material Debrief	{material} {Add material}	4
Travel Debrief	{travel} {travel debrief} {travel capture}	5
Listen Labor Lines	{details labor}, (listen labor}, {details labor lines}	6
Listen Expense Lines	{details expense}, (listen expense}, {details expense lines}	7
Listen Material Lines	{details material}, (listen material}, {details material lines}	8
Task Details	{task details}, {cancel}	*
Main Menu	{main menu}	n/a

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

Update Resolution Code

This activity enables 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
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Touchtones	{touchtones}	#
Help	{help}	0
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 enables 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
Touchtones	{touchtones}	#
Help	{help}	0
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 enables 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

Action	Speech Grammar	DTMF Grammar
Expense Amount	{amount in currency}	Number
Debrief	{debrief}	*, Maximum Status DTMF GRAMMAR + 1
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Touchtones	{touchtones}	#
Help	{help}	0
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 enables 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 Time	{end time of labor am/pm/hours}	HHmm

Action	Speech Grammar	DTMF Grammar
Debrief	{debrief}	*, Maximum Status DTMF GRAMMAR + 1
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Touchtones	{touchtones}	#
Help	{help}	0
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.

Grammar File for Voice Material Debrief

Type of Transaction List of Values

Action	Speech Grammar	DTMF Grammar
Install	{install} {install material}	1
Return	{return} {return material}	2
Change Install Service Activity Code	{change install}	3
Change Return Service Activity Code	{change return}	4
Change usable sub inventory	{change usable sub inventory} {usable}	5
Change defective sub inventory	{change defective sub inventory} {defective}	6

Action	Speech Grammar	DTMF Grammar
Debrief	{debrief} {cancel}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

Service Activity Code List of Values

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} {cancel}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt service activity code until the user reaches the end of the available items.

Sub Inventory List of Values

Action	Speech Grammar	DTMF Grammar
Sub Inventory 1	{Sub Inventory name 1}	1
Sub Inventory 2	{Sub Inventory name 2}	2
+ Sub Inventory 3	{Sub Inventory name 3}	3
Debrief	{debrief} {cancel}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt sub inventories until the user reaches the end of the available items.

Item Number List of Values

Action	Speech Grammar	DTMF Grammar
Assigned Product 1	{one}	1
Assigned Product 2	{two}	2
+ Assigned Product 2	{three}	3
Enter New Product	{eight} {new item} {another item}	8
Get next bunch of assigned products	{more} {next}	9

Action	Speech Grammar	DTMF Grammar
Debrief	{debrief} {cancel}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt item numbers until the user reaches the end of the available assigned items, or assigned product 7, whichever occurs first.

Serial Number List of Values

Action	Speech Grammar	DTMF Grammar
Serial Number 1	{one}	1
Serial Number 2	{two}	2
+ Serial Number 3	{three}	3
Debrief	{debrief} {cancel}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt item numbers until the user reaches the end of the available serial numbers, or serial number count 8, whichever occurs first. If serial numbers are more than 8, they will not be prompted

Parent Product List of Values

Action	Speech Grammar	DTMF Grammar
Instance of SR, if present	{one} {product of service request}	1
Enter another product using alpha numeric entry	{two} {enter parent product} {new product} {new parent product} {new serial number} {another product} {another parent product}	2
Skip the entry	{three}	3
Debrief	{debrief} {cancel}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

Recovered Product List of Values

Action	Speech Grammar	DTMF Grammar
Enter another product using alpha numeric entry	{one} {enter recovered product} {new product} {new recovered product}	1
Skip the entry	{three} {skip} {skip this step} {none}	3
Debrief	{three} {skip} {skip this step} {none}	*
Main Menu	{main menu}	n/a

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

Return Reason List of Values

Action	Speech Grammar	DTMF Grammar
Return Reason 1	{Return Reason 1}	1
Return Reason 2	{Return Reason 2}	2
+ Return Reason 3	{Return Reason 3}	3
Debrief	{debrief} {cancel}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt return reasons until the user reaches the end of the available items.

Confirm Material Debrief

Action	Speech Grammar	DTMF Grammar
Save debrief line and Go to debrief summary	{yes} {OK} {okay} {correct} {update}	1
Go to debrief summary without saving	{no} {never} {no way} {cancel}	2
Save debrief line and Go to addition of next material line	{add another} {another}	3
Go to Debrief summary	{debrief}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

Grammar for All Alphanumeric Entries

For entries like 'Item Number', 'Serial Number', 'Parent Product Serial Number' and 'Child Product Serial Number'.

Menu

Action	Speech Grammar	DTMF Grammar
Go to alpha digit entry	{alpha digit}, {alpha numeric}	1
Go to digits entry	{digits} {numbers}	2
Go to Debrief summary	{debrief}	*

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

Alpha Digit Entry or Digits Entry

Action	Speech Grammar	DTMF Grammar
Delete previous alphabet or digit entered	{remove} {delete}	n/a
Complete the entry	{complete} {done}	#
To hear what the user has entered so far	{string so far}	n/a
Wild card search	{star}	*
Cancel entry	{cancel}	n/a
Main Menu	{main menu}	n/a
Help	{help}	0

Search Confirmation

Action	Speech Grammar	DTMF Grammar
Yes	{yes} {okay} {ok} {search}	1
No	{no} {cancel}	2
Main Menu	{main menu} {goodbye}	n/a
Debrief Summary	{debrief}	*
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

Search Results

Action	Speech Grammar	DTMF Grammar
Select <data> number 1	{one}	1
Select <data> number 2	{two}	2
+ Select <data> number 3	{three}	3
Debrief Summary	{debrief} {cancel}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

+ This activity continues to prompt until the user reaches the end of the available results, or number 8, whichever occurs first.

Grammar for Voice Travel Debrief

Confirm Travel Debrief

Action	Speech Grammar	DTMF Grammar
Save debrief line and Go to debrief summary	{yes} {OK} {okay} {correct} {update}	1
Go to debrief summary without saving	{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

Grammar for Listen and Delete Debrief Lines

Listen Debrief

Action	Speech Grammar	DTMF Grammar
Delete Respective Debrief Line	{delete} {one}	1
Next	{next}, {four}	4
Previous	{five}, {previous}	5

Action	Speech Grammar	DTMF Grammar
Debrief Summary	{debrief} {cancel}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

Confirm Delete Debrief Line

Action	Speech Grammar	DTMF Grammar
Confirm delete and Go to debrief summary	{yes} {delete} {one}	1
Deny confirmation and Go back to debrief line	{no} {never} {no way} {cancel} {two}	2
Save debrief line and Go to addition of next material line	{add another} {another}	3
Go to Debrief Summary	{debrief}	*
Main Menu	{main menu}	n/a
Repeat	{repeat}	66
Help	{help}	0
Touchtones	{touchtones}	#
Tutorial	{tutorial}	n/a

Confirm Entry of Resolution Code/Expense Debrief/Labor Debrief

This activity enables 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
Touchtones	{touchtones}	#
Help	{help}	0
Tutorial	{tutorial}	n/a
Counter Summary / Task Details	n/a	*

Key Task Flows Using Voice Devices

The following diagrams detail key business flows supported by the Oracle Mobile Field Service Wireless application voice component. The Wireless application supports voice commands and key pad commands.

The flow diagrams guide you through the following scenarios:

- Calling a Customer
- Changing Task Status
- Creating a Labor Debrief
- Capturing a Counter Reading

Within the flow diagrams, each step is comprised of a Command, which leads to an

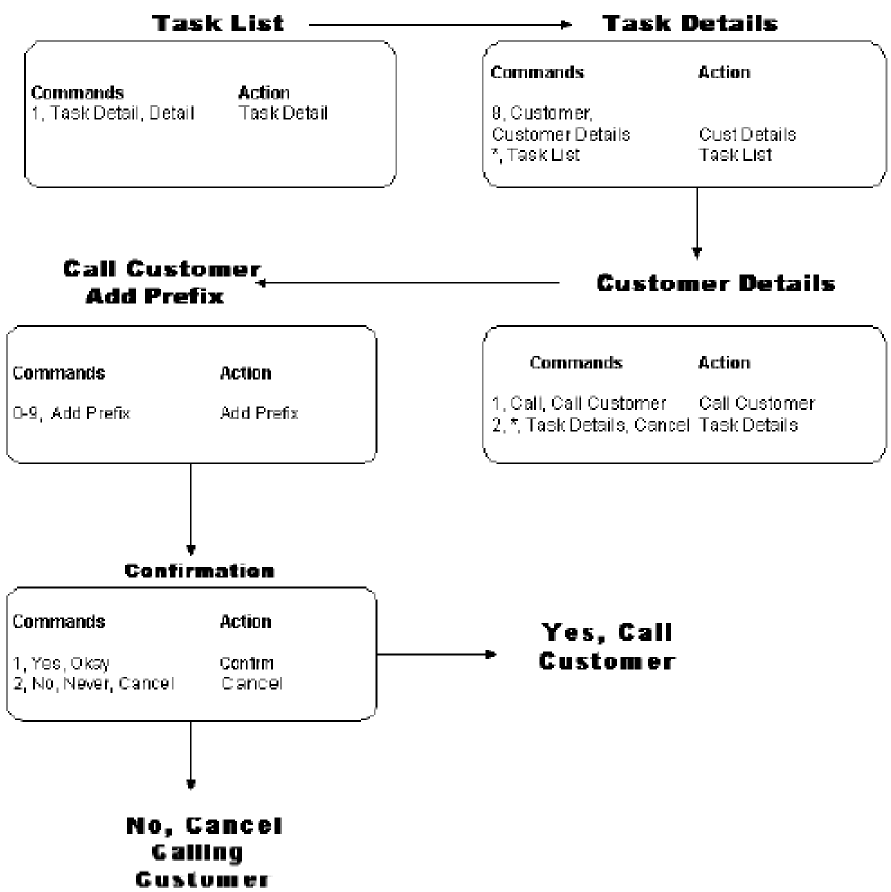
Action by the Mobile Field Service Wireless application.

- **Command:** A command can either consist of a key pad stroke, such as pressing 1 or the * (star) key, or a predefined voice command. In the Commands column of each block in the flow diagrams, both the voice commands and the key pad strokes that initiate the desired action appear.

- **Action:** The resulting action is identical whether you use a key pad command, or a voice command to initiate it.

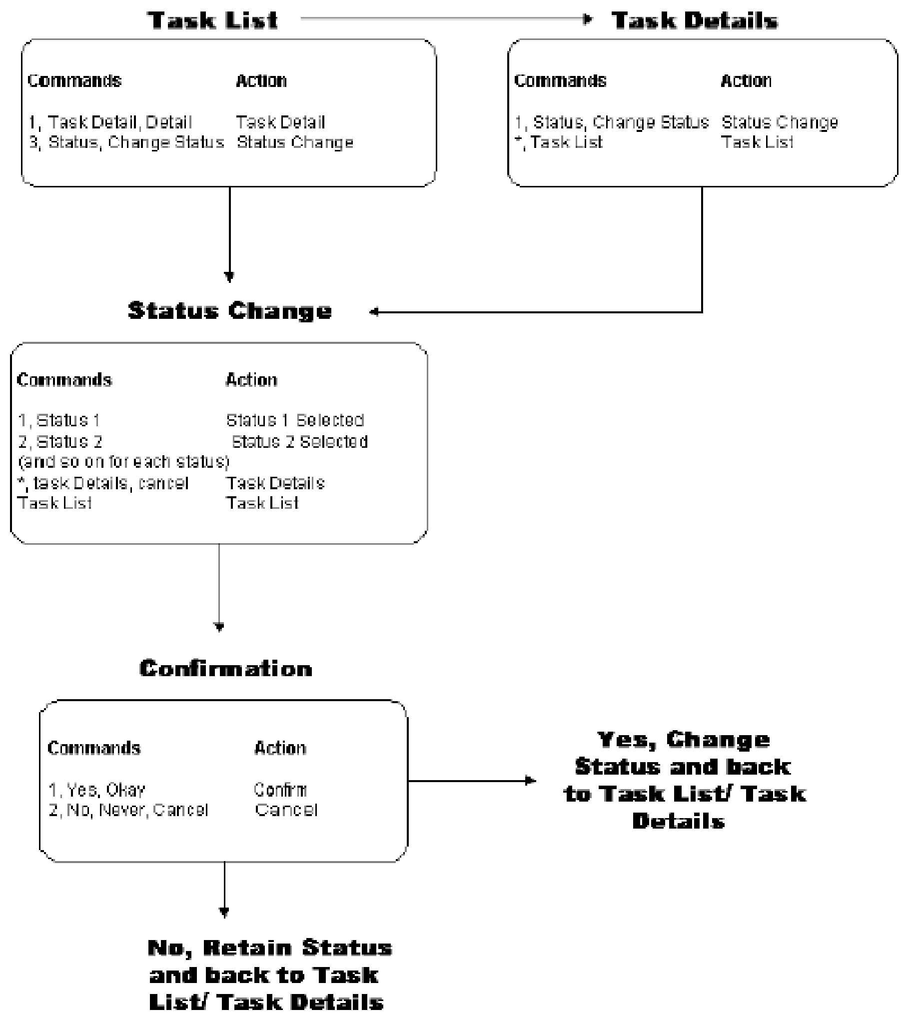
Calling a Customer

Field Service Voice Flow - Call Customer



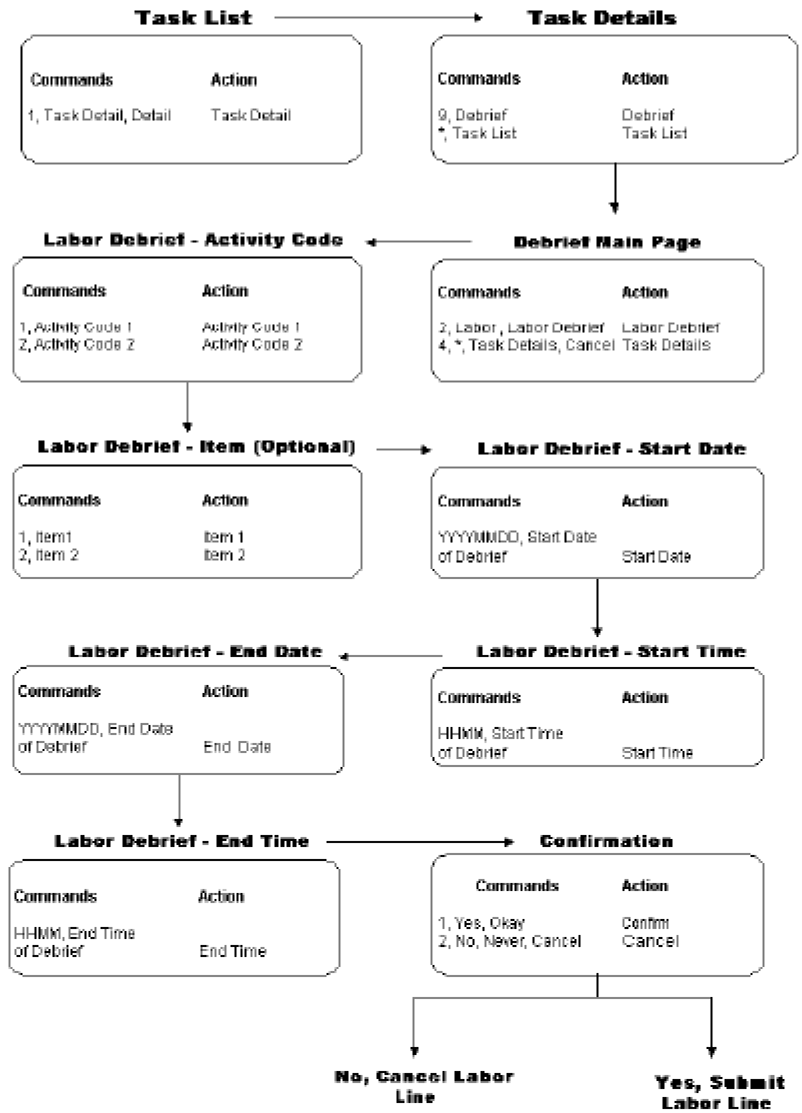
Changing Task Status

Field Service Voice Flow - Change Task Status



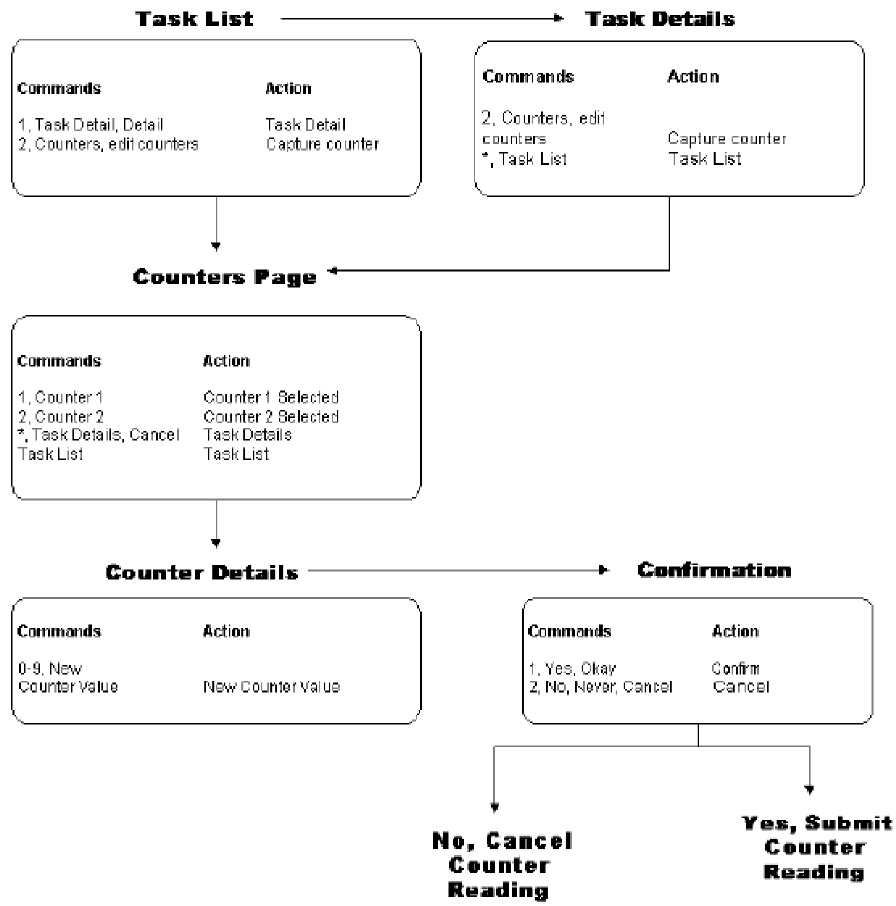
Creating a Labor Debrief

Create Labor Debrief



Capturing a Counter Reading

Capture Counter Reading



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