

**Oracle® Mobile Field Service**

User Guide

Release 12.2

**Part No. E48996-10**

November 2021

Oracle Mobile Field Service User Guide, Release 12.2

Part No. E48996-10

Copyright © 1996, 2021, Oracle and/or its affiliates.

Primary Author: Swati Mohanty

Contributor: Anil Vasudevakurup, Sajesh Radhakrishnan, Jaikant Shukla, Ravi Ranjan

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

---

# Contents

Send Us Your Comments

Preface

## Part 1 Overview Oracle Mobile Field Service

### 1 Understanding Oracle Mobile Field Service

Overview of Oracle Mobile Field Service.....	1-1
Overview of the Oracle Field Service Suite.....	1-11
Oracle Field Service Process Flow.....	1-13

## Part 2 Oracle Mobile Field Service Store and Forward - Multiplatform

### 2 Using Oracle Mobile Field Service Store and Forward – Multiplatform

Overview.....	2-1
Springboard/Home Screen .....	2-2
Viewing Technician's Task List.....	2-8
Performing Debrief.....	2-17
Viewing Service Request Details.....	2-44
Viewing Customer Information.....	2-48
Creating and Viewing Task Notes.....	2-50
Creating and Viewing Attachments.....	2-54
Accessing Map and Driving Directions.....	2-59
Creating Follow Up Task.....	2-60
Creating a New Service Request.....	2-62

Opening Service Requests.....	2-66
Creating a New Task.....	2-69
Creating Personal Task.....	2-70
Generating Field Service Report and Capturing Customer Signature.....	2-72
Managing Trunk Stock.....	2-76
Searching and Ordering Parts.....	2-78
Receiving Parts.....	2-86
Synchronizing with Enterprise Server.....	2-89
Using Descriptive Flexfields.....	2-92
Using the Calendar.....	2-92

### **3 Oracle Mobile Field Service (S&F) Multiplatform - Tablet Edition**

Introduction.....	3-1
Using the Technician Dashboard on the Multiplatform Tablet.....	3-1

### **4 Oracle Mobile Field Service (S&F) Multiplatform - Laptop Edition**

Introduction.....	4-1
Using the Mobile Administrator User Interface.....	4-3
Using the Field Service Technician Dashboard.....	4-12

### **5 Using an E-Mail Interface for Mobile Queries**

E-Mail Mobile Queries.....	5-1
----------------------------	-----

## **Part 3 Oracle Mobile Field Service - Wireless (Online)**

### **6 Using Oracle Mobile Field Service - Wireless**

Introduction.....	6-2
Getting Started.....	6-4
Viewing, Managing, and Updating Your Tasks.....	6-8
Viewing Today's Tasks.....	6-9
Performing a Task Search.....	6-13
Updating an Existing Task.....	6-16
Recording Counter Readings.....	6-18
Adding Debrief Lines to a Task.....	6-19
Generating Field Service Report and Capturing Signature.....	6-30
Creating a Service Request.....	6-33
Creating a Service Request from the Main Menu.....	6-34
Creating a Follow-Up Task.....	6-35
Understanding Scheduling Tasks.....	6-38

Starting Self-Assigned Tasks Immediately.....	6-39
Self-Scheduling Tasks.....	6-42
Using Window to Promise to Schedule Tasks.....	6-43
Using the Intelligent Mode to Schedule Tasks.....	6-45
Creating a Personal task.....	6-46
Viewing Install Base Product Configuration.....	6-47
Viewing and Scheduling Unassigned/Assigned Tasks (Decentralized Scheduling).....	6-49
Making Mobile Queries.....	6-51
Performing a Parts Search.....	6-52
Using Radius Search Capabilities.....	6-52
Creating a Parts Requirement.....	6-56
Ordering Parts.....	6-57
Creating an Internal Transfer.....	6-58
Creating a Move Order.....	6-59
Creating an Internal Order.....	6-60
Receiving Parts.....	6-61
Returning Parts.....	6-62
Transferring Parts.....	6-67
Viewing Project Details.....	6-67
Accessing the Knowledge Base.....	6-69
Getting Driving Directions.....	6-70
Viewing and Saving an Offline Schedule.....	6-71
Managing Receipt of Shipments.....	6-71
Changing Passwords.....	6-72
Selecting Preferences.....	6-74
Viewing Technician Calendar.....	6-77

## **7 Using Oracle Mobile Field Service Wireless (Online) – Field Service Administrator Dashboard**

Overview.....	7-1
---------------	-----

## **Part 4 Oracle Mobile Field Service Notifications**

### **8 Using Mobile Field Service Notifications**

Using Notifications.....	8-1
--------------------------	-----

### **A Scheduling and Completing Tasks**

Introduction.....	A-1
Conform to the Schedule.....	A-1

Order of Task Completion.....	A-2
General Operating Rules.....	A-2

## Index

---

# Send Us Your Comments

## **Oracle Mobile Field Service User Guide, Release 12.2**

### **Part No. E48996-10**

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and [www.oracle.com](http://www.oracle.com). It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: [appsdoc\\_us@oracle.com](mailto:appsdoc_us@oracle.com)

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at [www.oracle.com](http://www.oracle.com).





---

# Preface

## Intended Audience

Welcome to Release 12.2 of the *Oracle Mobile Field Service User Guide*.

This guide is intended for technicians and administrators of Oracle Mobile Field Service.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

## Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Structure

- 1 Understanding Oracle Mobile Field Service**
- 2 Using Oracle Mobile Field Service Store and Forward – Multiplatform**
- 3 Oracle Mobile Field Service (S&F) Multiplatform - Tablet Edition**
- 4 Oracle Mobile Field Service (S&F) Multiplatform - Laptop Edition**
- 5 Using an E-Mail Interface for Mobile Queries**
- 6 Using Oracle Mobile Field Service - Wireless**
- 7 Using Oracle Mobile Field Service Wireless (Online) – Field Service Administrator Dashboard**

## Related Information Sources

### 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 Oracle 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.

### Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently
- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual** - The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

### Guides Related to All Products

#### Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on

setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

## **Guides Related to This Product**

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

This guide describes how to create and manage mobile users, implement the wireless option, and set up the interapplication bar to conveniently navigate between applications to perform diagnostic testing. This enables mobile users to periodically synchronize their mobile computer devices with the enterprise system in order to download new Oracle Mobile Field Service data and upload changes that they have made in their applications. For example, the technician can access and update the material debrief at a customer site for materials installed and returned in the task. When out of wireless coverage, technicians can continue to perform tasks using the voice interface or phone.

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

This guide enables you to install and implement Oracle Spares Management, Oracle Advanced Scheduler, Oracle Inventory, Oracle Order Management, Oracle Service Contracts, Oracle Depot Repair, and Oracle Complex Maintenance, Repair and Overhaul for Preventive Maintenance. Integration with these applications is necessary to automate field service activities. In addition, you define codes to justify material, labor, and expense, define billing types and associate these with service activity codes and inventory items, and define skills and skill levels of field technicians. You can also define time-based and usage-based preventive maintenance programs, and forecast usage rates.

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

Oracle Field Service enables the automation of field service operations such as scheduling and dispatching tasks to field technicians, ordering parts, and tracking task completion. You can use its debrief capabilities to access notes and interaction history in support of call closure, and report task execution time, parts and expenses.

## **Installation and System Administration**

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

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

### **Oracle E-Business Suite Concepts**

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the

Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

### **Oracle E-Business Suite CRM System Administrator's Guide**

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

### **Oracle E-Business Suite Developer's Guide**

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

### **Oracle E-Business Suite Installation Guide: Using Rapid Install**

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

### **Oracle E-Business Suite Maintenance Guide**

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

### **Oracle E-Business Suite Security Guide**

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

### **Oracle E-Business Suite Setup Guide**

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

## **Oracle E-Business Suite User Interface Standards for Forms-Based Products**

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

## **Other Implementation Documentation**

### **Oracle E-Business Suite Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

## **Training and Support**

### **Training**

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

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

### **Support**

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep your product working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

## **Do Not Use Database Tools to Modify Oracle E-Business Suite Data**

Oracle **STRONGLY RECOMMENDS** that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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





---

# Understanding Oracle Mobile Field Service

This chapter covers the following topics:

- Overview of Oracle Mobile Field Service
- Overview of the Oracle Field Service Suite
- Oracle Field Service Process Flow

## Overview of Oracle Mobile Field Service

Oracle Mobile Field Service is part of the Oracle Field Service Suite of products. Oracle Mobile Field Service contains the following mobile applications:

- Oracle Mobile Field Service Store and Forward - Multiplatform
- Oracle Mobile Field Service - Wireless

In addition, in the Oracle Field Service application there is the Field Service Technician Portal that can also be considered a mobile application. For information on the Field Service Technician Portal, see the *Oracle Field Service User Guide*.

### Oracle Mobile Field Service Store and Forward - Multiplatform

The Oracle Mobile Field Service Store and Forward - Multiplatform application is a device agnostic disconnected (off line) application that can be run on multiple platforms such as IOS, Android, and Windows and various form factors such as smartphones, tablets and laptops. This application requires a synchronization process with the enterprise system to receive and send information related to field service technicians. The service request, and all associated information, is stored locally on the mobile application device. 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 the Field Service Dispatch Center in the Oracle Field Service application.

With the power of the Oracle Mobile Field Service Store and Forward application, 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 needed for a customer product, the field service technician can access the robust spare parts management functionality that is included in the mobile applications. 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.

### Oracle Mobile Field Service - Wireless

The Oracle Mobile Field Service - Wireless application offers a complete, automated, and streamlined field service solution 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.

The Mobile Field Service - Wireless application facilitate the communication between the office, dispatchers, and the mobile workforce. Using Mobile Field Service - Wireless applications, 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 them 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 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.

**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.

## Oracle Mobile Field Service Applications Compared

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

In the table below the abbreviations are:

- FSTP - Field Service Technician Portal
- FSAP - Field Service Administrator Portal
- MFS (S&F) - Mobile Field Service Store and Forward
- MFS - Mobile Field Service
- WAP - Wireless Access Protocol
- NLS - National Language Support
- KM - Knowledge Management

### *Feature List by Mobile Field Service Module*

Feature	FSTP and FSAP	MFS (S&F) Multiplatform	MFS Wireless PPC (Medium)	MFS Wireless WAP (small screen)
Task list dashboard with multiple views	Yes	Yes	N/A	N/A
Search task, SR	Yes	Yes	Yes	Yes
Update task, SR	Yes	Yes	Yes	Yes
Create personal task	No	Yes	No	No
Create service request	Yes	Yes	Yes	No
View contracts	Yes	Yes	Yes	No
View customer and contact details	Yes	Yes	Yes	Yes
Update counter reading	Yes	Yes	Yes	No

<b>Feature</b>	<b>FSTP and FSAP</b>	<b>MFS (S&amp;F) Multiplatform</b>	<b>MFS Wireless PPC (Medium)</b>	<b>MFS Wireless WAP (small screen)</b>
Process debrief	Yes	Yes	Yes	Limited (Expense and Labor)
Search parts	No	Yes	Yes	Yes
Transfer parts	No	Yes	Yes	Yes
Order parts	Yes	Yes	Yes	No
Receive parts	Yes	Yes	Yes	No
View/Create notes	Yes	Yes	Yes	No
Upload/download attachment	Yes	Yes	Yes	No
View service history	Yes	Yes	Yes	Yes
View install base configuration	Yes	No	Yes	No
Flex field support	Yes	Yes	Yes	No
Capture Signature	Yes	Yes	Yes	No
SDK Customization Support	No	Yes	No	No
Messaging support	No	Yes	No	No
KM Integration	Yes	No	Yes	No
Access Maps and Driving Directions	Yes	Yes	Yes	No
Return Parts	Yes	Yes	Yes	No

Feature	FSTP and FSAP	MFS (S&F) Multiplatform	MFS Wireless PPC (Medium)	MFS Wireless WAP (small screen)
Process Unused and Defective on Arrival Parts during debrief	Yes	Yes	Yes	No
Parts radius search	Yes	No	Yes	No
Internal asset support	Yes	Yes	Yes	Yes
Create follow up task	Yes	Yes	Yes	No
Travel debrief	Yes	Yes	Yes	No
Manually post debrief	Yes	No	Yes	No
Pro forma Invoice	Yes	No	No	No
Self Assign Tasks	No	Yes	Yes	No
Self schedule tasks	Yes	No	Yes	No
Schedule task using intelligent mode	Yes	No	Yes	No
Schedule tasking using WTP mode	Yes	No	Yes	No
NLS language Support	Yes	Yes	Yes	Yes
File Sync Support	No	No	No	No
Debrief error correction	Yes	No	Yes	No
Debrief E-record Approval	Yes	No	No	No
Automatic Synchronization	N/A	Yes	N/A	N/A
Mobile Queries	No	No	Yes	No

Feature	FSTP and FSAP	MFS (S&F) Multiplatform	MFS Wireless PPC (Medium)	MFS Wireless WAP (small screen)
Server side Undo feature	N/A	No	N/A	N/A
Personalization support	Yes	Yes(limited to show/hide)	Limited (2nd level functional security)	No
Default labor and travel debrief based on task status updates	Yes	Yes	No	No
Restrict Service Request creation to site where technician is working	Yes	No	No	No
Enforce Cross-Task validation to prevent tasks for different customer site locations in same statuses in technician's trip	Yes	No	No	No
Filter tasks in dashboard based on Group/Territory	Limited (FSAP)	No	No	No

## Key Features

### Mobile Field Service Store & Forward - Multiplatform

The following are key features of the Oracle Mobile Field Service Store and Forward applications:

- Service Requests and Tasks
- Debrief Reporting
- Spares Management

### Service Requests and Tasks:

The following are functions that you can perform with the Oracle Mobile Field Service Store and Forward applications:

- View and update a service request and task.  
Upon receipt into the mobile application, a task has a status of "Assigned". However, as the task progresses, the field service technician can change this status and task type.
- Work on a task.  
For a complete description on how field service technicians may complete a task, see "Field Service Process Flow".
- Create a service request and task.  
The dispatch center issues the service request and task to the field service technician. On some occasions, a problem may be detected at the customer site that was not recognized by the dispatch center. In this case, the field service technician can create a service request and task.  
  
Tasks that technicians create using the mobile application are automatically assigned to them, provided that the task type is associated with the "dispatch rule" and the task has a status of "Assigned." Technicians can immediately work on the new task assignment, including entering debriefs.  
  
If the install base item for a service request is not correct, technicians are able to change this install base item. Furthermore, they can create a service request for an install base item at the customer location.
- View service history.  
The Oracle Mobile Field Service Store and Forward applications display service histories for closed or completed service requests, detailing any install base item and customer information.  
  
Only closed service requests are downloaded with a service history. Service history information is read-only. If the service request is based on the install base product, then the service history for the install base product is available to view. Otherwise, for that customer or customer location, a history will be displayed. The following information is replicated for a service history record:
  - Closed or completed service request.
  - Primary contact of this closed service request.
  - Product or item of the service request, excluding parent and child records
  - Closed tasks of this service request.
  - Closed task assignments of these tasks (role = assignee)
  - Resources of these task assignments

- Debrief lines belonging to these task assignments
- View customer and product information  
The Oracle Mobile Field Service Store and Forward applications provide technicians with ample information on the customer, such as address and notes. The applications also offers a detailed description of the customer product.
- Record counter readings  
For a customer product, the Oracle Mobile Field Service Store and Forward applications enable technicians to set and reset counter readings for this product if this is desirable. Counter readings are helpful in scheduling maintenance.
- Time zone support  
The Oracle Mobile Field Service Store and Forward applications enable operations across multiple time zones. All the times displayed on the client are local times. All times are stored in the database in server time. Appropriate conversions are made whenever required for storage or display. The SERVER\_TIMEZONE\_ID and CLIENT\_TIMEZONE\_ID profiles enable the server and client time zones to be set. If the appropriate profile options for either of these profiles are not defined, then no time zone conversion will occur and all times will be shown in the server time.

### Debrief Reporting

In Oracle Mobile Field Service Store and Forward applications, a field service technician can report the labor time, materials, and expenses incurred during the completion of a task.

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

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

The following system items are replicated to the mobile devices:

- Items used in a service request assigned to or created by the mobile user.
- Item instance items used in a service request assigned to or created by the mobile user.
- Signature capture



- Items used in item orders
  - Items present in a good subinventory assigned to the mobile user
  - Items present in the inventory organization specified by the Service: Inventory Validation Organization profile.
- Signature capture
 

The Oracle Mobile Field Service Store and Forward applications enable 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.

### **Spares Management**

Oracle Mobile Field Service Store and Forward applications enable technicians to manage the parts inventory that they can use in the repair or replacement of parts for a service request. This is done through the following functions:

- Order parts
 

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

After a part is ordered, a field service technician can access the status of the ordered part.
- Transfer parts
 

If a part is needed but not available from an easily accessible inventory, the desired part can be transferred to a more convenient inventory. This process may prove to be more efficient than ordering the part.
- Category set limiting
 

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

### **Mobile Field Service - Wireless**

The following is a list of key features in Oracle Mobile Field Service Wireless:

- Ability to capture debrief information, use return routing to process unused and defective on arrival parts during debrief, and manually post debrief lines.

- Ability to search for parts in a warehouse, technician's subinventory, and co-workers subinventory using radial search.
- Ability to create parts orders.
- Ability to find driving directions between task locations.
- Ability to change password.
- 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.

- Intelligent: With this option technicians can perform other options including Windows to Promise and schedule a task for other resources. It is similar to the Intelligent mode of the Dispatch Center Scheduler.
- 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.

## Key Benefits

### Mobile Field Service Store and Forward - Multiplatform

The Oracle Mobile Field Service Store and Forward - Multiplatform application offers the following benefits:

- A truly device agnostic solution that can be installed on smartphones, tablets and laptops

- One MFS License for all devices
- Leverages mobile platform: gestures, camera, email, phone, text, maps
- Simple interface that displays what the user needs to complete the job while on the go

#### **Mobile Field Service - Wireless**

Oracle Mobile Field Service Wireless 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.
- 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.

## **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 window is delivered with the Oracle Field Service application. The Service Request window is used by the call center to enter service requests for problems reported by the customer.
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.
Oracle 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.
Oracle 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. The Mobile Application Foundation is used by the Mobile Field Service Store and Forward applications.

Suite Application	Description
<b>Oracle Mobile Field Service Store and Forward - Multiplatform</b>	This application is a disconnected application typically installed on a field service technicians smartphone, tablet or laptop. The field service technician can receive his daily schedule and report on progress, material, expense, and labor.
<b>Oracle Mobile Field Service - Wireless</b>	This application is a connected application for any wireless device. This application offers a complete, automated, and streamlined field service solution to field service technicians by providing real-time wireless access to the enterprise application. Using any wireless device, the field service technicians can remotely access the latest, most accurate and critical information to perform their job.

## Oracle Field Service Process Flow

This section describes the typical field service process flow (Oracle Field Service) and where the mobile applications can be utilized in this flow.

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. When the application receives the request, the customer, product, and contract are checked in the validation step.

Steps	Description
2. Service request screening and qualification.	<p>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.</p>
3. Service request planning and dispatch.	<p>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.</p>
4. Service request delivery and reporting.	<p>After the field service technician receives an assigned task or schedule, they can begin service at the customer site. They report on progress, materials used and recovered, expenses, and labor time. Additionally, they can record counter readings and describe how the problem was resolved. It might be necessary to create new tasks or service requests if the field service technician cannot help the customer immediately. They can recover the product or product part for repair. All the reported information is used for billing the customer. Reporting on materials-used also results in automatic replenishment of the inventory in the service vehicle.</p>

---

Steps	Description
5. Service request monitoring.	Unforeseeable events can occur that impact the progress of a task. In this case, escalations can be raised to indicate this situation.
6. Service request completion and billing.	When the field service technician completes a task, he sets the task status as COMPLETED 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.

**Step 4 Service Request Delivery and Reporting** can be performed using one of the Oracle Mobile Field Service applications. In the Mobile Field Service applications, the field service technician receives the schedule on their mobile computer device. They can record counter readings and report on material used, labor time, and expenses incurred.





# Part 2

---

## Oracle Mobile Field Service Store and Forward - Multiplatform



---

# Using Oracle Mobile Field Service Store and Forward – Multiplatform

## Overview

Oracle Mobile Field Service (Store and Forward) application (MFS), built on Mobile Application Framework (MAF), mobilizes Enterprise Field Service data on various mobile platforms using secure framework. Its offline capability allows technicians to update tasks, capture materials, time, and expenses, access inventory levels, request parts in offline mode and synchronize when they are online. The application runs in hybrid mode and leverages native device features (Camera, Voice) and touch screen capabilities thereby providing intuitive and user friendly interfaces. The application supports iOS and Android based smart phones and tablets and Windows based laptops.

Oracle Mobile Field Service (Store and Forward) application enables you to perform the following key tasks:

- View customer
- Create service request and task
- Create personal task
- View your task list using various task views
- Create or view task notes
- Create or view attachments
- Get driving directions
- Debrief task (material, labor, travel, and expense)

- Field service report and get signature
- Search and order parts
- Receive parts
- Messages
- View trunk
- Automatic synchronization

For information on Installation, Setup, and Implementation, see *Oracle Mobile Field Service Implementation Guide*.

The multi-platform Store & Forward Application, built once, can then be deployed on multiple devices and platforms. The application and functionality offered is the same across devices, whether it is on a smartphone, tablet, or laptop.

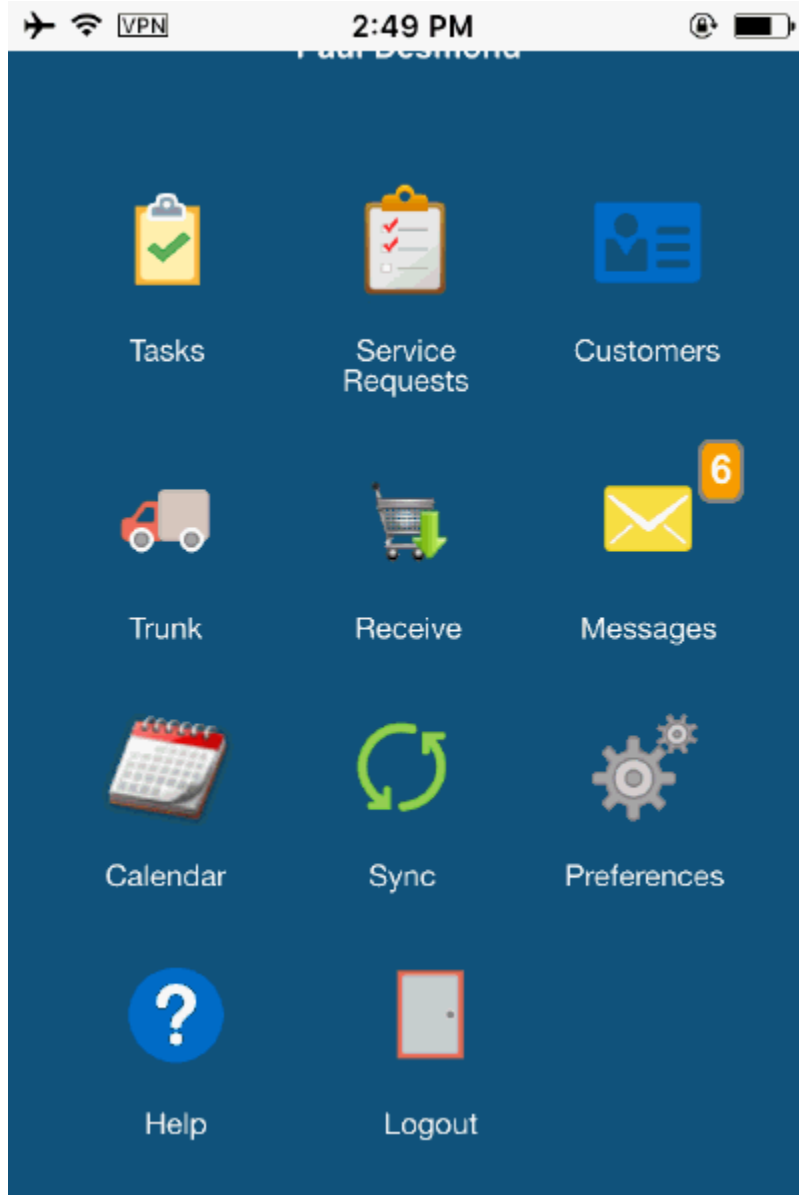
Tablets have more screen space and hence more robust screen rendering in order to leverage the bigger form factor.

The laptop edition of the multiplatform application provides flexibility such that it can be used by a single user doing their break fix job independently or by multiple users who belong to the same group and share the same device to access their data.

This section describes the basic field service features offered by the multiplatform application. The navigation and user interface on the tablets is described in the section Oracle Mobile Field Service (S&F) Multiplatform - Tablet Edition, page 3-1. Setting up a multi-user environment and leveraging some additional capabilities such as the Administrator Dashboard are further described in the section Oracle Mobile Field Service (S&F) Multiplatform - Laptop Edition, page 4-1.

## Springboard/Home Screen

Oracle Mobile Field Service Store and Forward – Multiple Platforms application provides various global functions in its Home screen.



- User Name: Displays the name and the picture of the logged user
- Task: Allows you to view list of tasks assigned to you
- Service Requests: Allows you to view list of service request assigned to you
- Customer: Allows you to view list of customers
- Trunk: Allows you to view your trunk stock
- Receive: Allows you to view all parts orders that are ready to receive to your

### Subinventory

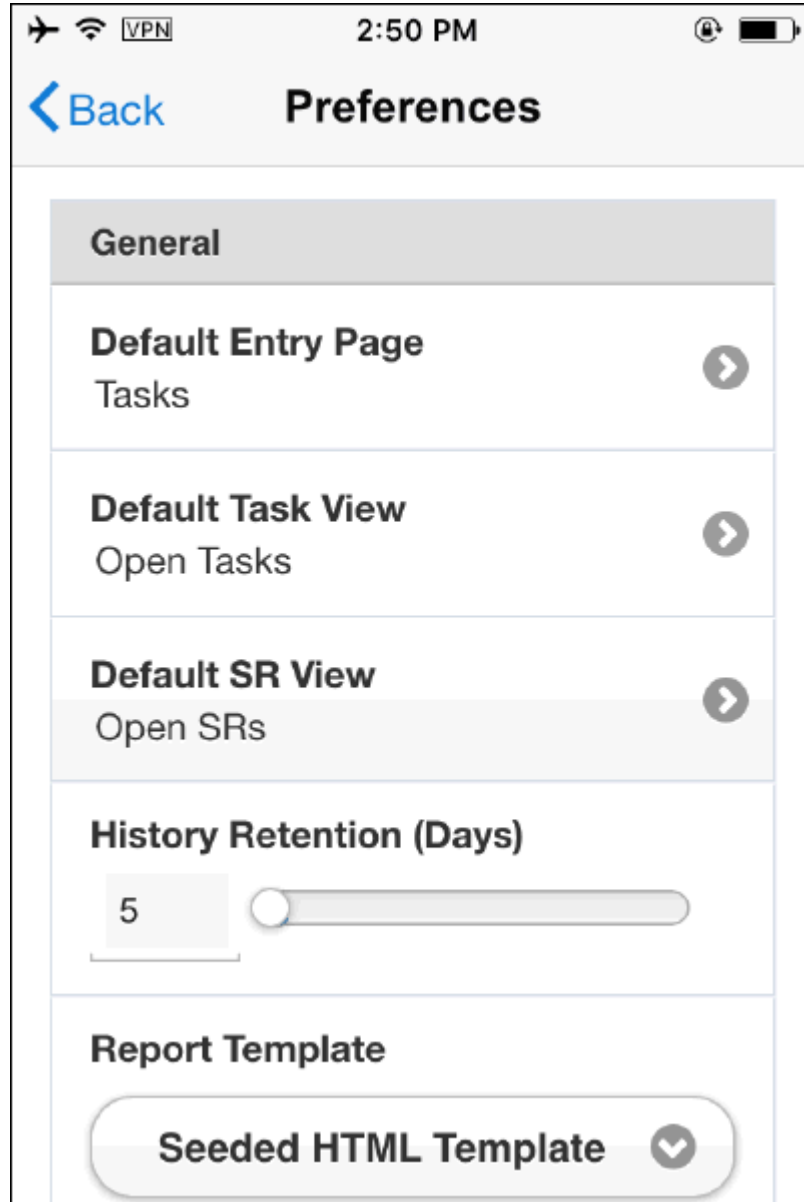
- Messages: Allows you to view all deferred error messages
- Sync: Allows you to synchronizes Mobile Field Service client with the enterprise system
- Preferences: Allows you to view the current settings and allows to change those preferred settings
- Help: Allows you to view the client version. Also it allows you to enable to Diagnostic log files
- Logout

### **Setting Preferences:**

You may use preferences screen to set either the Task List screen or the Home screen as your default landing page. You may also set views as their default task view. For example, Today's Tasks view displays all tasks that are scheduled for that day.

To set preferences:

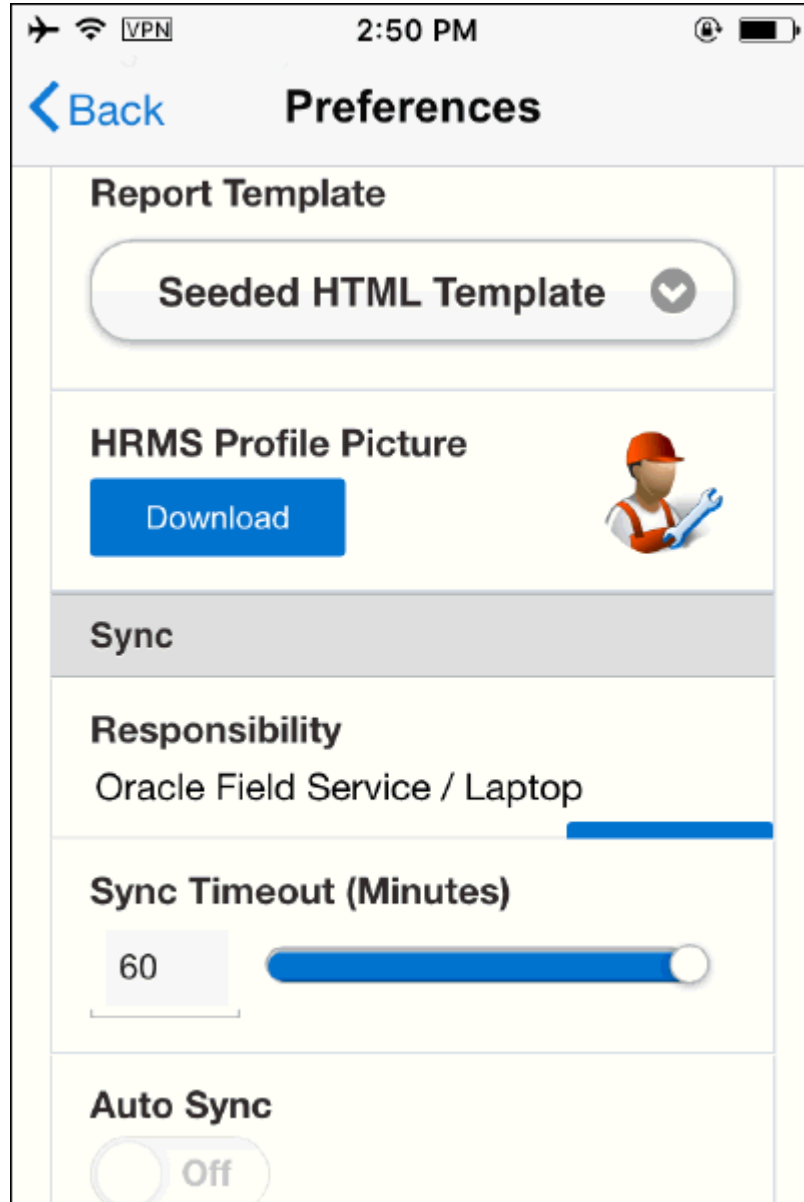
1. Navigate to the Home page and tap the Preferences icon.



2. Default Entry Page allows you to set the default landing page. Options are: Home Page, Message, Service Requests, and Tasks.
3. Default task view determines which task view should be used when you navigate to Task list screen every time. You may override this by selecting the task views from Filter present in task list screen. The choices are :
  - Today's Tasks
  - Open Tasks

- Today's Open Tasks
  - Tasks For Date
4. Default SR view determines which SR list view should be used when you navigate to SR list screen every time. You may override this by selecting the SR view when you are inside the SR list screen. The choices are :
    - Today's SRs
    - Open SRs
    - Today's Open SRs
    - SRs For Date
  5. History Retention (Days): This setting determines how long the task will be retained in the client after closing the task.
  6. Report Template. This setting determines what format to be used while generating reports.
    - Seeded HTML Template
    - Seeded PDF Template





7. **HRMS Profile Picture:** This option allows you to attach your profile picture. During the initial install, the profile picture will be downloaded from HRMS (if you attach picture while setting up the resource). Later you may change the picture using your photo album from your device.
8. **Sync Timeout (Minutes):** This settings determines how long to try sync before the timeout.
9. **Auto Sync:** This setting shows whether Automatic Synchronization is enabled or not. Refer Synchronization section to learn more about the details.

**Getting Help:**

Help screen allows you to view the activity logs, Diagnostics, and view the installed version of the application.





1. Navigate to Home, tap Help.
2. Tap any of the following:
  - Activity Log – to view the log of all system activities.
  - About – to view product details such as release, End user License Agreement, and Oracle Privacy policy.
  - Diagnostics – to enable or disable diagnostics which allows you to troubleshoot the application.


**Viewing Messages:**




The Message screen displays details of deferred transactions that help technicians to troubleshoot issues encountered during synchronization. You can also view, compose messages, reply, forward, and delete messages from the Inbox.



## Viewing Technician's Task List

A task list provides a quick summary of the tasks assigned to the field service technicians and can be accessed via the Tasks icon on the Home screen of the multiplatform application. The Task list gets refreshed and display new tasks (if any) when you synchronize the device with the enterprise server. By default, the Task screen displays the list of Open tasks assigned to the client. See screenshots below.




2:20 PM



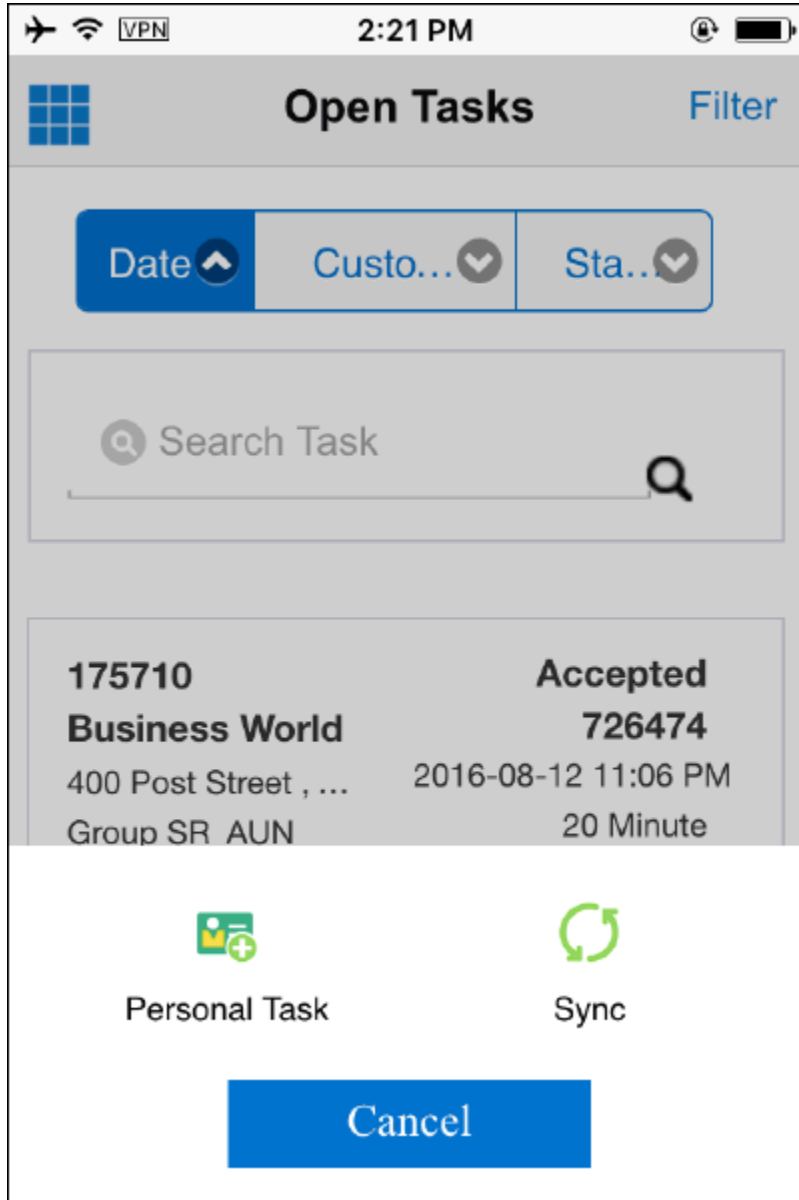

Open Tasks
Filter

Date 
Custo... 
Sta... 

 Search Task 

<b>175710</b> <b>Business World</b> 400 Post Street , ... Group SR_AUN	<b>Accepted</b> <b>726474</b> 2016-08-12 11:06 PM 20 Minute
<b>175728</b> <b>Business World</b> 400 Post Street , ... ...	<b>Task_Assign</b> <b>726674</b> 2016-08-12 10:51 PM 2 Hour

Actions 



A task view has the following components: Home, Filter, Sort fields, Task list, and Actions. Note: In Android devices, Actions menu can be accessed by device menu.

- Home icon that launches the Home screen or springboard which provides the technician with options to view customers, create new service requests, view their trunk stock, receive parts assigned to them, view messages, set default preferences, check the current client version, enable database logging using debug options, etc.
- Task Filter that allows you to either view tasks that are assigned for that day or all tasks irrespective of the scheduled date. Additionally, it allows you to search all open tasks using a date range. Note: You may set the default task view using

Preferences screen.

- The sort fields allow you to sort the task display based on Scheduled Date, Customer, or Status. The sort icon toggles between ascending or descending order each time when you tap the icon.
- Task list section is a multi row section which displays tasks. Each task record consists of following fields: Task Number, Status, Service Request, Customer Name, Customer Address, Task Scheduled Date, Task Subject, and Planned Effort. You can view additional tasks (if any) by scrolling down by simply swiping up or down. By default 20 tasks are shown at a time. You can open the task by tapping any task record.
- The Action button launches the Actions menu. The actions menu is present in various screens throughout the app and provides context sensitive options for the user to select. In Task list, this action menu allows you to initiate manual synchronization or create personal task.






### **Viewing and Opening Tasks:**

You can tap any task record to open the task details screen to view more details. This screen provides complete details about the job that needs to be performed. Complete the following steps from the Task list screen to access a task:

1. Navigate to the Task list screen.
2. Tap the selected task. The Task screen launches with the following information:
  - Status - displays the current task assignment status of the task. Technicians will be able to change the status using task assignment status LOV. Task assignment status LOV will display only the next status based on the status transition rule. This status transition plays a role in defaulting both travel and labor lines automatically.
  - Subject - Editable field that displays the brief description of the task.
  - Priority - Displays the task priority and you may change the value using drop down if needed.
  - Type - Displays the task type which generally represents field service tasks.
  - Scheduled Start Time- Displays schedule Start Date/Time.
  - Effort - Read-only field that displays the effort for the task.
  - Address - Displays the location of the task. Tap the map icon located in the address region to launch Google map which is the default map integrated to MFS. It gives you step by step directions and voice assisted driving directions.

- SR region - Displays service request number and Customer Name associated with the task. You can view more details about the service request by tapping the service request number hyperlink.
- Parts Search - Provides the ability to find parts availability across various warehouses and trunk stocks of other technicians, and all sub-inventories assigned to you. You may create order from the search results.
- Receive Parts - provides the ability to receive all shipped orders into your trunk.
- Note - Allows you to view various action plans attached to your task. Generally, call center agents create such notes during task creation. Additionally, you can create your own note and upload to the server.
- Attachment - Provides the ability to view/download/upload various types of attachments. Refer attachment section for more details.
- Field service technicians use the next few fields to capture Travel and Labor related information, and report on material (Material Install and Material Return), and Expense for their individual task assignments. Data gathered is used for generating customer invoices, updating the installed base, and maintaining the service vehicle trunk stock.
- Report - Allows you to generate field service report, get customer signature, and send via various mode such as email and Print.
- Debrief Header DFF - Descriptive flexfield to capture any additional debrief information.

Actions menu present in the Task screen provides context sensitive actions for the technician. See the following screenshots.





2:21 PM



< Back
**Task175710**
Save

---

Status  
 Accepted ➤

---

Subject  
 Group SR\_AUN 

---

Priority  
 High ➤


---

Type  
 Field Service Repair ➤


---

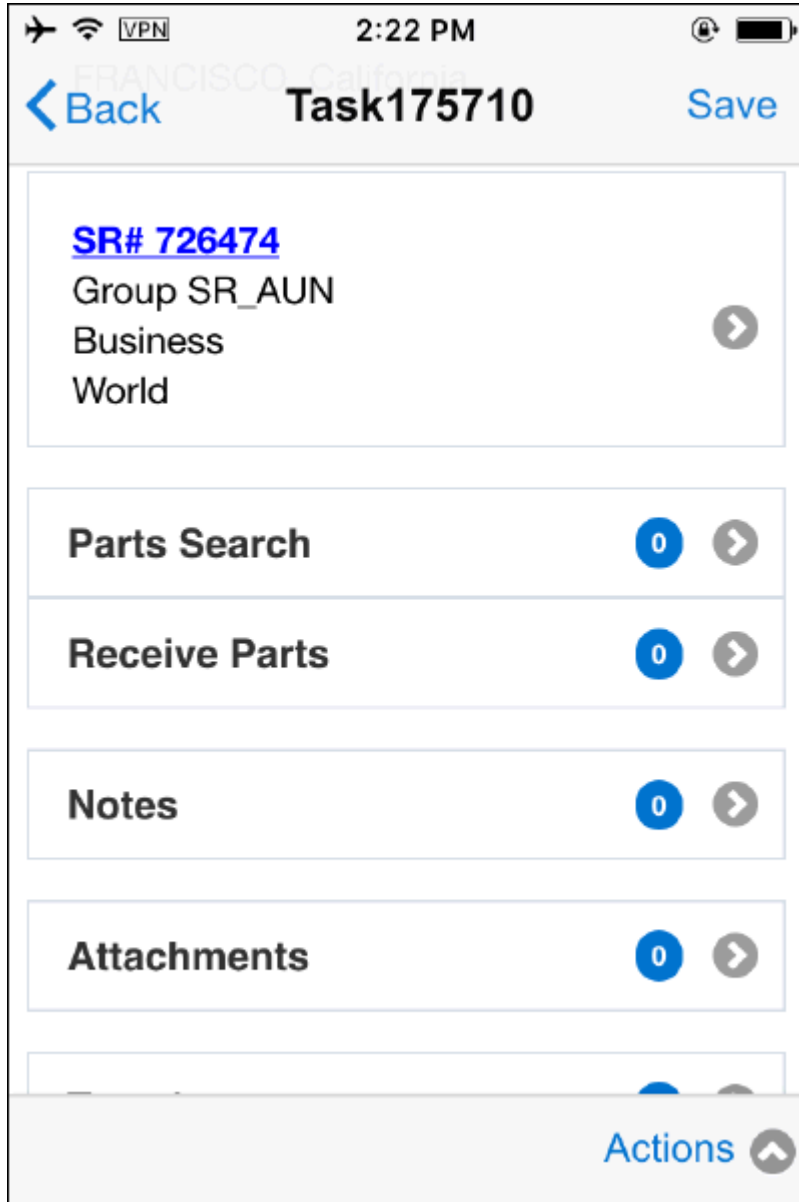
Scheduled Start Time  
 2016-08-12 11:06 PM
 Effort  
20 Minute

---

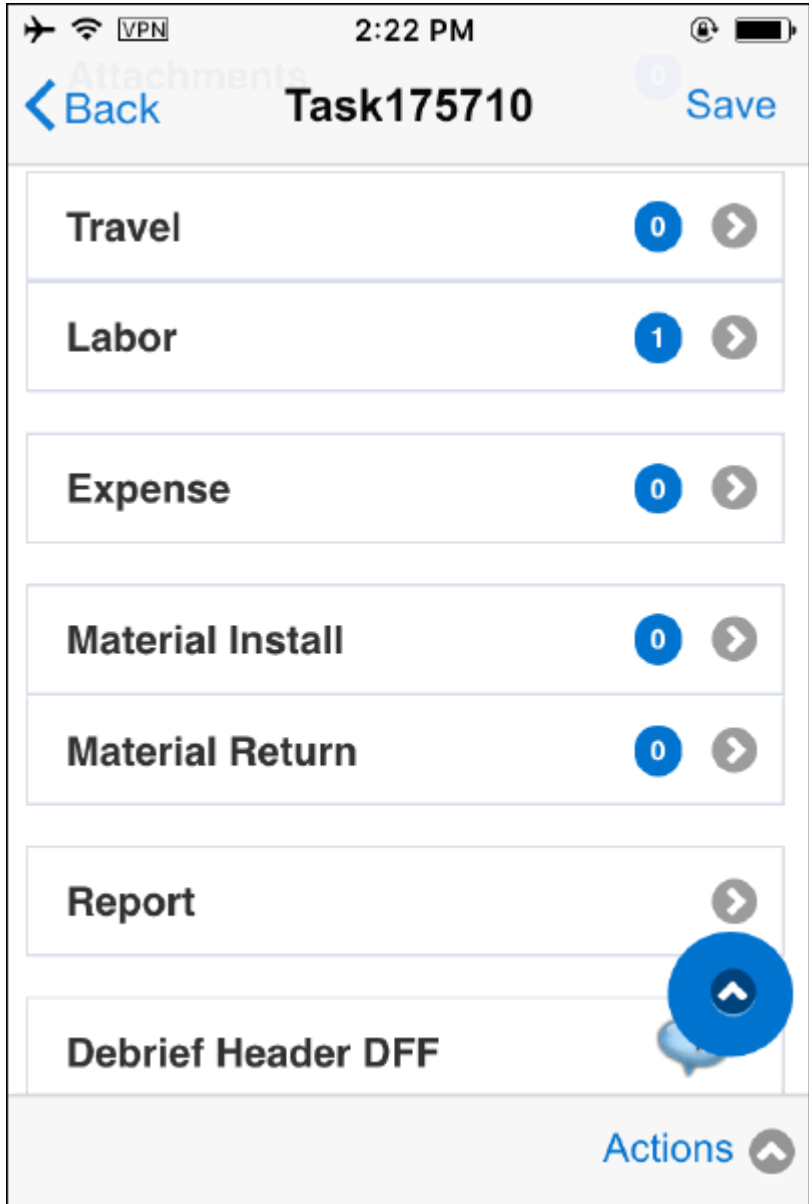
Address 

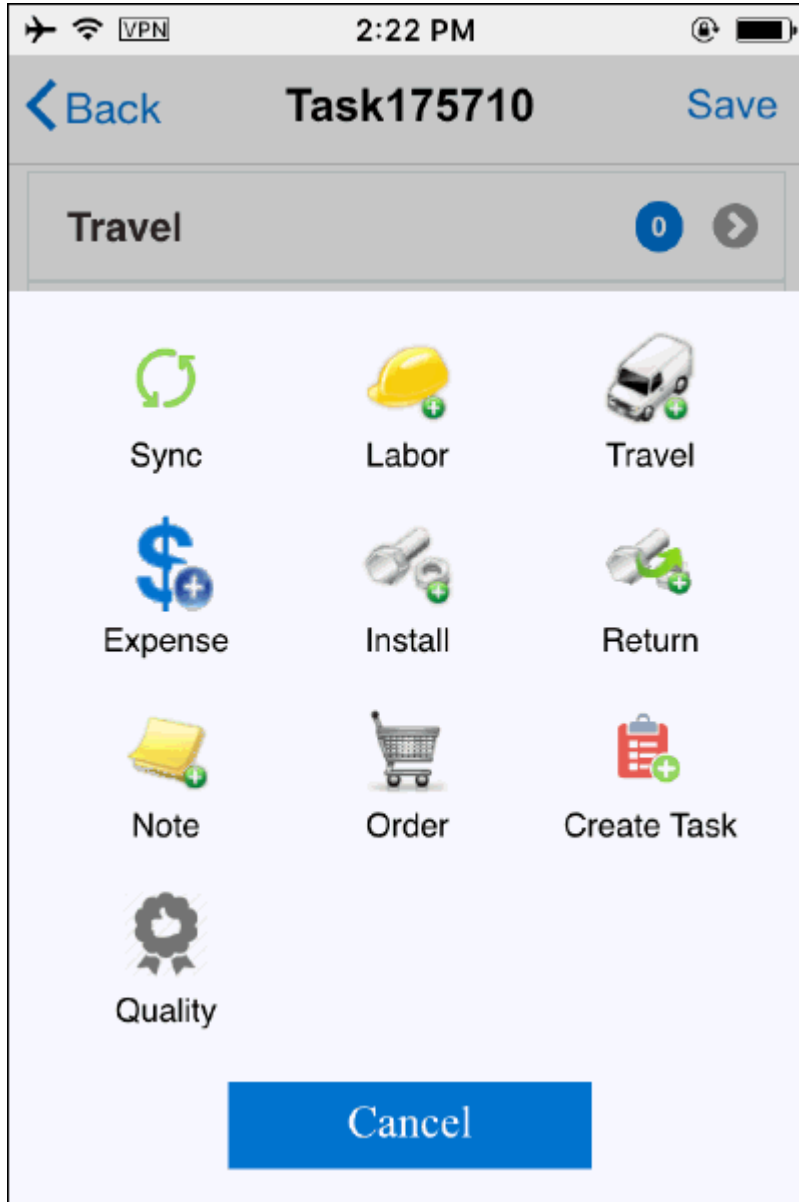
---

Actions 









Status: **Task175710**  
 Priority: High  
 Type: Field Service Repair  
 Scheduled Start Time: 2016-08-12 11:06 PM  
 Effort: 20 Minute  
 Address: 400 Post Street, SAN FRANCISCO, California  
[SR# 726474](#)  
 Group SR\_AUN  
 Business  
 World  
 Actions

## Performing Debrief

As a technician, you have the ability to debrief the task after you perform the job at customer site. MFS application allows you to add Travel, Labor, Material (Install and Return), and Expense lines to the task.

### Adding Travel Debrief:

You create a Travel line to report how much travel time was involved during the completion of a task. MFS application enables you to add travel lines during the case

progression.

Complete the following steps to add travel debrief lines to a task.

1. Navigate to the Task Details screen by tapping the desired task.
2. Navigate to the Travel Summary screen by tapping the Travel menu present in the Task Details screen. This screen allows you to view/edit existing Travel lines. You can create a new Travel line by tapping the Add Travel menu. If there is no travel debrief exists, Add Travel screen opens directly.
3. Tap Add Travel to add a new travel debrief or tap an existing travel line to open the Travel screen in the edit mode. In case of completed tasks, the debrief lines will be displayed in read-only mode.
4. Business Process and Service Activity Code will be defaulted. You may change these values by selecting appropriate dropdown using caret symbol.
5. Start Time: The default start date and time is displayed based on the CSF: Default Labor Debrief Date/Time profile option. You may edit the date and time using the date and time picker widget.

Business Process  
 Field Service

Service Activity  
 Loaner

Start Time  
 2016-08-17 02:32 PM




Duration  
 1

UOM  
 Minute


End Time


Actions



6. Duration: Gets defaulted from the Task Type setup.
7. UOM: The default Unit of Measure defaults from the Task Type setup.
8. End Time: Gets calculated from Start Time and the Duration. You may edit the date and Time using the date and time picker widget.
9. Travel Item: You can choose appropriate travel item using the Item lov.
10. If the service request has multiple products, you will see the Parent Instance and Parent Serial fields.


12:47   



[← Back](#) **Add Travel** [Save](#)



Business Process 



Service Activity 


Start Time  
2021-04-15  03:27 PM 


Duration  UOM  
Hour 

End Time  
2021-04-16  03:27 PM 

Parent Instance   

Parent Serial   

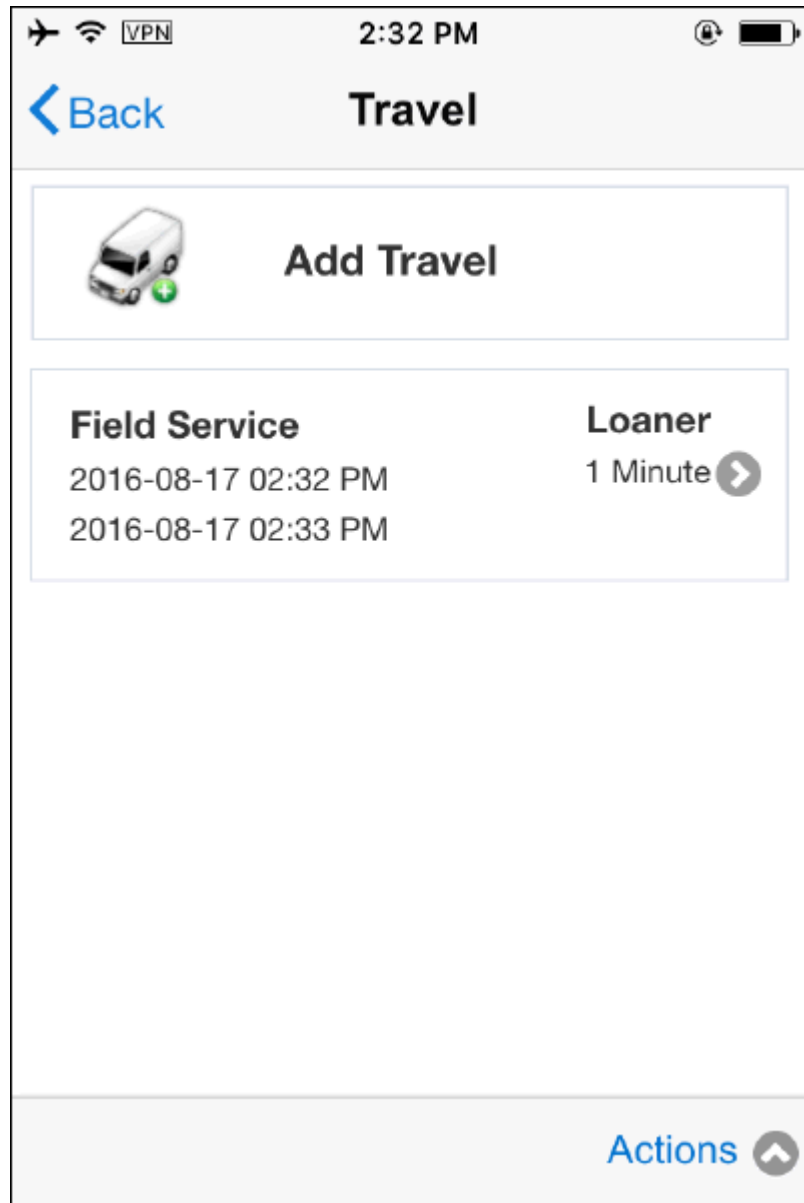
Reason 

[Actions](#) 

11. There are two ways in which you can select the product for debrief:
  - You can enter the instance number and serial number manually. You can also

scan the barcode of the instance number or serial number.

- You can use search and select from the list of values.
12. For travel debrief lines, the default value is the primary product. You can select other non-primary products.
  13. Tap Save icon to save the Travel debrief line.
  14. Tap Back icon to go to the Travel Summary screen without saving the line.



15. You may delete the saved debrief lines by tapping Delete icon. Delete option is available in the Action menu. Delete is not allowed once the task is completed.

Note: If the profile CSF: Default Labor Debrief Date/Time is set to Status Change, travel line will be automatically created upon status transition.

Actions menu provides additional context sensitive actions.

### **Adding Labor Debrief:**

You may create a labor line to report how much labor time involved in the completion of the task. MFS application enables you to add labor lines during the case progression. Additionally, you can enforce mandatory labor debrief by adding business rules that restricts users to close the task until you create a labor line.

Complete the following steps to add labor debrief lines to a task:

1. Navigate to the Task Details screen by tapping the desired task.
2. Navigate to the Labor Summary screen by tapping the Labor menu present in the Task Details screen. This screen allows you to view and edit existing Labor lines. You can create new labor line by tapping the Add Labor option.
3. Labor Summary page opens if you created a labor debrief earlier. If no Labor debrief exists, Add Labor screen opens directly.



The screenshot displays the 'Add Labor' screen in a mobile application. At the top, the status bar shows airplane mode, Wi-Fi, VPN, and the time 2:33 PM. The app header includes a back arrow, the title 'Add Labor', and a 'Save' button. The form contains the following fields:

- Service Activity:** SAC\_mfs (with a dropdown arrow)
- Start Time:** 2016-08-17 (with a calendar icon) and 02:33 PM (with a clock icon)
- Duration:** 1 (with a text input underline)
- UOM:** Minute (with a dropdown arrow)
- End Time:** 2016-08-17 (with a calendar icon) and 02:34 PM (with a clock icon)
- Reason:** (with a dropdown arrow)

At the bottom of the screen, there is an 'Actions' button with an upward-pointing arrow.

4. Tap Add Labor to add a new labor debrief or tap an existing labor line to open the Labor screen in the edit mode. In case of tasks that have been completed, the debrief lines display in a read-only mode.
5. Business Process and Service Activity Code will be defaulted. You may change the values by selecting appropriate dropdown using caret symbol.
6. Start Time: The default start date and time is displayed based on the CSF: Default Labor Debrief Date/Time profile option. You can edit the date and time using the date and time picker widget.



7. Duration: Gets defaults from the Task Type setup.
8. UOM: The default Unit of Measure defaults from the Task Type setup.
9. End Time: Gets calculated from Start Time and the Duration. You can edit the date and Time using the date and time picker widget.
10. Labor Item: You can choose the appropriate labor item using the LOV.
11. If the service request has multiple products, you will see the Parent Instance and Parent Serial fields.

12:47 📶 🔋



[← Back](#) **Add Labor** [Save](#)


Business Process  
FS Business Process ➤


Service Activity  
FSLabor ➤

Start Time  
2021-04-15  03:27 PM 


Duration UOM  
24.000 Hour ➤

End Time  
2021-04-16  03:27 PM 

Parent Instance 🔍   
\_\_\_\_\_

Parent Serial 🔍   
\_\_\_\_\_

Reason ➤

[Actions](#) 

12. There are two ways in which you can select the product for debrief:

- You can enter the instance number and serial number manually. You can also scan the barcode of the instance number or serial number.

- You can use search and select from the list of values.

13. No default value is displayed for labor debrief. You must choose from the available products.

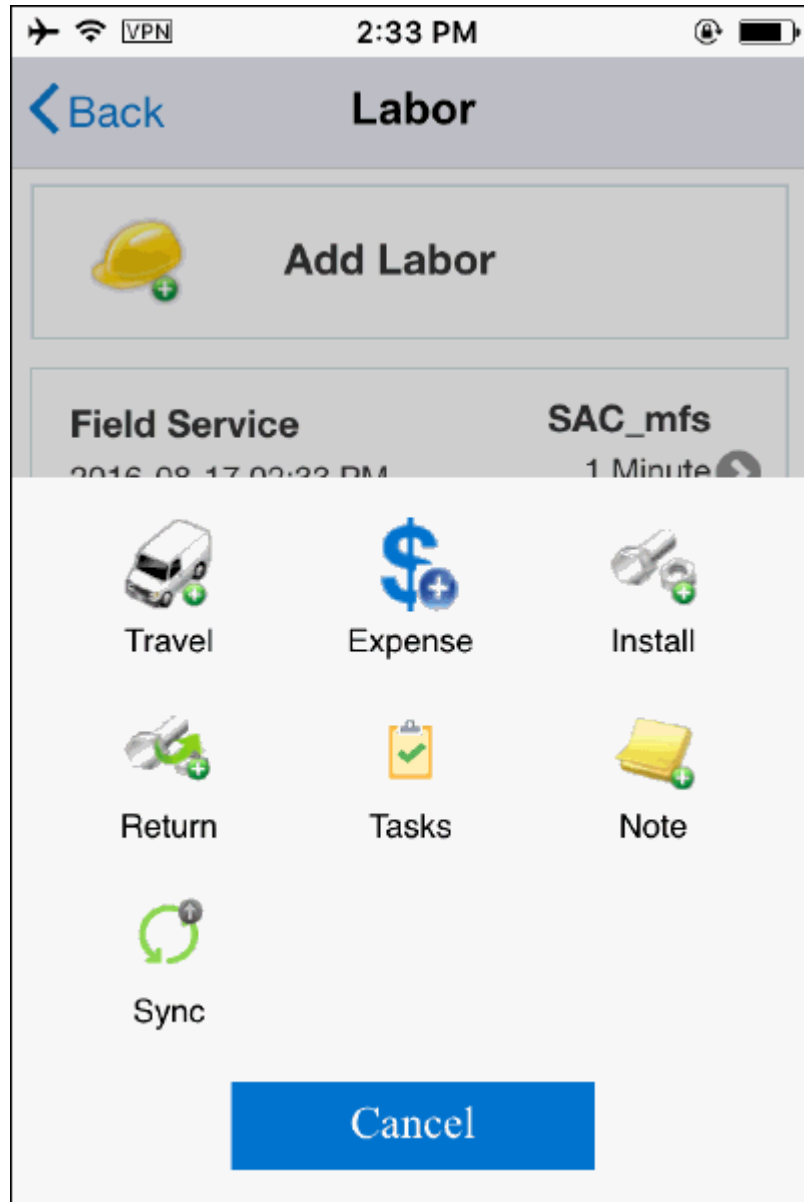
14. Tap Save icon to save Labor debrief line.

15. Tap Back icon to go to Labor Summary screen without saving the line.

16. You may delete the saved debrief lines by tapping Delete icon. Delete option is available in the Action menu. Delete is not allowed once the task is completed.

Note: If the profile CSF: Default Labor Debrief Date/Time is set to Status Change, travel line will be automatically created upon status transition.

Actions menu provides additional context sensitive actions.



### **Adding Material Install Debrief:**

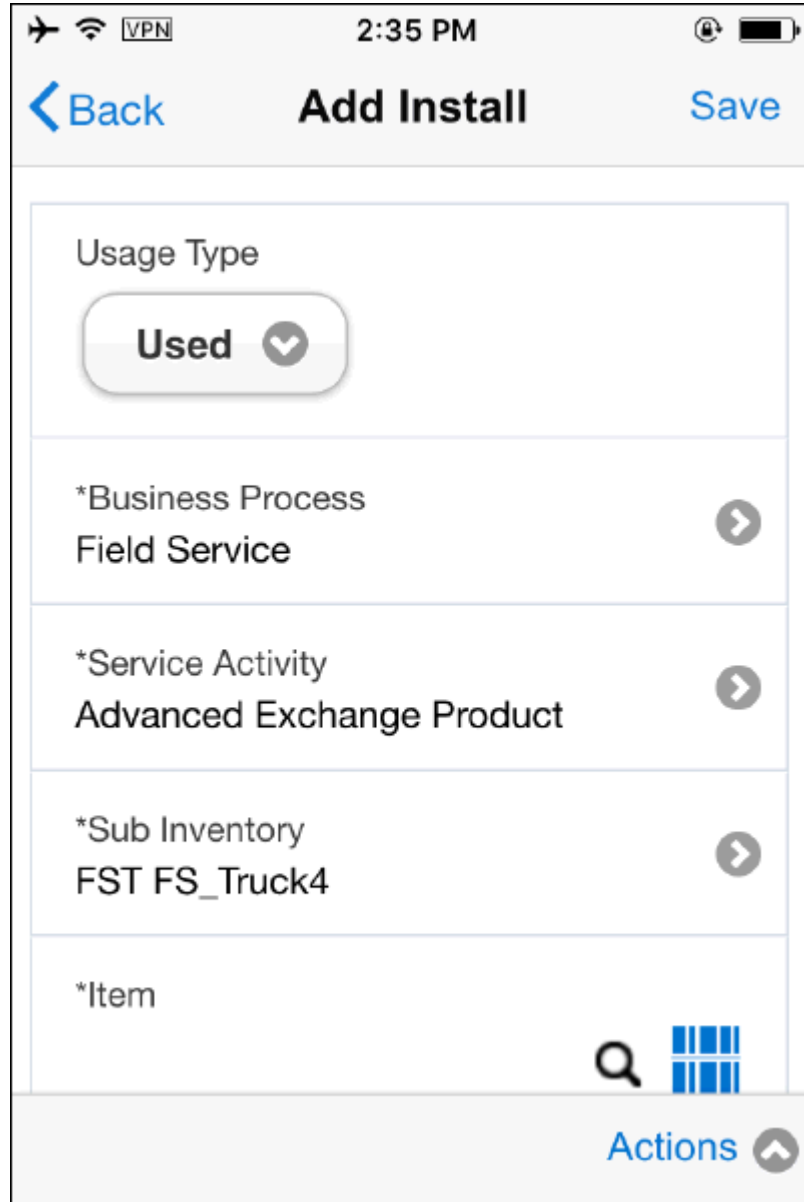
You may report on installed material using Material Install. Reporting of items installed and recovered is necessary to plan for the supply of service parts, to maintain the installed base, and to generate an invoice for material used. Material information is entered is used to update Oracle Inventory, Install Base, and Charges. You may create multiple material lines for a given task assignment. You cannot modify material lines that have been submitted to Charges. You can however, add new material lines. If the service request has multiple products, you can create debrief for the primary as well as the non-primary products.

### Prerequisites

You must have Oracle Spares Management fully implemented.

Complete the following steps to add material install debrief lines to a task:

1. Navigate to the Material Install Debrief Summary screen by tapping Install menu present in the Task Details screen. This screen allows you to view and edit existing material lines. You may create new material install line by tapping the Add Install option.
2. Tap Add Material to create a new material debrief line. Tap any existing material line (if any) to open the Material Install screen in the edit mode. In case of tasks that have been completed, the debrief lines display in a read-only mode.



3. Select one of the following Usage Types using the usage type drop downs:
  - Defective On Arrival (DOA): Select this option if you find the item defective upon arrival and needs to be shipped back to a defective warehouse.
  - Unused: Select this option if the item is not used during debrief and must be shipped back to the Usable warehouse.
  - Used: Select this option to install the Item at customer location.

For DOA and Unused types, Business Process and Service Activity Code will not be

rendered. Additionally, fields such as Destination Organization, Destination Subinventory, ship to address, carrier, shipment number (mandatory only if the transaction is of Inter Org transfer type), and waybill number are displayed. This information is essential in order to route the item to the appropriate destination.

Note: You need to setup return routing rules in spares management module in order to create accurate routing transactions for Defective On Arrival and Unused item. Additionally, you have to enable CSF: Enable Return Routing profile. Refer Spares Management implementation guide to learn more details on how to setup return routing rules.

4. Business Process, Service Activity Code, and the default Subinventory will be defaulted once you choose Usage Type "Used". You may change the values by selecting appropriate dropdown lov using caret symbol.
5. Enter or select the item number. Once you select the item number, Item Description, Disposition status, Quantity, and UOM will be defaulted. In case of Non Serial item, you can change the quantity.
6. Additionally, On-hand Quantity and Available Quantity will also be defaulted.
7. Return Debrief checkbox is used to check whether Return debrief lines should be created after saving the install line. If this flag is checked, Return screen will be launched after you save the install debrief record. This helps you to create Return lines quickly.

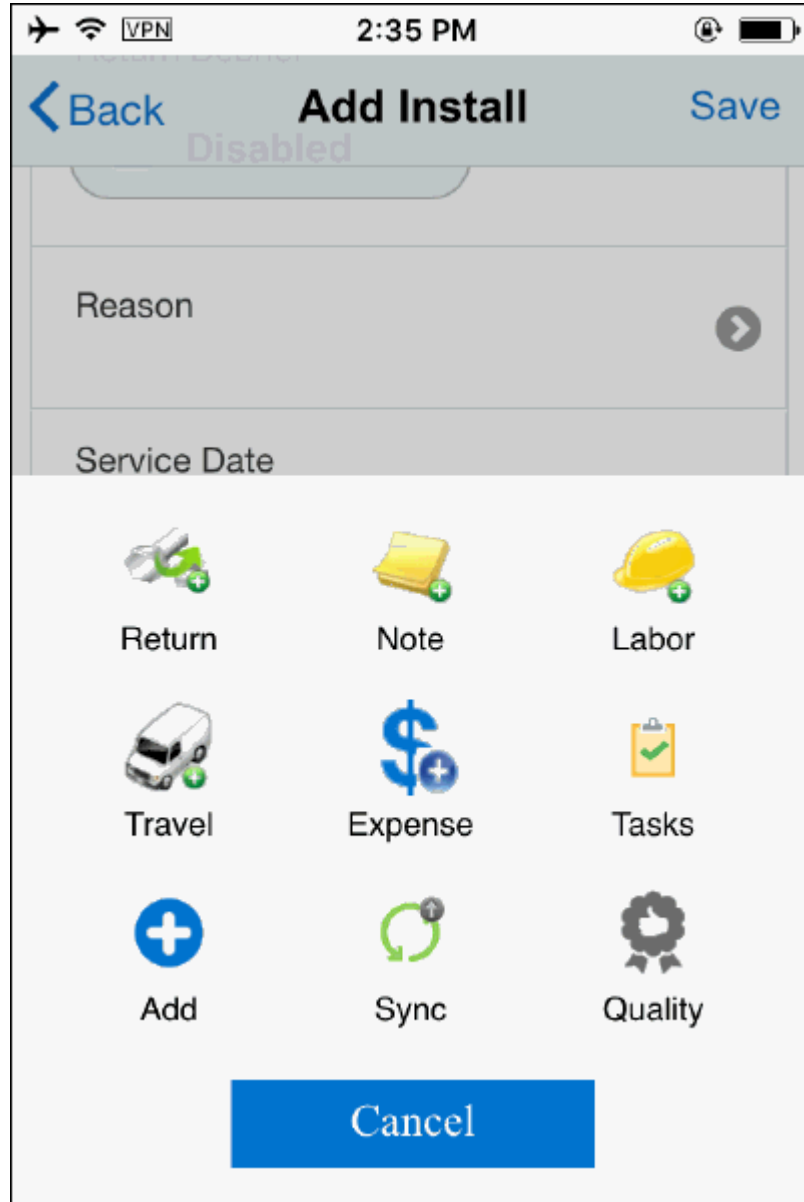


The screenshot displays the 'Add Install' screen in a mobile application. At the top, the status bar shows airplane mode, Wi-Fi, VPN, the time 2:35 PM, and battery level. The app header contains a blue 'Back' button, the title 'Add Install', and a blue 'Save' button. The form consists of several sections: a text field for '\*Description'; a section with '\*Quantity' (input: 1) and '\*UOM'; a 'Return Debrief' section with a toggle switch set to 'Disabled'; a 'Reason' section with a right-pointing arrow; and a 'Service Date' section. At the bottom right, there is an 'Actions' button with an upward-pointing arrow.

8. If the item is Serial Controlled, you can capture serial number using Search and Find Icon or by using the bar code scanner. Instance Number will be backfilled when you select the Serial Number.
9. If the item is not Serial Controlled, you may capture Instance Number by using Search and Find Icon or by using the bar code scanner. Serial Number field will not be rendered if the item is not Serial Controlled.
10. Additionally, you may capture fields such as Recovered Instance, Recovered Serial, Parent Instance, and Parent Serial, in order to complete the transaction. If the service request is created with Install Base instance details, Parent Instance and

Parent Serial fields will be pre populated.

11. If you select DOA or Unused as your Usage Type, you need to enter additional information such as:
  - Destination Organization and the Destination Sub Inventory fields will be pre populated
  - Enter Ship To Address and Carrier
  - Enter Shipment Number and Waybill.
12. Select Revision if the item is revision controlled.
13. Select Locator if the item is locator controlled.
14. If the service request has multiple products, you will see the Parent Instance and Parent Serial fields.
15. There are two ways in which you can select the product for debrief:
  - You can enter the instance number and serial number manually. You can also scan the barcode of the instance number or serial number.
  - You can use search and select from the list of values.
16. When the service request has multiple products, no default value is displayed for material debrief. You must choose from the available products.
17. Tap Save icon to save the material debrief line.



18. Tap Back icon to go to the Material Summary screen without saving the line.

19. You may delete the saved debrief lines by tapping Delete icon. Delete option is available in the Action menu. Delete is not allowed once the task is completed.

Actions menu present in the Task screen provides context sensitive actions for the technician.

### **Adding Material Return Debrief:**

Material Return screen is used to capture debrief lines when items are removed from

the customer site. For example, if a part installed at the customer site has to be retired because it is worn out, the technician enters the details of the worn out part in the Material Return section.

#### Prerequisites

You must have Oracle Spares Management fully implemented.

Complete the following steps to return parts:

1. Navigate to the Material Return Summary screen by tapping the Return menu present in the Task Details screen. This screen allows you to view and edit existing material lines. You can create a new material return line by tapping the Add Return menu.

✈️ 📶 VPN 2:36 PM 🔒 🔋

⬅️ Back Add Return Save

\*Business Process  
Field Service ➔

\*Service Activity  
Return

\*Sub Inventory  
D2 DF Truck9 ➔

\*Item  
🔍 📊

Description

Actions ⬆️

2. Business Process, Service Activity Code, and the default defective Subinventory will be defaulted. You can change the values by selecting appropriate dropdown using caret symbol.
3. You can enter or choose one of the following option to select the item:
  - Search and Find icon allows to search the item
  - Bar Code scan icon allows you to scan the item using scan the Item Number. Bar Code scan icon launches native device camera that allows you to scan the bar code scan.

4. Once you enter the Item Number, it gets validated against the local database. If the validation fails, it checks whether the Item details are available in the server (if the device is online) and downloads the Item details to the local device and you can create a return debrief.

Due to the offline nature, an additional business rule has been implemented to restrict the number of items download when you install the client application for the first time. Following logic depicts how Server side concurrent program JTM: Master Concurrent program (with INV parameter) downloads items during the initial sync:

- Item instance specified in the service requests along with its descendants (up to two levels) is downloaded.
  - Most frequent items that are returned from all customer locations globally are downloaded based on the combination of following two profile options.
    1. CSM: Maximum Number of Items: This profile determines the maximum number of items to be downloaded. This profile must be set at the responsibility level. The default value is 500.
    2. CSM: Return Activity Duration: This profile sets the duration of the return activity. For example, if this profile is set to 90 days, concurrent program:
      - First fetches items that are returned from various customer sites during the past 90 days
      - Creates a list of most frequently returned items from above list
    3. This profile must be set at the responsibility level. The default value is 90 days.
    4. The concurrent program does not download any supersession or substitute items associated with the most frequently downloaded items.
5. Enter Quantity if the item is Non Serial Controlled. In case of Serial item, Quantity field will be defaulted to one.
  6. Enter Instance or Serial Number in the respective field. These fields are bar code enabled.

The screenshot displays the 'Add Return' screen in a mobile application. At the top, the status bar shows airplane mode, Wi-Fi, VPN, and the time 2:36 PM. The app header includes a back arrow, the title 'Add Return', and a 'Save' button. The main form area contains several fields:
 

- \*Quantity**: A text input field containing the number '1'.
- \*UOM**: A text input field.
- Instance**: A text input field with a search icon and a barcode icon to its right.
- Serial Number**: A text input field with a search icon and a barcode icon to its right.
- \*Return Reason**: A text input field with a right-pointing arrow icon to its right.
- Discount**: A text input field.

 At the bottom of the screen, there is an 'Actions' button with an upward-pointing arrow.

7. Confirm Destination Organization, and Destination Sub-Inventory. These fields are defaulted based on your return routing rule setup.
8. You may enter additional fields such as Carrier, Shipping Method, Way Bill, Shipment Number.

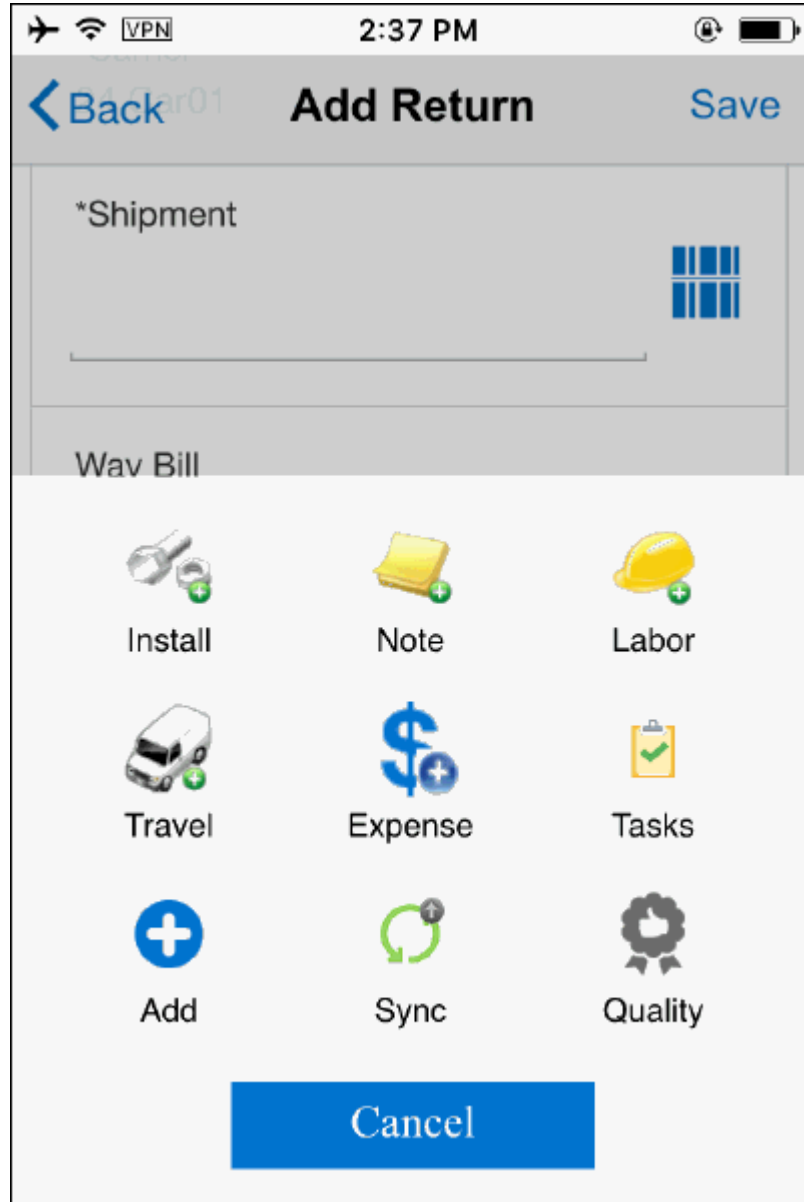
The screenshot displays the 'Add Return' screen in a mobile application. At the top, there is a status bar with icons for airplane mode, Wi-Fi, VPN, and battery, along with the time '2:36 PM'. Below the status bar is a header with a blue 'Back' button, the title 'Add Return', and a blue 'Save' button. The main content area consists of several rows, each representing a form field:

- Justification:** A text input field with a right-pointing arrow icon.
- \*Service Date:** A date field showing '2016-08-17' with a calendar icon, and a time field showing '02:36 PM' with a clock icon.
- Destination Organization:** A text input field with a right-pointing arrow icon.
- Destination SubInventory:** A text input field with a right-pointing arrow icon.
- Ship To Address:** A text input field.
- \*Carrier:** A text input field with a right-pointing arrow icon.

At the bottom of the screen, there is a grey bar with a blue 'Actions' button and an upward-pointing arrow icon.

9. If the line level flexfields are enabled, you may enter this information also.
10. Select Revision if the item is revision controlled.
11. Select Locator if the item is locator controlled.
12. Tap Save icon to save the Return debrief summary screen.





13. Tap Back icon to go to the Return Summary screen without saving the line.

14. You may delete the saved debrief lines by tapping Delete icon. Delete option is available in the Action menu. Delete is not allowed once the task is completed.

Actions menu present in the Task screen provides context sensitive actions for the technician.

### **Adding Expense Debrief:**

Material Expense screen is used to capture all expenses during the task. Expenses can be

your travel expenses, Hotel accommodation, and other miscellaneous expenses that you incur during the case progression.

You may create multiple expense lines for the task. As a technician, you cannot modify expense lines that have been submitted to Charges. Technicians can however, add new expense lines for the task as long as the task assignment status is not 'Closed'.

Complete the following steps to create expense line parts:

1. Navigate to the Task Details screen by tapping the desired task.
2. Navigate to the Expense Summary screen by tapping the Expense menu present in the Task Details screen. This screen allows you to view and edit existing expense lines. You can create a new expense line by tapping the Add Expense option.
3. Expense Summary page opens if you created an expense debrief earlier. If no expense debrief exists, Add Expense screen opens directly.

12:47 📶 🔋

Service Activity  
⬅️ Back **Add Expense** Save

\*Item 🔍

---

\*Description

---

Amount Currency  
US dollar ➡️

---

Quantity UOM ➡️

---

Service Date 📅  
2021-07-12 12:47 PM 🕒

---

Parent Instance 🔍 📊

---

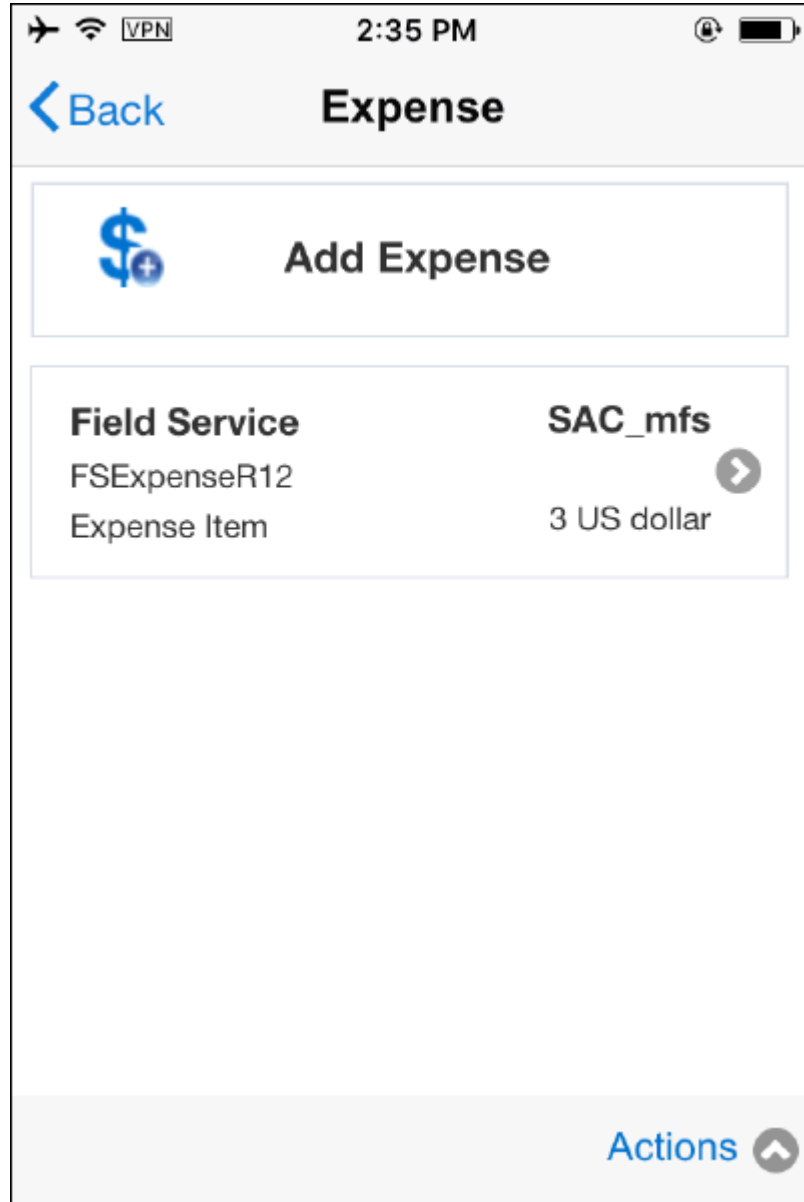
Parent Serial 🔍 📊

---

Actions ⬆️

4. Enter your expense Item or choose the Item using Search and Find icon.

5. Once you enter the Item Number, Description will be automatically populates in respective field.
6. Enter expense amount.
7. The Currency field default value is based on the currency set for the profile option: JTF\_PROFILE\_DEFAULT\_CURRENCY. You can change the value if necessary.
8. Select a Service Date from the date list of values. The system date appears by default.
9. If the service request has multiple products, you will see the Parent Instance and Parent Serial fields.
10. There are two ways in which you can select the product for debrief:
  - You can enter the instance number and serial number manually. You can also scan the barcode of the instance number or serial number.
  - You can use search and select from the list of values.
11. The primary product is displayed by default. You can choose from the available products.
12. Tap Save icon to save the Expense line. Newly created Expense line displays in the Expense summary screen.



13. Tap Back icon to go to the Expense Summary screen without saving the line.

14. You may delete the saved debrief lines by tapping Delete icon. Delete option is available in the Action menu. Delete is not allowed once the task is completed.

Actions menu present in the Task screen provides context sensitive actions for the technician.

## Related Topics

**Record Counter Readings**

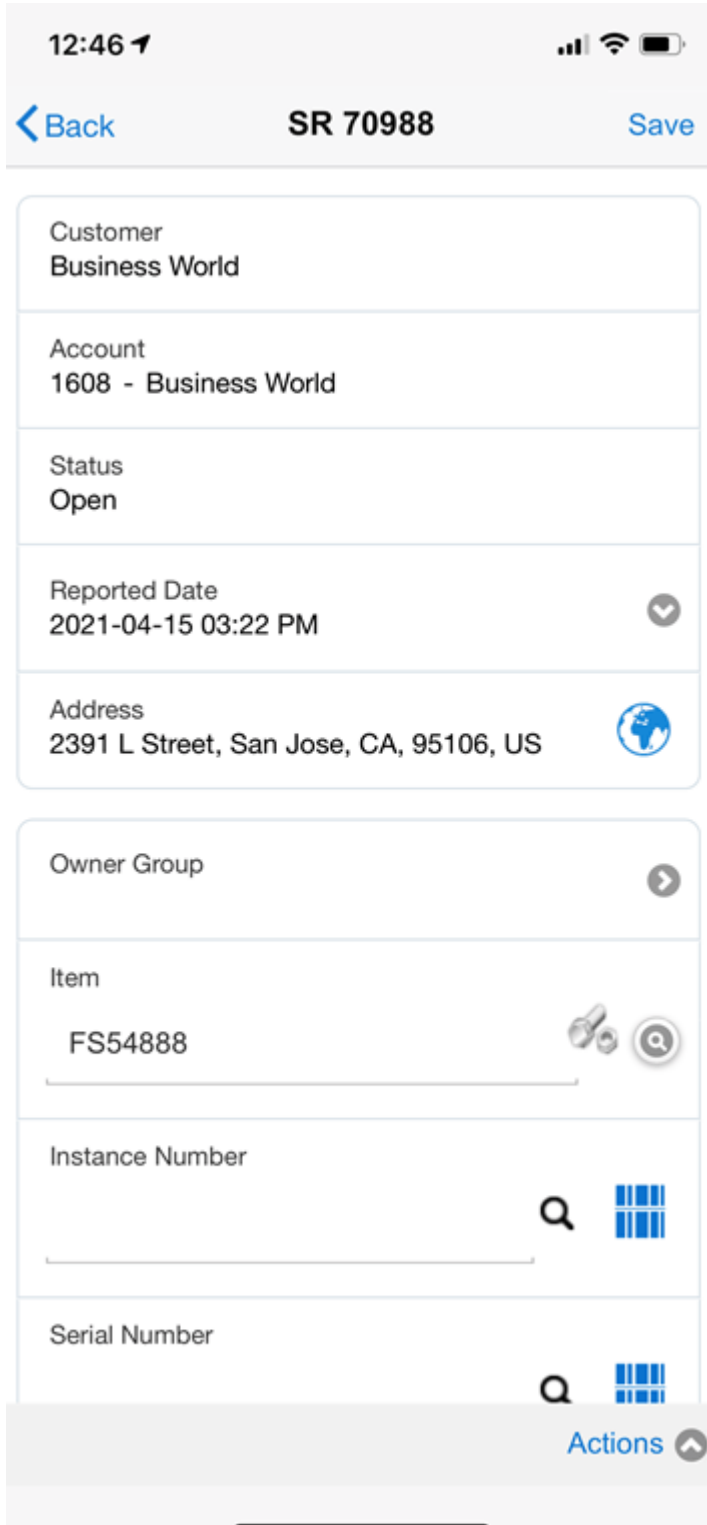
Optionally, you can record counter readings. Counter readings can only be recorded for customer products defined in the installed base that have a counter assigned to them. When no counter is associated with the product, the counters region does not display.

MFS display an alert if you failed to capture reading for a counter enabled install base item. MFS application raises this alert when the task assignment status is changed to either 'Completed' or 'Closed'.

## Viewing Service Request Details

To view the details of the service request associated with the task:

1. Navigate to the Task Details screen and click on the service request link.  
Alternatively, you can navigate to the springboard by tapping on Home and then tap Service Requests. This opens the SR list. Select any service request to go to the SR Details screen.
2. In the SR Details screen, you can see all the details about the service request.



3. Scroll to the Item details. If there are multiple products linked to the service request,

you will see an icon in this Item region.

4. Click on this icon to open the SR Products screen where you will see a list of all the products that are associated with this service request. The primary product is the product on the service request header. All other products are non-primary products. You can view the following attributes for each item:
  - item name
  - item description
  - instance number
  - serial number
  - external reference/TAG



12:46 ↖



[← Back](#)

## SR Products

<b>FS54888</b> Sentinel Standard Deskto...	<b>Primary</b> 2021-04-17 0...
<b>FS18947</b> Sentinel Deluxe Desktop -...	2021-04-17 0...
<b>FS1111</b> FS Item Lot Control + No I...	2021-04-17 0...
<b>FS89107</b> Power / Recharging Unit	2021-04-17 0...
<b>FS90000</b> Power/Recharging Unit	2021-04-17 0...
<b>AS10000</b> 405 Digital Camera	2021-04-17 0...
<b>FS66629</b> Envoy Ruggedized Laptop	2021-04-17 0...

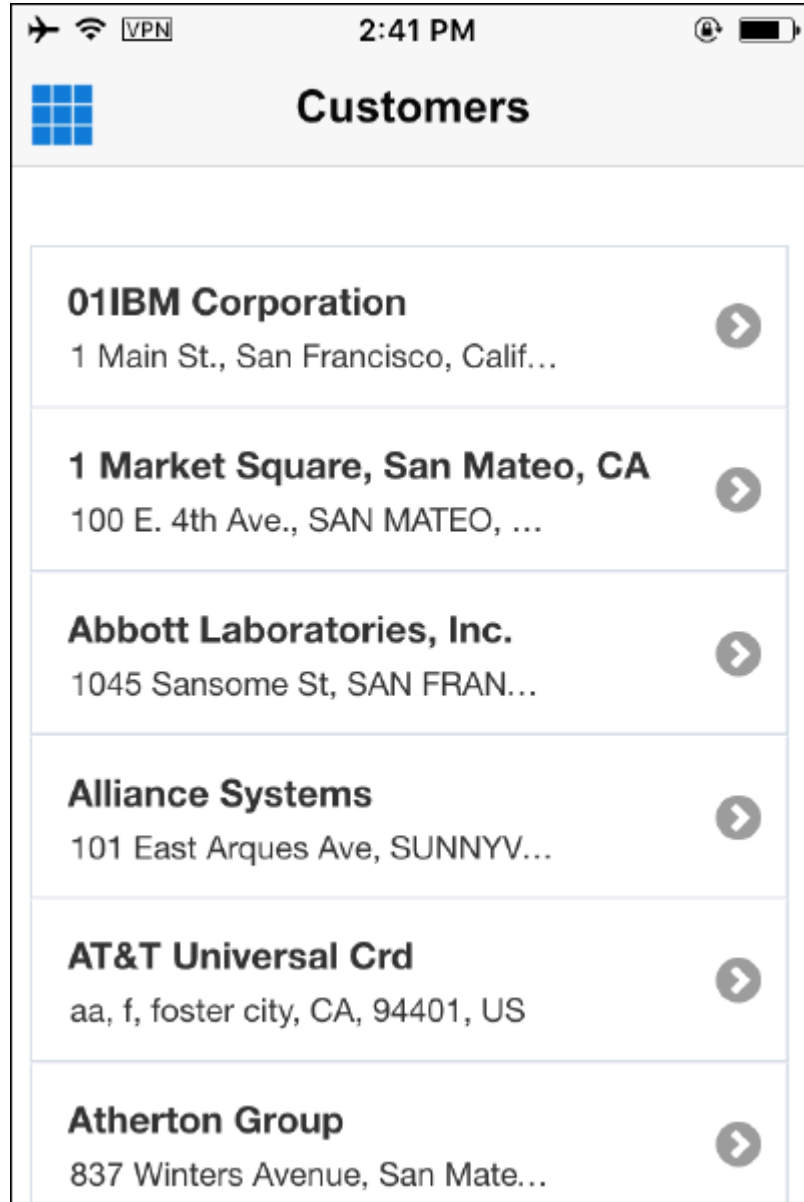
## Viewing Customer Information

Customer screen displays list of all customers with active tasks assigned to the technician.

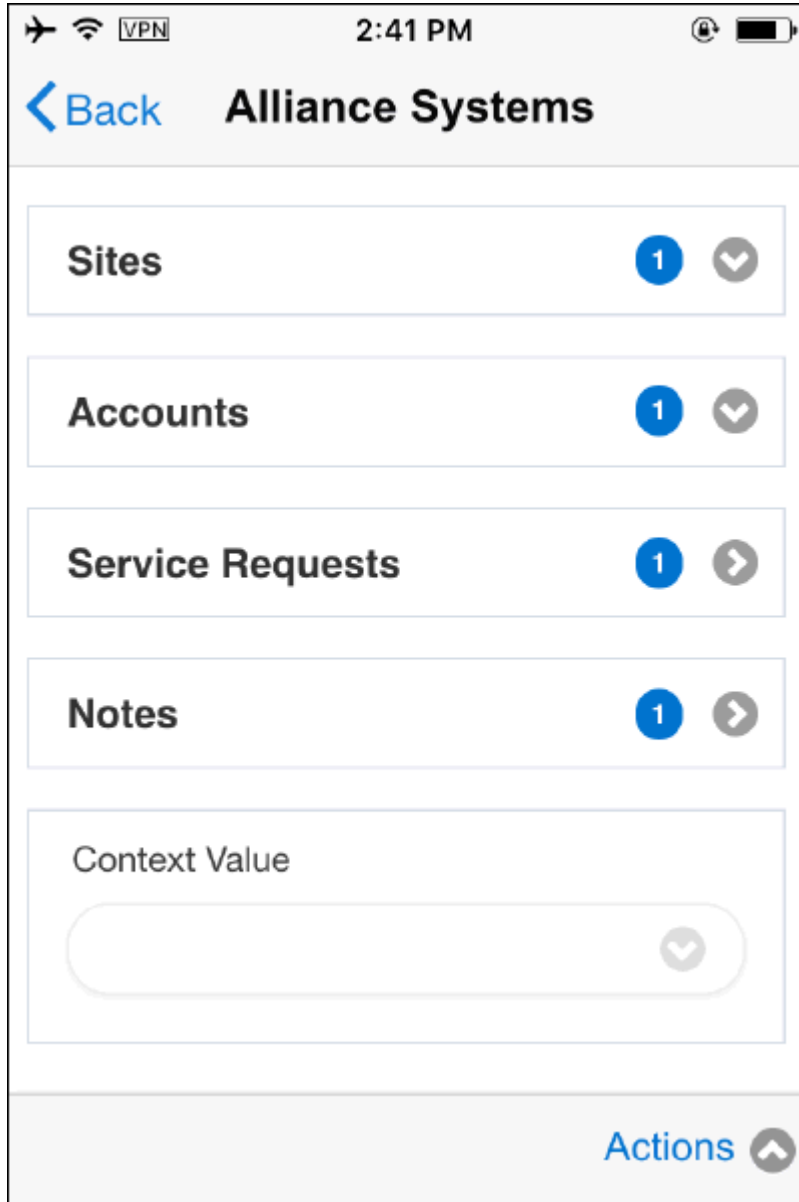
You can create Service Request by tapping any one of the attribute displayed in the screen. For example, you can create a new service request by tapping customer's account number.

Complete the following steps to view customer information:

1. Navigate to the Springboard.
2. Tap customer icon to launch Customers screen. This screen displays a list of customers that has active task assigned to you.



3. You may tap customer record to launch Customer Details screen to view more details about the customer.



4. Customer Details screen displays Site, Accounts Service Requests, and Notes. The badge icon displays number of records available for that attribute. For example, Site field badge shows numeric one which means there is only one Site details downloaded for the customer. The badge 3 against Service Request represents the number of active service requests assigned to you from this customer.

## Creating and Viewing Task Notes

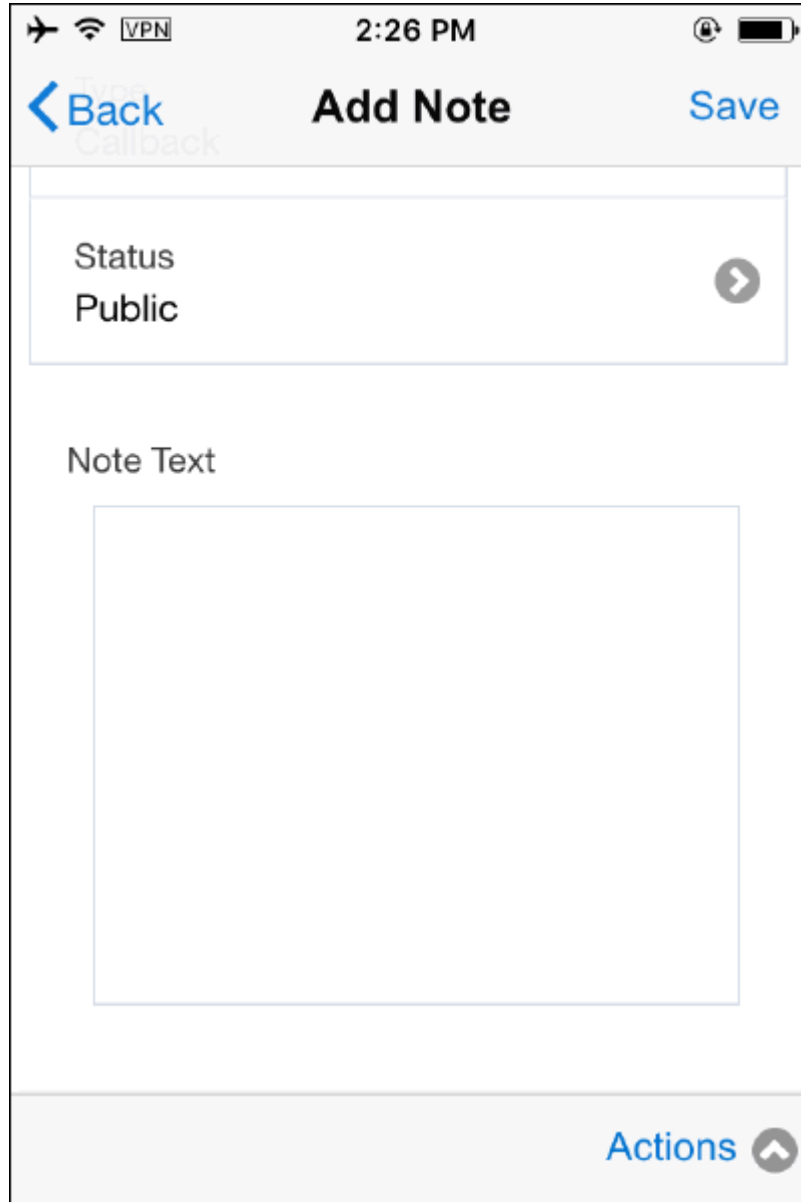
You may create Notes for a number of reasons. For example, Dispatcher may want to add troubleshooting tips or actions plans that may assist field technicians when they are

at the customer site. Additionally, as a field technician, you may create additional notes as feedback/comments about the work done for the task.

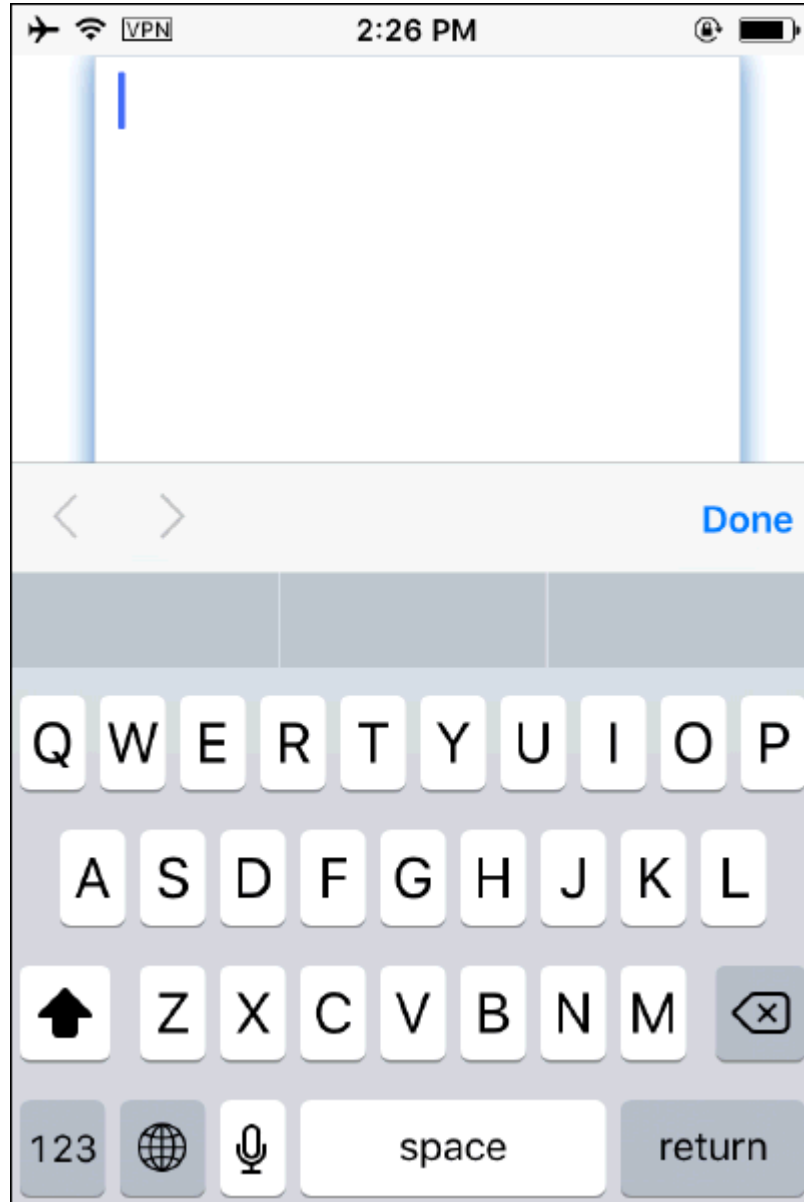
Note feature is supported at both Service Request level and at Task level.

Complete the following steps to create or view the Notes:

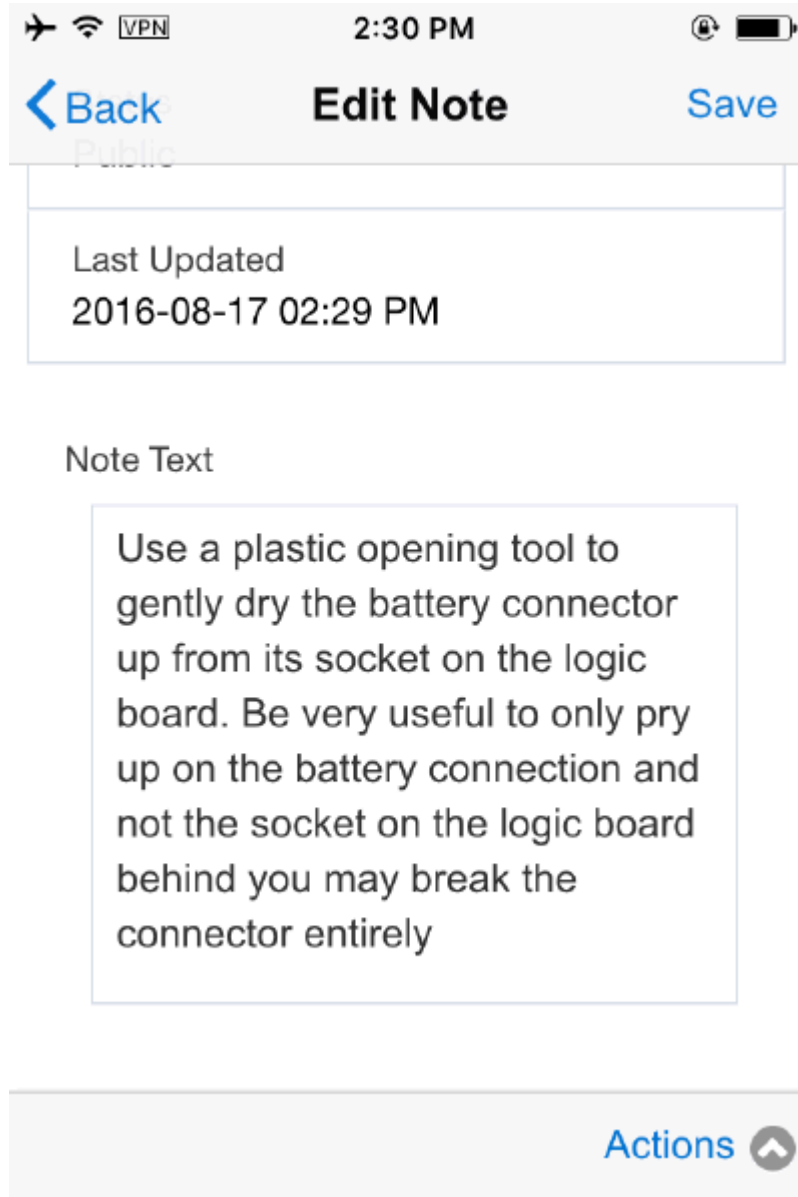
1. Navigate to the Task Details screen by tapping the appropriate task.
2. Navigate to the Note Summary screen by tapping the Note menu present in the Task Details screen. This screen allows you to view existing Note(s) if there is a note already downloaded from the server or created earlier.
3. Tap Add Note to create a new note.



4. Select the type of the note from the Type or you can choose the defaulted value.
5. You can set the visibility by setting an appropriate Status. For example, if you want to set the note to be visible to everyone, you may set the status to Publish. Other available statuses are public and private.
6. Enter the note text in the Note Text field. You can enter up to 2 GB data in this field.



7. Tap Save to save the line and go back to Note Summary screen. Newly created note displays in the Note summary screen. This Note is added to the task in context.
8. The Edit/View icon toggles between Edit and View each time when you tap the icon. You may bring the window to edit mode in order to edit the text.



9. Tap Back to go back to the Note Summary screen without saving the line.
10. Toggle button (Edit/View) present displayed on the screen allows you to edit the note.

## Creating and Viewing 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 at the task level or at the service request level. These attachments will be



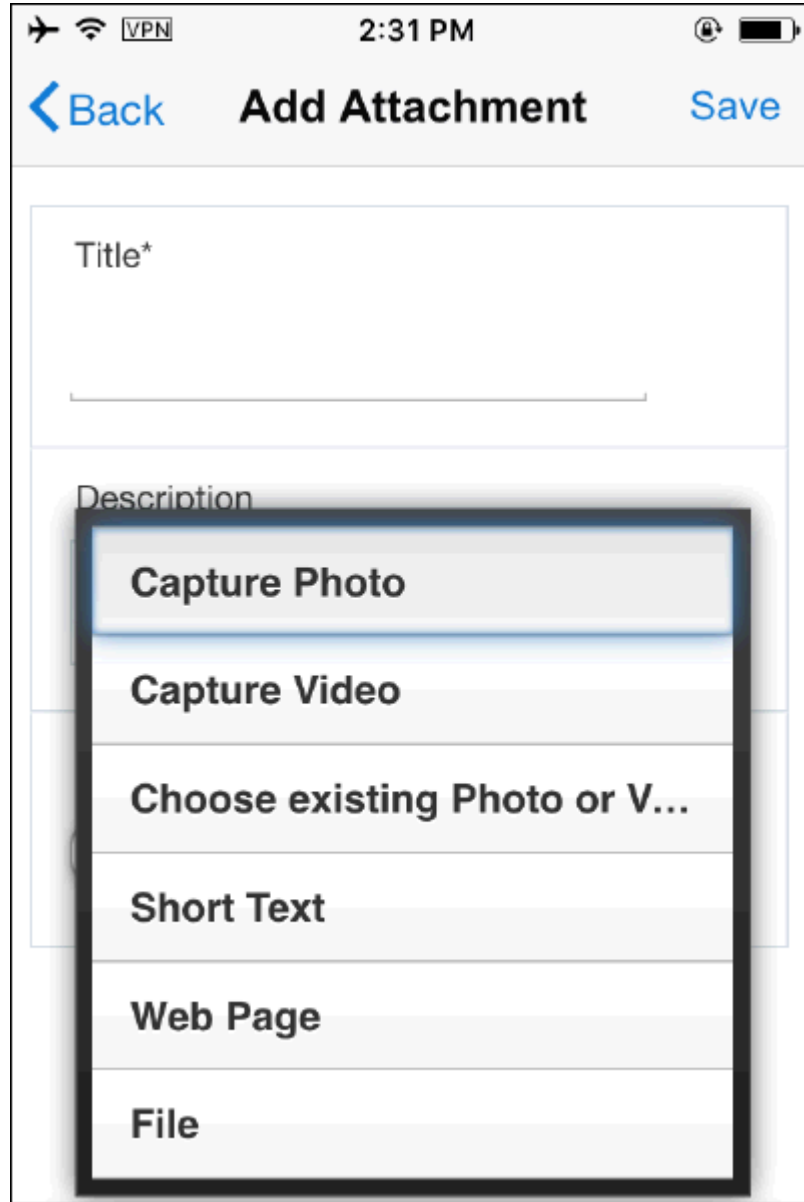
uploaded to the server during the next synchronization and expert technicians can analyze the problem remotely and provide accurate troubleshooting guidance to the onsite technician.

Complete the following steps to add a new attachment to a task:

1. Navigate to the Task Details screen by tapping the desired task.
2. Navigate to the Attachment Summary screen by tapping the Attachment menu item from the Task Details screen. This screen allows you to view existing attachments if there are any attachments downloaded from the server.
3. You can create new attachments by tapping the Add Attachments menu.

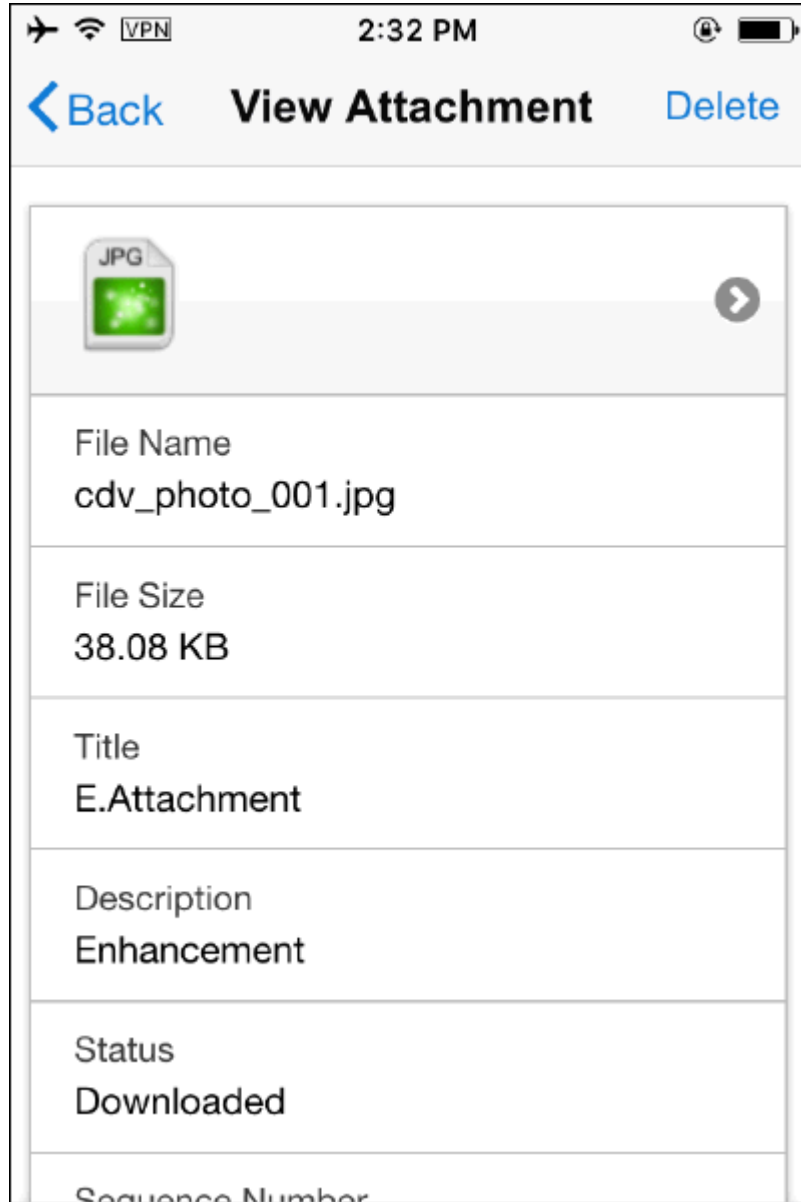
The screenshot displays the 'Add Attachment' screen in a mobile application. At the top, there is a navigation bar with a blue back arrow on the left, the title 'Add Attachment' in the center, and a blue 'Save' button on the right. Below the navigation bar, the form is organized into three distinct sections, each enclosed in a light gray border. The first section is labeled 'Title\*' and contains a single-line text input field. The second section is labeled 'Description' and contains a multi-line text area. The third section is labeled 'Type\*' and contains a rounded rectangular dropdown menu with a downward-pointing arrow on the right side. The status bar at the very top of the screen shows various system icons: airplane mode, Wi-Fi, VPN, the time 2:31 PM, a lock icon, and a battery level indicator.

4. Enter Title and a brief description about your attachment.
5. Choose appropriate File type. You can attach photo, video, short text file, web links, or files. In case of photos/videos, the app allows you to either capture them using device camera or add existing photos/videos from the photo library.



Note: Attachment functionality differs from iOS to Android platforms. This functionality is much more restricted in iOS. In Android, besides Photos/Videos etc any file present on the mobile device can be attached.

6. Once you attach the object successfully, you can view the metadata regarding the attached objects such as name, file size, status, content type, etc.



7. Tap Save icon to save the line and go back to Attachment Summary screen. Attachment is added to the task in context.
8. Tap Back icon to go back to the Attachment Summary screen without saving the line.

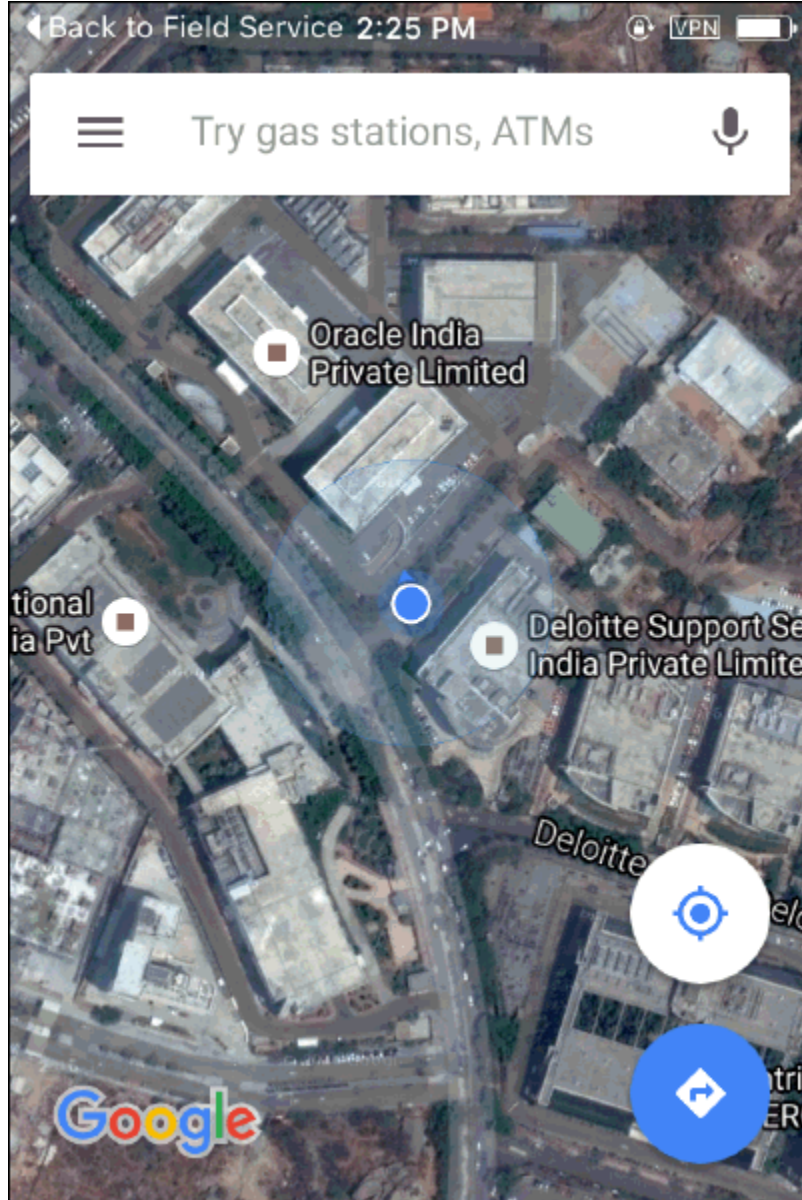
Note: The CSM: Maximum Attachment Size profile controls the maximum size of attachment to be downloaded or uploaded. The attachment size must be specified in mega bytes.

The file will not be uploaded or downloaded if it exceeds the size mentioned in the profile. In case of multiple attachments, the first n files, whose combined size less

than the size mentioned in the profile value, will be uploaded or downloaded.

## Accessing Map and Driving Directions

Map provides the ability to view the task location in the map. As a Field technician, you may view driving directions between your current location and the task address by tapping the map icon present in the Task Details screen. By default, MFS integrates with Google map.



When you install the application for the first time, you may grant location access for MFS app when prompted in order to find current location. If you choose not to enable

the Location finder, the app uses the technicians' primary address stored in Oracle Spares Management as the current location.

Complete the following steps to find the directions:

1. Tap Map icon displayed in the Address region.
2. Map is launched in a separate browser. Depending on the type of map, you may choose the appropriate function to find the direction. In case of Google map, you may tap the small map region to get the direction.

The map provides step by step direction as well as voice assisted direction. Oracle Store and forward Multiplatform Application integrates with Google map.

## Creating Follow Up Task

For a variety of reasons, such as time constraints, shortage of parts, or not having enough skills to address the task immediately, you may not be able to complete the work by yourselves. In these cases, you can create a follow-up task and let the Dispatcher assigns the task to the next available resource.

### Prerequisites

A task must be assigned to the resource.

Complete the following steps to create follow up tasks:

1. Navigate to the Task Details screen by tapping one of the tasks present in the Task List screen.
2. Tap Action to launch Action menu.
3. Tap Follow-Up menu. Create Task screen will be launched.

The screenshot displays the 'Create Task' screen in a mobile application. At the top, there is a status bar with icons for airplane mode, Wi-Fi, VPN, and battery, along with the time 2:39 PM. Below the status bar is a navigation bar with a blue 'Back' button on the left, the title 'Create Task' in the center, and a blue 'Save' button on the right. The main content area consists of five vertically stacked form sections, each with a label and a value, and a right-pointing chevron icon on the right side of each section:

- Name:** The value is 'Sanity'.
- Description:** The field is currently empty.
- Status:** The value is 'In Planning'.
- Type:** The value is 'Dispatch'.
- Priority:** The value is 'Low'.

4. Enter Name for the task.
5. Enter a brief Description for the task.
6. Default Status will be displayed. In general, implementers prefer to have is In Planning status. You may set your preferred status using the profile setup in the server.
7. Task Type also is defaulted based on your configuration. You may change the effort if necessary.

8. Select appropriate Priority for your task.
9. Planned Effort defaults from selected Task Type. However, you may change the effort if necessary.
10. Planned Start Time defaults from the parent task. However, you may change the effort if necessary.
11. Planned End Time will be calculated from Planned Start Time and Planned Effort.
12. Tap Save icon to save the Follow Up task. Following business rules will come into play when you save a follow up task:
  1. Upon saving the task and if the task assignment status is "In Planning" (default based on your profile settings), a decision prompt "This task is currently not assigned to you. Do you want to continue? "will be displayed.
    - If you choose Yes, task will be uploaded to the server during the next sync (without having an assignee) and gets picked up by Dispatcher or Autonomous scheduler.
    - If you choose No, control stays back in Create Task screen.
  2. Upon saving the task and if the task assignment status is "Assigned" (field technician manually changes the status using status lov), a decision prompt "This task will be assigned to you. Do you want to continue? "Will be displayed.
    - If you choose Yes, task will be assigned to you.
    - If you choose No, the control stays back in Create Task screen.
13. Tap Back icon to go to previous task screen without saving the line.
14. You may delete the saved debrief lines by tapping Delete icon. Delete option is available in the Action menu. Delete is not allowed once the task is completed.

## Creating a New Service Request

MFS application offers the ability to create follow-up work orders in those situations when a technician recognizes additional work at customer site. As a field service technician, you can also create a new service request while you are at a customer site if you found a new issue that you need to work on.

Complete the following steps to create a new Service Request:

1. From the Spring Board, tap Customers icon. Customer Summary screen will be displayed.



2. Customer Summary Screen displays the list of customers which has open task assigned to the technician. Additional customer details can be viewed by tapping any one of the customer records. It displays following: Sites, Accounts, Customer Products, Service Request, Notes.
3. Tap one of the attribute. For example, tap Accounts and all accounts will be displayed inline.
4. Tap + icon to launch Create Service Request screen.

The screenshot displays the 'Create SR' screen with the following details:

- Customer:** Alliance Systems
- Account:** 1990 - Alliance Systems
- Owner Group:** (with a right arrow icon)
- \*Problem Summary:** Disk Backplane (Expansion)
- Address:** 101 East Arques Ave, SUNNYVALE, CA, 94085, US
- Status:** (partially visible)

5. Information such as Customer, Account, and Address is defaulted.

6. Additionally, Status, Severity, Urgency, and Service Request Type is defaulted based on your settings.
7. Enter Problem Summary (Mandatory).
8. Enter Item (Optional). You can also choose item using Search and Find icon.
9. Enter Instance Number (Optional). You can also choose item using Search and Find icon. Also, you can scan the instance number by tapping bar code scanner.
10. Enter Serial Number (Optional). You can also choose Serial Number using Search and Find icon. Also, you can scan the Serial Number by tapping bar code scanner.
11. Enter Purchase Order Number (optional).
12. Enter Problem Code (Optional).

The screenshot displays the 'Create SR' screen in a mobile application. The top navigation bar contains a 'Back' button on the left, the title 'Create SR' in the center, and a 'Save' button on the right. Below the navigation bar, there is a list of fields for creating a Service Request (SR). Each field is presented in a card-like format with a right-pointing arrow icon on the right side, indicating that the field is clickable and will likely open a selection menu. The fields and their current values are:

- Severity:** Low
- Urgency:** Respond - 24
- Purchase Order Number:** (Empty text input field)
- Type:** Break/Fix Repair
- Problem Code:** (Empty text input field)
- Resolution Code:** (Empty text input field)

- Flex field segments will be rendered in the screen if you enable Service Request level Flexfield.

The screenshot displays the 'Create SR' screen in a mobile application. At the top, there is a status bar with icons for airplane mode, Wi-Fi, VPN, and battery, along with the time '2:42 PM'. Below the status bar, the screen has a header with a 'Back' button on the left, the title 'Create SR' in the center, and a 'Save' button on the right. The main content area is divided into three sections: 'Resolution Summary' with an empty text input field; '\*CCC' with a text input field containing 'Fhg'; and 'KP SR Context' with a dropdown menu.

14. Tap Save icon to save the Service Request. Newly created Service Request will be displayed in the SR list screen.
15. Tap Back icon to navigate back to the previous screen without saving the line.

## Opening Service Requests

1. On the springboard, click on the Service Requests icon.
2. You will see the list of open service requests assigned to you.



12:49



## Open SRs

[Filter](#)

D... ▼

Customer ▲

Severity ▼

**71194**

**Low**

**P&A-Customer-1**

**Respond - 24**

100 DEEP CREAK, Cha...  
dimaag ka dahi

2021-04-27 05:18 PM  
Open

**70988**

**Low**

**Business World**

**Respond - 24**

2391 L Street, San Jose...  
MP\_SR1

2021-04-15 03:22 PM  
Open

**63182**

**Low**

**Computer Service and Re...**

**Respond - 24**

301 Summit Hill Drive, ...  
TASK

2014-05-16 11:30 AM  
Open

**62982**

**Low**

**AT&T Universal Card**

**Respond - 24**

5645 Main Street, Jack...  
task

2014-05-16 11:02 AM  
Open

**62782**

**Medium**

**Ace Communications**

**Respond - 24**

100 TELECOM PARKW...  
task

2014-05-16 10:06 AM  
Open

**62382**

**Low**

**Total Internet**

**Respond - 24**

3. Click on any record to view the details of the service request.

## Creating a New Task

After you create a new Service Request, you may proceed with task creation flow.

### Prerequisites

A new service request must be created or an existing service request must be selected from the SR list screen.

Complete the following steps to create task:

1. Navigate to the SR list screen by tapping one of the service request record.
2. Tap Action menu.
3. Tap Task from the menu. Create Task screen is launched.
4. Enter Name for the task.
5. Enter a brief Description for the task.
6. Default Status will be displayed. In general, implementers prefers to have is In Planning status. You may set your preferred status using the profile setup in the server.
7. Task Type also is defaulted based on your configuration. You may change the effort if necessary.
8. Select appropriate Priority for your task.
9. Planned Effort defaults from selected Task Type. However, you may change the effort if necessary.
10. Planned Start Time defaults from the parent task. However, you may change the effort if necessary.
11. Planned End Time will be calculated from Planned Start Time and Planned Effort.
12. The Resource\_ID and Type are picked from the values set for the profile options:
  1. Service: Default Service Request Task Owner
  2. Service: Default Service Request Task Owner type

If these profile options are not set, the values default to the current user resource ID/RS\_EMPLOYEE.

13. Tap Save icon to save the task. Following business rules will come into play when you save a task:
  - Upon saving the task and if the task assignment status is "In Planning" (default based on your profile settings), a decision prompt "This task is currently not assigned to you. Do you want to continue? "will be displayed.
    - If you choose Yes, task will be uploaded to the server during the next sync (without having an assignee) and gets picked up by Dispatcher or Autonomous scheduler.
    - If you choose No, control stays back in Create Task screen.
  - Upon saving the task and if the task assignment status is "Assigned" (field technician manually changes the status using status lov), a decision prompt "This task will be assigned to you. Do you want to continue? "Will be displayed.
    - If you choose Yes, task will be assigned to you.
    - If you choose No, the control stays back in Create Task screen.
14. Tap Back icon to go to previous task screen without saving the line.
15. You may delete the saved debrief lines by tapping Delete icon. Delete option is available in the Action menu. Delete is not allowed once the task is completed.

## Creating Personal Task

Many people like to keep work projects and personal projects separate — just as they might separate work email and personal email. With Personal Task, you can keep a distinction between work and personal while still having access to both types of tasks in one place, without having to sign in to multiple accounts, and manage your time more efficiently.

Additionally, Personal task feature allows you to block a time slot to notify the dispatcher that you will not be available for a particular period. A personal task cannot be dispatched or tied to any service request, therefore making it different from a field service task that is downloaded to your device. For example, if you need to go to the dentist next week, you may create personal task with the details for that period. By knowing your availability, the dispatcher can schedule the technicians more effectively.

Complete the following steps to create task:

1. Navigate to the Task List screen.
2. Tap Action menu.
3. Tap Personal Task from the menu. Personal Task screen is launched.



The screenshot shows a mobile application interface for creating a 'Personal Task'. At the top, there is a status bar with icons for airplane mode, Wi-Fi, VPN, and battery, along with the time 2:43 PM. Below the status bar is a header with a blue back arrow, the title 'Personal Task', and a blue 'Save' button. The form consists of several sections: a 'Name' field with a text input box; a 'Description' field with a larger text input box; a 'Status' field with the value 'Assigned' and a right-pointing arrow; a 'Type' field with the value 'Personal' and a right-pointing arrow; and a 'Priority' field with the value 'Medium' and a right-pointing arrow.

4. Enter Name for the task.
5. Enter a brief Description for the task.
6. Select Status from the Status lov. This field will be defaulted.
7. Select Task Type. This field will be defaulted.
8. Select Priority for the personal task. This field will be defaulted.
9. In the Effort field, enter the duration of the Personal Task. Effort will be defaulted

from the task setup ui.

10. Select Scheduled Start Date, Time, Scheduled End Date and Time using calendar widget.
11. Task location will be defaulted from your technician address. You may enter a new address using One-Time Address button.
12. Click Apply to save the personal task.
13. Tap Back icon to go to previous task screen without saving the line.

## Generating Field Service Report and Capturing Customer Signature

After capturing all the required details for the task, you may review your action summary using Field Service Report. Field Service Report provides a high level action summary that helps you to make sure that you have captured all required information before presenting to the report customer for a signature. Customer representative reviews and signs the report. Then you may generate a PDF (portable document format) report. You can print this report if you configured a printer (Wi-Fi/Bluetooth printers available in the market) or email the report to the customer.

Complete the following steps to view the report:

1. Navigate to Task Detail screen and tap Report menu present in the Task Details screen. Report screen displays your action summary.

✈️ 📶 VPN 2:37 PM 🔒 🔋

[← Back](#) **Report** [Print](#)

**SERVICE REPORT**

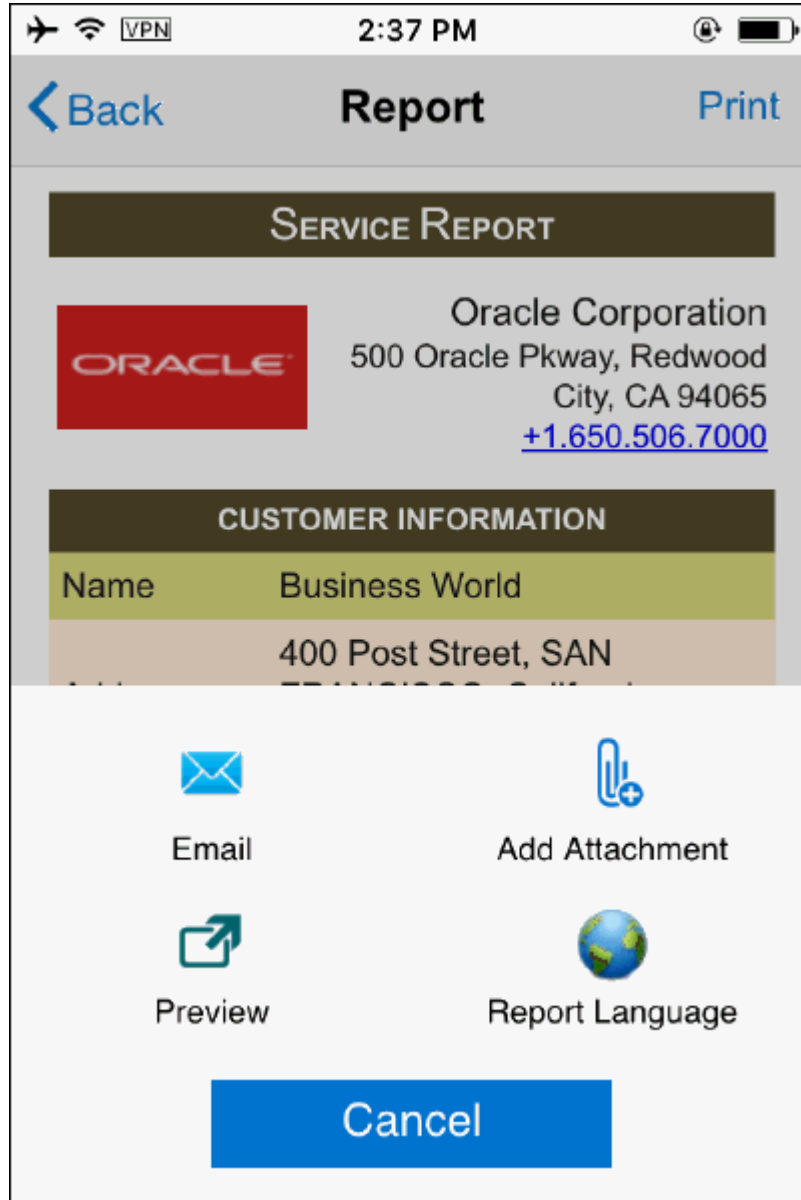


**Oracle Corporation**  
 500 Oracle Pkway, Redwood  
 City, CA 94065  
[+1.650.506.7000](tel:+16505067000)

**CUSTOMER INFORMATION**

Name	Business World
Address	400 Post Street, SAN FRANCISCO, California, 94100, US
Contact	Alec Stewart-Business World-22909
Phone	<a href="tel:18005558355">1 800 5558355</a>
Email	nobody@localhost
Service Request	726674

[Actions](#) ⬆️



2. You review the task summary and present the report to the customer to get their signature.
3. Final report shows action summary with the customer signature.



- If you install wireless printer, you can print the report right away.

#### Customize Your Report

You may customize the report based on your requirement. For example, you can change the Oracle logo displayed on the report to your preferred logo. Refer the MOS note 1924062.1 for more details on how to customize your report.

#### Closing the Task:

Task completion is next logical step in the case progression. Complete the following steps to return parts:

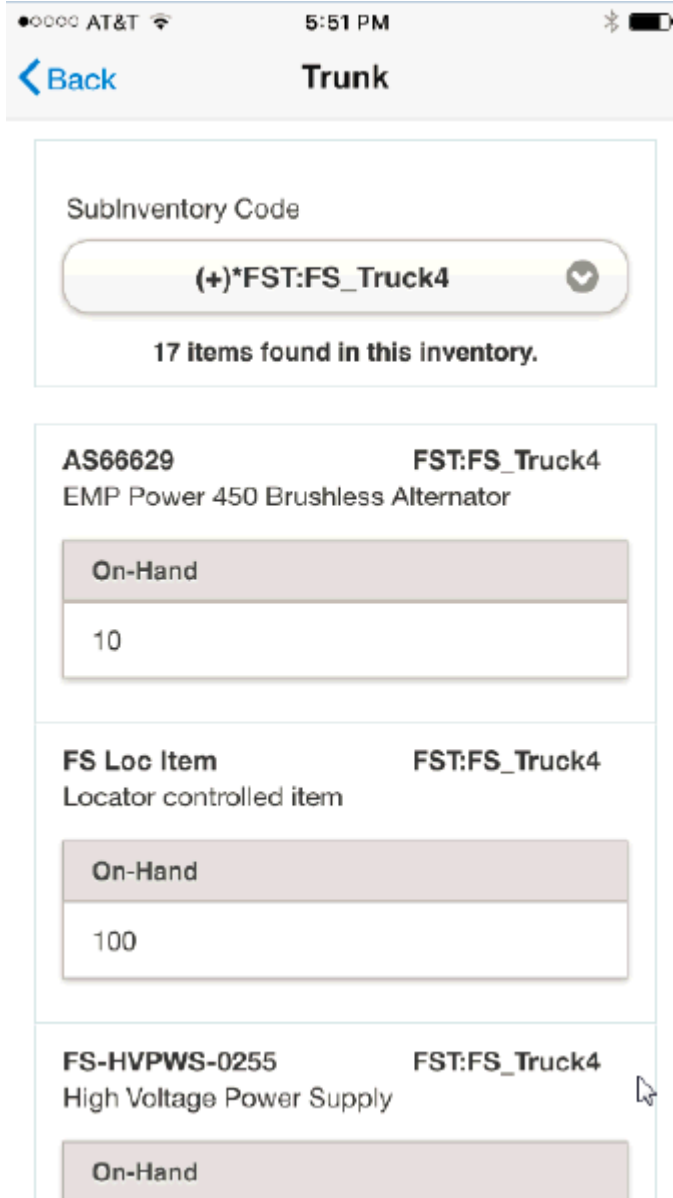
1. Navigate to Task Details screen by tapping appropriate task record from the Task list.
2. Once you finish all associated work, change the assignment status to "Completed" (or any custom status with completed flag enabled). This mark the task as completed.
3. During the next synchronization, server side posting program creates charge lines for this task.
4. After the successful completion of the task and creation of charge lines, task objects such as Labor, Material Install, Material Return, and Expense becomes read-only. However, you can create new debrief lines when the status is "Completed" (or any custom status with completed flag enabled).
5. You may change the status to "Closed" (or any custom status with closed flag enabled).

## Managing Trunk Stock

Trunk Stock feature allows you to view the inventory balances for every Sub inventory associated with you. Additionally, it shows available quantity and reservation (if any), Locator, Revision and Lot if those attributes are enabled.

Complete the following steps to view your truck stock:

1. Navigate to the spring board / Home page.
2. Tap Trunk menu to open the truck stock.



3. Items present in your default usable Subinventory will be displayed.
4. You may change the Subinventory using the lov if you want to see items present in other usable or defective Subinventory.
5. The other details displayed are:
  - Item Number
  - Item Description

- On-Hand

## Searching and Ordering Parts

Parts Search and Ordering is one of the key features which helps field technicians to make sure that the required parts are available in their Subinventory or being shipped directly to the customer site before they reach customer site. MFS application enables you to search and order parts in warehouses and Subinventories.

Parts search and Order feature consists of two-steps. First you locate the parts needed to fulfill your order, either through your sub-inventories, Coworker's sub-inventory, or a warehouse. Once you have located the parts, the next step would be to create parts requirement and an order.

### Prerequisites

The desired part must be defined as orderable in Oracle Inventory. Refer Spares Management user guide to learn more about how to setup shipping networks for your organization.

### Search Parts:

Complete the following steps to create parts requirement:

1. Navigate to the Task Details screen.
2. Tap Parts Search menu to launch Parts Search screen. Parts Search screen displays parts requirement if parts requirement and order already created for your task.
3. Tap Add Order button to launch Search (Parts Req) screen.



The screenshot shows the 'Search (Parts Req.)' screen in the Oracle Mobile Field Service Store and Forward app. The status bar at the top indicates the time is 2:44 PM, and there are icons for airplane mode, Wi-Fi, VPN, and battery. The screen has a light gray header with a blue back arrow and the text 'Search (Parts Req.)'. Below the header, there are several sections:

- Part Number and Quantity:** A text input field labeled '\* Part Number' with a search icon (magnifying glass) to its right. The quantity is set to '1' with a plus icon (+) to its right.
- Sub-Inventory:** A dropdown menu showing 'Sub-Inventory' and 'FST FS\_Truck4' with a right-pointing arrow icon.
- Need By:** A date and time selection area. The date is '2016-08-18' with a calendar icon, and the time is '02:44 PM' with a clock icon.
- Distance and UOM:** A text input field labeled 'Distance' with the value '0' and a right-pointing arrow icon. The unit of measure is 'UOM Mile'.
- Address Type:** A dropdown menu labeled 'Address Type' with a right-pointing arrow icon.

4. Enter a Part Number and tap Search and Find (flash icon). Part Number will be validated against server. You need to be connected to online.
5. Enter the required quantity.
6. You may use + (Plus) icon available in the screen to add more parts.
7. Your default usable Subinventory will be defaulted. However, you may change the default value using lov if you have more than one Subinventory.
8. Choose Need By (date and time) using Calendar widget.

9. Entering a distance (optional) helps to limit scope of your search.
10. Default UOM for the distance will be defaulted.
11. Address Type: You may choose one of the following address types for creating parts requirement. The options are:
  - Customer: You may choose appropriate customer address using drop down lov.
  - Third Party: Third party addresses are the common drop ship points where orders are shipped and technician can collect the shipment. Refer Spares management user guide to learn more about this topic.
  - Technician: You may choose Technician addresses using dropdown lov. The address lov displays all valid addresses defined in Spares Management.
  - Special: Free Form address format allows you to enter address based on country of your choice. Address segments will be rendered based on the selected country. You need to have connectivity in order enter Special Address.
  - Task: You can choose Task address using drop down lov.
12. Ship To will be populated based on the address type selection in the Address Type field.

Address Type  
 Technician

\*Ship to  
 2200 Waverly Ave, SAN JOSE, CA,  
 95122, US

Spares Requirement Lines

My Inventory:     Include Closed:   
 Co Worker:     Alternate:   
 Manned:     Use Excess:   
 Unmanned:

Search      Save

13. Source region allows you to select one more sourcing option. You can set the following search parameters:
- My Inventory: This should be checked if you want to search your Sub inventory assigned to you.
  - Co Worker: This should be checked if you want to search other technician's Sub inventories.
  - Manned: This should be checked if you want to include manned warehouses that are open based on the calendar assigned in the Site Attributes tab of the

Planner's Desktop.

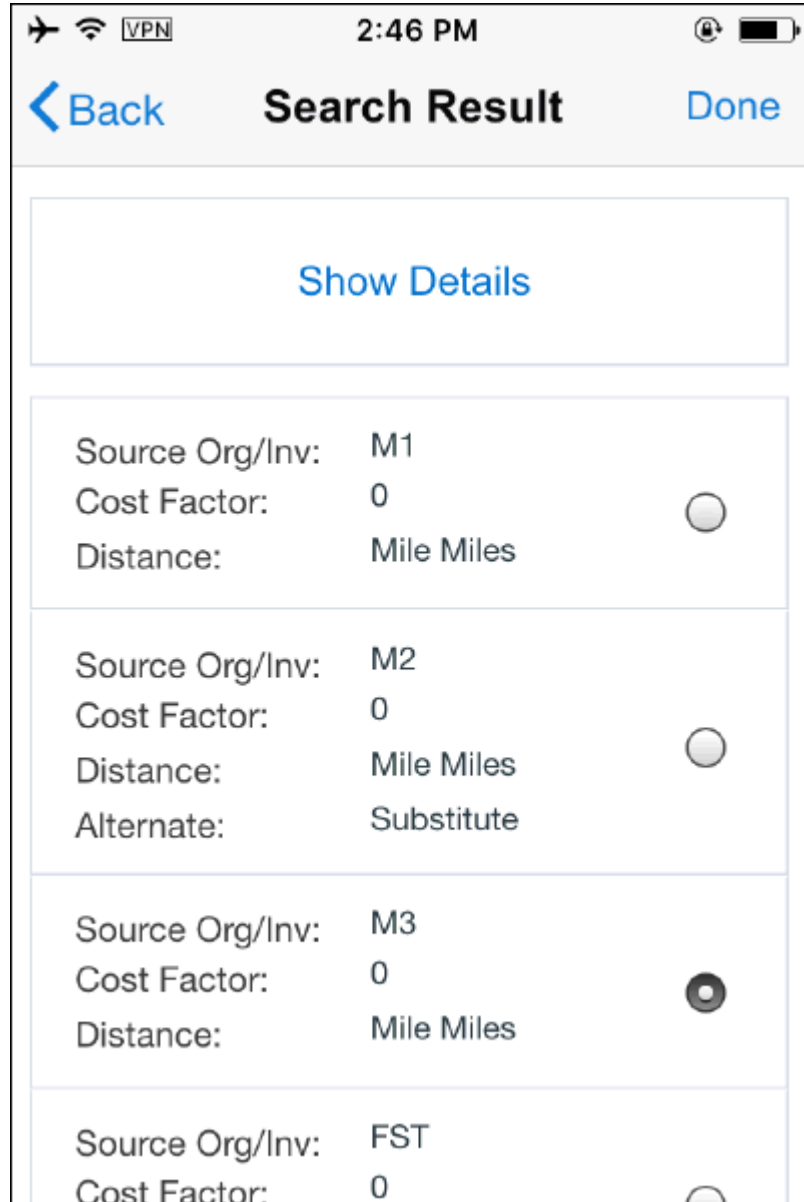
- Unmanned Warehouse: This should be checked to include search parts from unmanned warehouses in your parts search.
- Include Closed: This should be checked to include closed Warehouses in your parts search.
- Alternate: This should be checked to include parts supersession and substitutes in your parts search.
- User Excess: This should be checked to include parts from the excess list in your parts search.
- Tap Search button to initiate search. Make sure that you have connectivity.
- Refer next section to learn how to create Parts Requirement.

**Additional Information:** Refer Spares Parts Search: Business Logic and Required Setups for Enhanced Functionality in 12.1.3+ (Doc ID 1396161.1)

### **Creating Parts Requirement and Parts Order:**

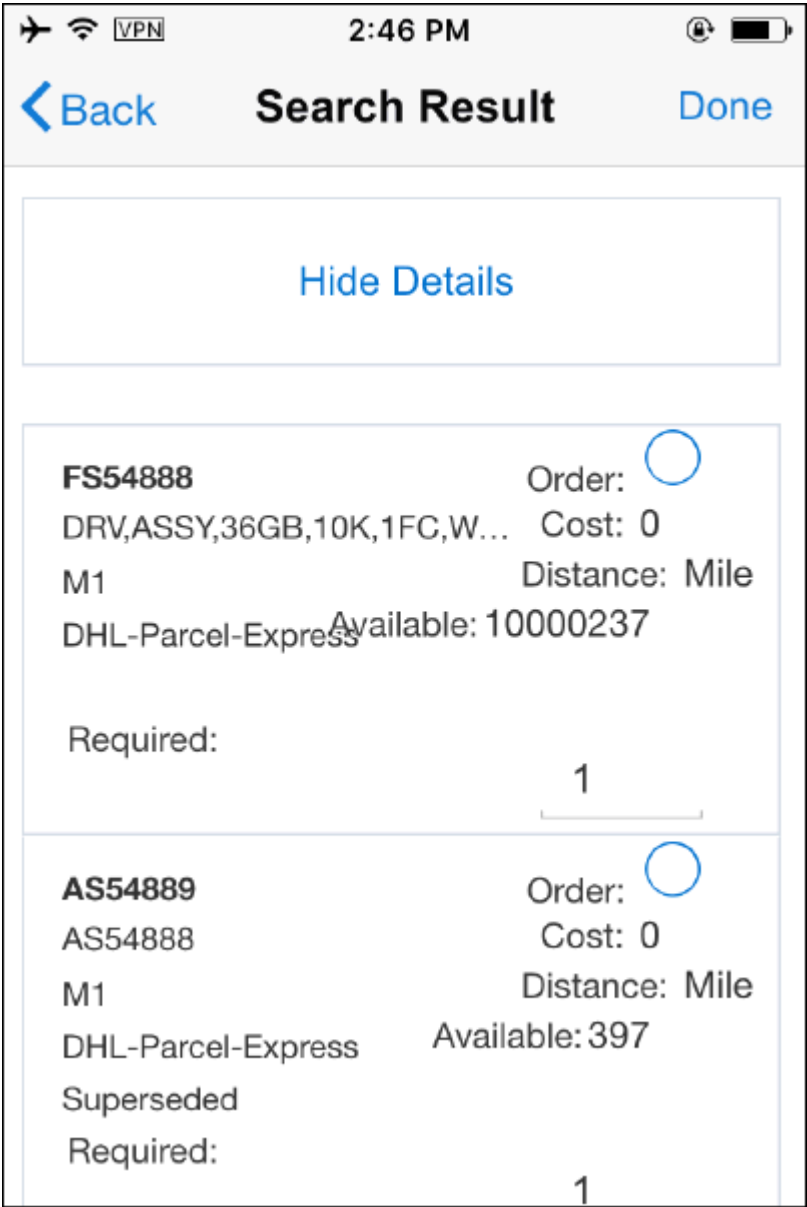
Complete the following steps to create parts requirement:

1. Tapping Search button (mentioned in the previous section) will initiate the parts search and the results will be displayed sorted in ascending order based on cost.

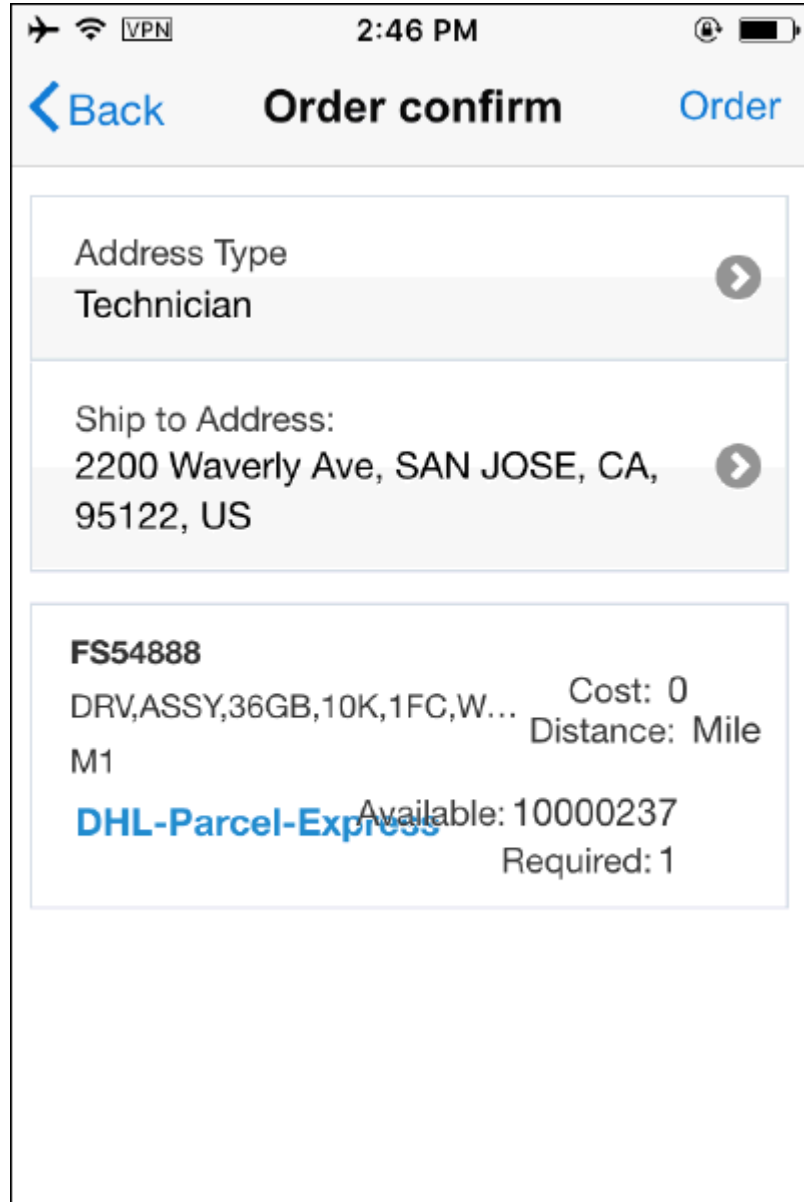


2. Each row consist of Sourcing organization, Cost factor, and the Distance (distance will be calculated between your current location and the warehouse address).
3. The radio button allows you to choose the appropriate source organization. System provides a recommendation (winner) and the radio button will be checked for this recommendation.
4. You can accept the recommendation or you may pick other sourcing option from the list by checking the appropriate source.
5. Show Details/Hide Details button toggles between short list and long list. If you tap

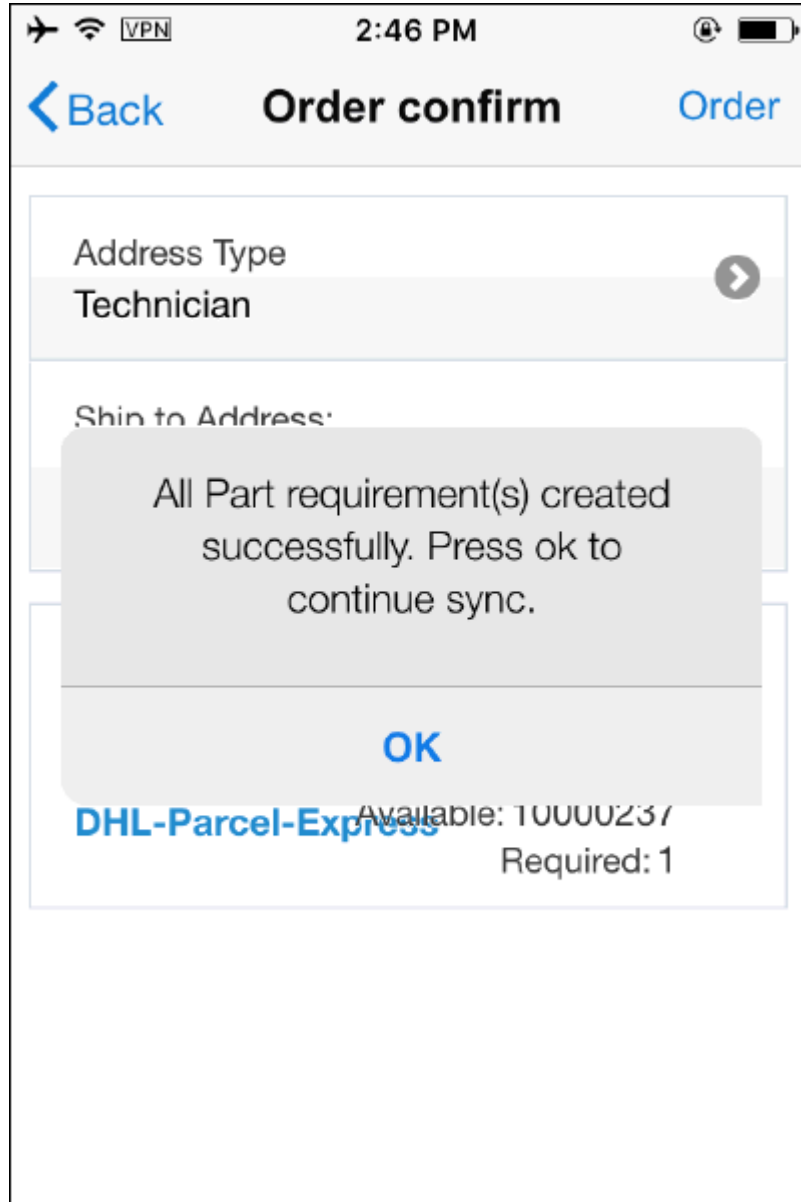
Show Details, long list will be displayed and it allows you to pick and choose part and quantity from various source organizations if there isn't enough quantity in one organization.



6. You may tap Done button and the Order Confirm screen will be launched.
7. Order Confirm screen display your order summary.



8. Once you verify you order details, you may tap Order button. This initiate Parts Requirement creation.
9. You will get a confirmation message if the parts requirement is successfully created.



10. Newly created Parts Requirement will be uploaded immediately to the server and a Parts Order creation flow will be initiated at the server.

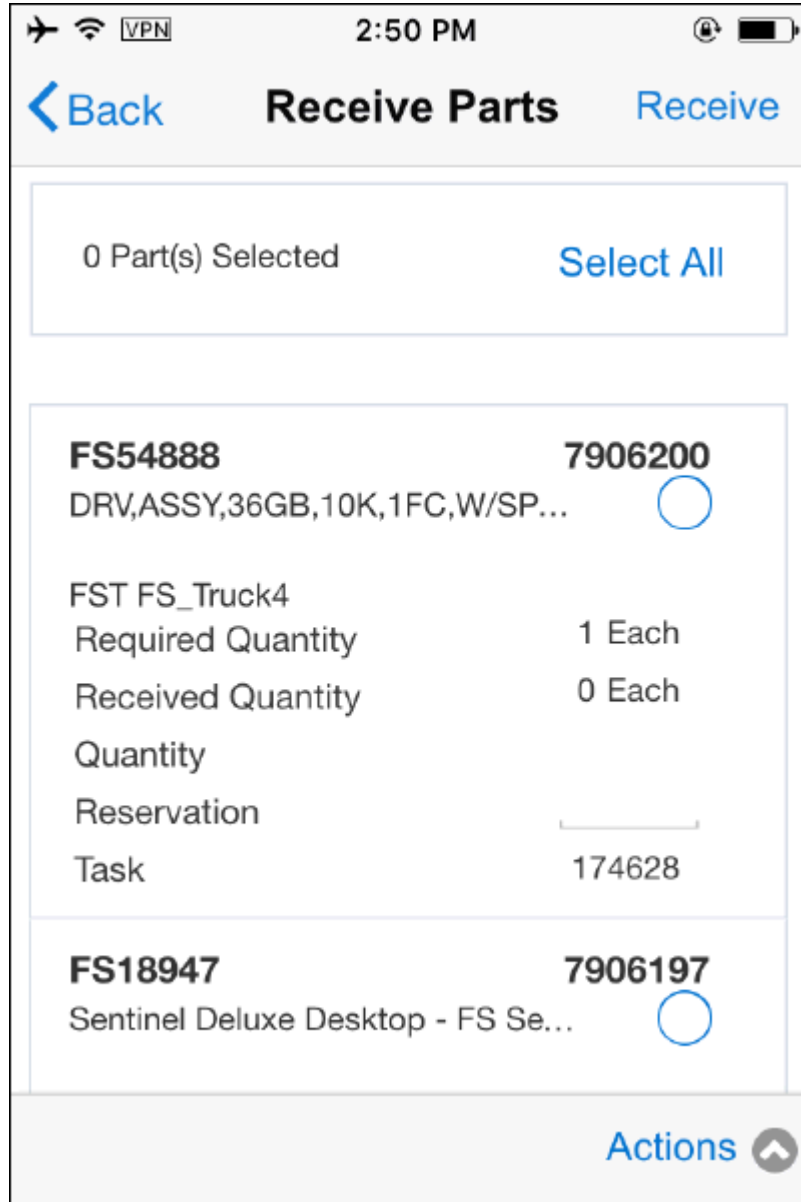
## Receiving Parts

Once parts order Entered, Booked, and Shipped from the respective warehouse, order will be eligible to receive and the details will be downloaded to the client. You initiate the receiving process in the Task screen.

Complete the following steps to create parts requirement:



1. Navigate to the Task screen and tap Receive Parts menu.
2. Receive Parts displays the following information:
  - Task Number
  - Item Number
  - Item Description
  - Order Number
  - Required Quantity
  - Received Quantity
  - Reserved Quantity
  - Locator



3. You may check the box to select all quantity if you prefer to receive all orders at once. If you want to receive partial order, you may enter quantity in the quantity box.
4. Tap Receive to initiate the receipt process.
5. Back button allows you to navigate back to Task Details screen.

## Synchronizing with Enterprise Server

Synchronization is the key component of the MFS application. Synchronization allows technicians to download new data that has been assigned to technicians such as new tasks assignments, parts requirements, and attachments.etc from the enterprise server. Also, it uploads the changes such as; new debrief lines and updating task statuses back to the enterprise server. There are two modes of synchronization: Manual and Automatic.

### **Manual Synchronization:**

This mode allows you to synchronize your device with the enterprise system when you tap the sync button present in the Actions mention available in every screen.

The screenshot shows a mobile application interface for 'Mobile Field Service'. At the top, there is a status bar with icons for airplane mode, Wi-Fi, VPN, and battery, along with the time '2:51 PM'. Below the status bar is a navigation bar with a back arrow, the text 'Mobile Field Service', and a 'History' link. The main content area is divided into several sections: 1. A field labeled '\*User Name' containing the text 'PDESMOND'. 2. A field labeled '\*Password' containing seven black dots. 3. A field labeled '\*Server' containing the text 'Rws60145rems.us.oracle.co' and a blue padlock icon. 4. A section titled 'Complete Refresh' with a toggle switch currently in the 'Off' position. At the bottom of the screen is a blue 'Sync' button.

Complete the following steps to launch and synchronize MFS application after the installation:

1. Navigate to Home, and then tap Sync. The Sync screen is displayed. Additionally, you can access the Sync screen from Actions menu present in every screen.
2. Enter a valid User Name. Refer the implementation guide to learn how to create a Mobile Users.
3. Enter Password.
4. Enter Server details. Make sure you are logged into VPN if required.

5. If you are using Secured Socket Layer type of authentication (SSL), you should tap on the lock icon.
6. You can enable or disable the Complete Refresh option. By default, this is turned off. After the initial synchronization, application always does an incremental synchronization. You shouldn't change this setting unless advised because data on mobile device will be refreshed with the current data on server after the pending updates from mobile device (if any) are uploaded.
7. Tap Sync to initiate sync.

### **Automatic Synchronization (Pull):**

This allows application to synchronize automatically with the enterprise system without any manual intervention. It requires the application to be running either in foreground ie on the mobile device's screen or in background. If the application is stopped then automatic synchronization happens the next time user logs into the app.

Refer the implementation guide to learn more details about the Automatic Synchronization. Follow the steps to configure Automatic Sync after the installation.

You may set the following profiles at user, Responsibility, Application or at Site level.

1. CSM: Enable Auto Sync. This profile should be set to "Yes".
2. CSM: Automatic Synchronization Interval for Data Upload. You may set this profile to 0 or any positive integer.

If you set the profile to Zero, Synchronization becomes instantaneous. In this case, any data change in the client triggers an immediate sync.

If you set the profile to a positive integer, Synchronization becomes interval based. In this case, synchronization will be initiated at the interval specified in minutes.

Preference Screen (present in the client) displays the settings accordingly (refer the figure).

- If the profile CSM: Enable Auto Sync is turned off, Auto Sync setting in the device will be disabled.
- If the profile CSM: Enable Auto Sync is turn on and the profile CSM: Automatic Synchronization Interval for Data Upload is set to zero (instantaneous), the Auto Sync setting in the device will be enabled and displays additional information such as Auto Sync Mode and Auto Sync Error Alert (Minutes).
- If the profile CSM: Enable Auto Sync is turn on and the profile CSM: Automatic Synchronization Interval for Data Upload is set to a positive integer (interval), the Auto Sync setting in the device will be enabled and display additional options such as Auto Sync Mode and Auto Sync Error Alert (Minutes).

### **Viewing Synchronization History:**

1. After the synchronization is complete, you can view the details from the Sync History screen. This screen displays the following details: Sync Type, Session ID, Start Date, End Date, Refreshed, and Status.

## **Using Descriptive Flexfields**

Descriptive Flexfields can be used to display and capture additional information. Currently, MFS application supports Descriptive Flexfields at various levels including:

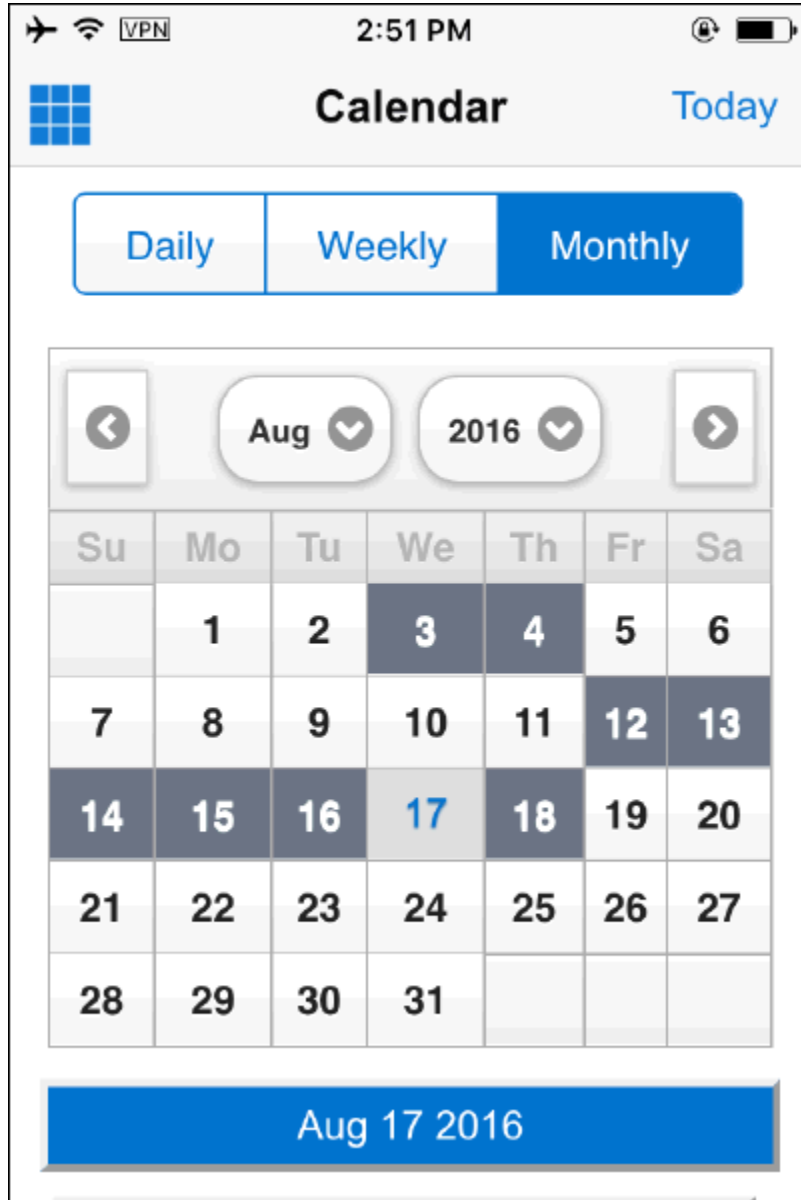
- Service Request
- Task
- Debrief lines
- Customer

Table-validated Flexfields are not supported by MFS applications. The Flexfields are downloaded and displayed in the MFS application after synchronization.

Refer Oracle Mobile Field Service Implementation guide to learn more about how to set up descriptive Flexfields.

## **Using the Calendar**

Oracle Mobile Field service integrates with the calendar application on smartphones to retrieve task related information for field service personnel.



This integration ensures that all task information is stored locally in read only format and is accessible even when there is no coverage in the area. This will allow the technician to always know where the next task is, when it is scheduled and what the work is about. It also helps them to identify any empty slot during the working hours for a day and put missing information into the system as well as create time entries.

### Prerequisites

- Users must have Android or iPhone/iPad devices with native calendar application which supports iCalendar. iCalendar is a file format which enables computer applications to send Calendar Event and Task details over internet.

- ❑ Android users must register the iCalendar URL at Google Calendar. Users therefore must have a valid Google Calendar account in order to register the iCalendar URL.

**To use the Calendar tool to view tasks and events:**

1. Register the iCalendar url on your device.
  - In IOS devices, navigate to the Preferences UI and click on the iCalendar link to register the phone/tablet.
  - For android devices, user must copy the link and register it on the Google Calendar manually.
2. Sync the device to fetch all the task details.
3. Users can use the calendar to do the following:
  - display future Field Service Tasks on device calendar application based on scheduled start and end dates
  - display past Field Service Tasks on device calendar application based on actual start and end dates
  - display future and past personal tasks on device calendar application based on schedule start and end dates
  - navigate to the Mobile Field Service Wireless application's Task detail UI from the calendar details screen when there is network connectivity
  - set reminder alerts on the calendar events using Field Service Alerts and Notification feature. Notification is enabled for new task assignment, schedule start/end time updates, as well as cancellation of assignment.

**Additional Information:** - The 'Field Service Alerts and Notification' feature must be enabled in order to get notifications from the device calendar application

- on IOS devices only:
  - if the task's service request has customer contact information, an event attachment of VCF format is linked to the event which the users can download on their device
  - users are notified when it is time to start travel based on the event start time, distance between event location and user's current location and time needed to reach the location. For example, if user is at location A and the



event is scheduled at 9am at location B, and the travel time to reach location B from A is 30 minutes, then the device will show a notification at 8.30 am. In android devices, reminder time is added for the event based on the Google Calendar settings.



---

## Oracle Mobile Field Service (S&F) Multiplatform - Tablet Edition

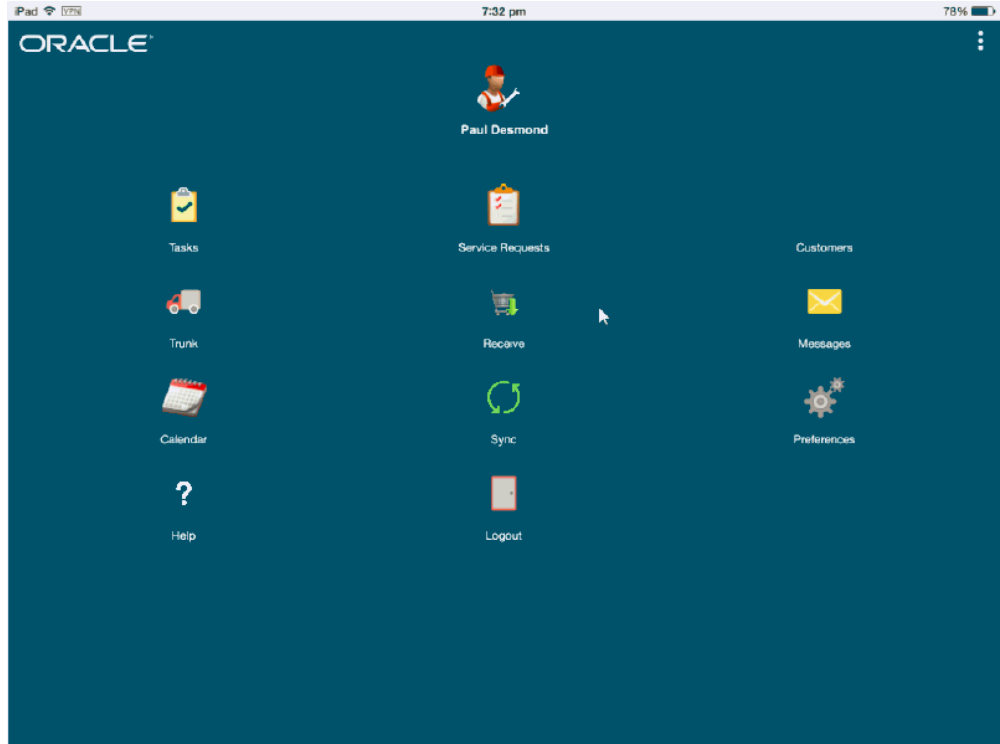
### Introduction

This section highlights the navigation and user interaction on the tablet edition of the Mobile Field Service S&F Multiplatform application.

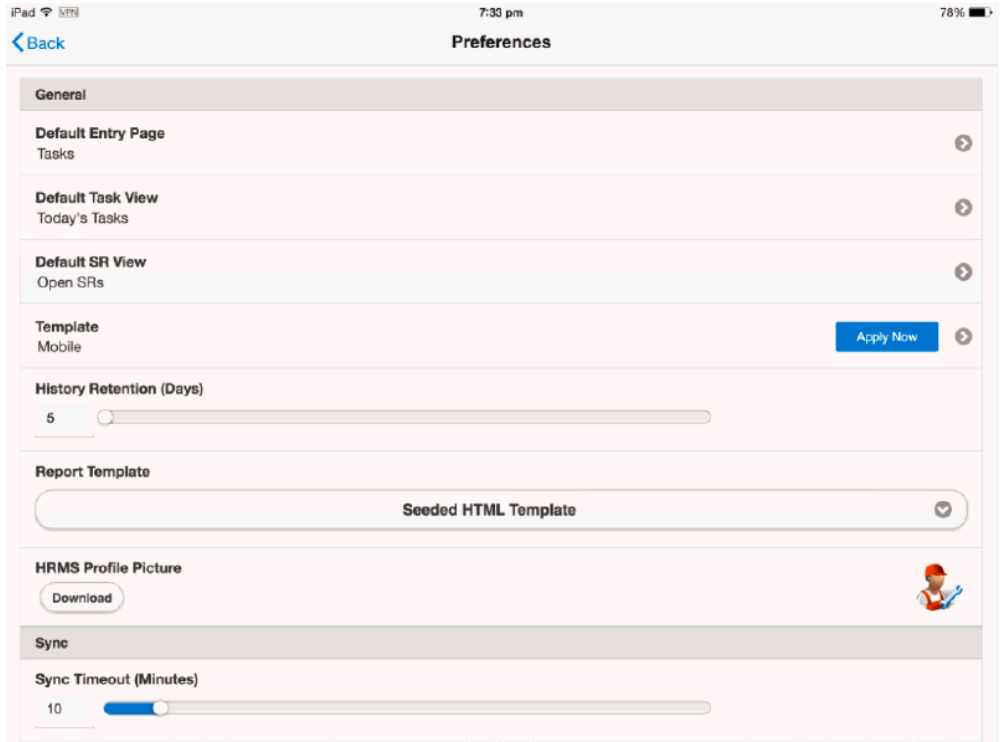
### Using the Technician Dashboard on the Multiplatform Tablet

#### To perform task related activities:

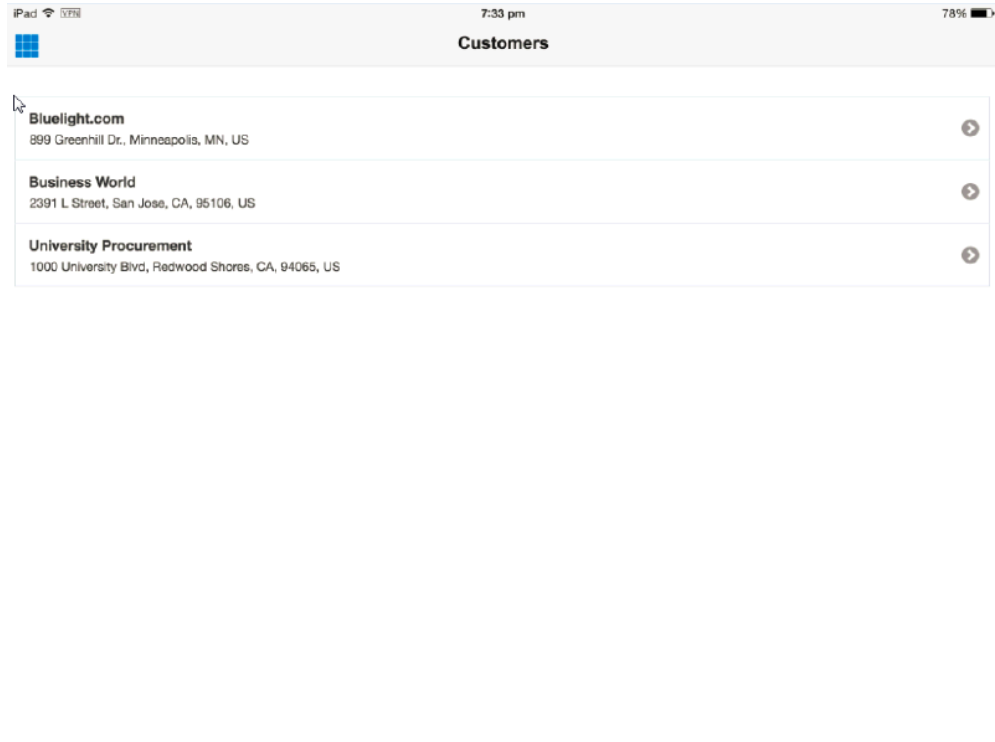
1. Login to the application. The Home screen is displayed.



2. Tap on Preferences to set default task views or set the entry page to any one of the following: Task Details and Home Page.



3. Tap on Customers to view the list of customers for the field service technician.



4. Field service technicians can select a customer record and create a service request for the same..

iPad 7:44 pm 76%

[Back](#) **Create SR** [Save](#)

Customer <b>Bluelight.com</b>
Account <b>1658 -</b>
Owner Group <span>➤</span>
*Problem Summary <hr/>
Address <b>524 San Bruno Avenue, Brisbane, CA, 94005, US</b>
Status <b>Open</b> <span>➤</span>
Item <span>🔍</span>
Instance Number <span>🔍</span> <span>📊</span>
Serial Number <span>🔍</span> <span>📊</span>
Severity <b>Low</b> <span>➤</span>
Urgency <b>Respond - 24</b> <span>➤</span>
Purchase Order Number <hr/>

- All open service requests can be viewed by tapping on the Service Requests icon on the Home screen.

iPad 7:33 pm 78%

**Open SRs** [Filter](#)

D... Customer Severity

<b>66840</b> <b>Business World</b> 400 Post Street, San Francisco, CA, 94100, US WIN Laptop	<b>Low</b> <b>Respond - 24</b> 2016-08-16 03:25 PM Open
<b>44788</b> <b>Bluelight.com</b> 524 San Bruno Avenue, Brisbane, CA, 94005, US Installation Request	<b>Low</b> <b>Respond - 24</b> 2017-08-20 07:08 PM Open
<b>44780</b> <b>University Procurement</b> 1000 University Blvd., Maintenance and Operations, Redwood Shores, C... Hardware issues	<b>Low</b> <b>Respond - 24</b> 2007-08-20 06:52 PM Open
<b>25354</b> <b>Business World</b> 2391 L Street, San Jose, CA, 95106, US Inspect and replace damage unit	<b>Low</b> <b>Respond - 24</b> 2005-06-08 09:05 PM Resolution In Progress

- To access the task list, tap on the Tasks icon in the Home page. The task list is displayed.



iPad 7:31 pm 78%

**Open Tasks** [Filter](#)

Date Customer Status

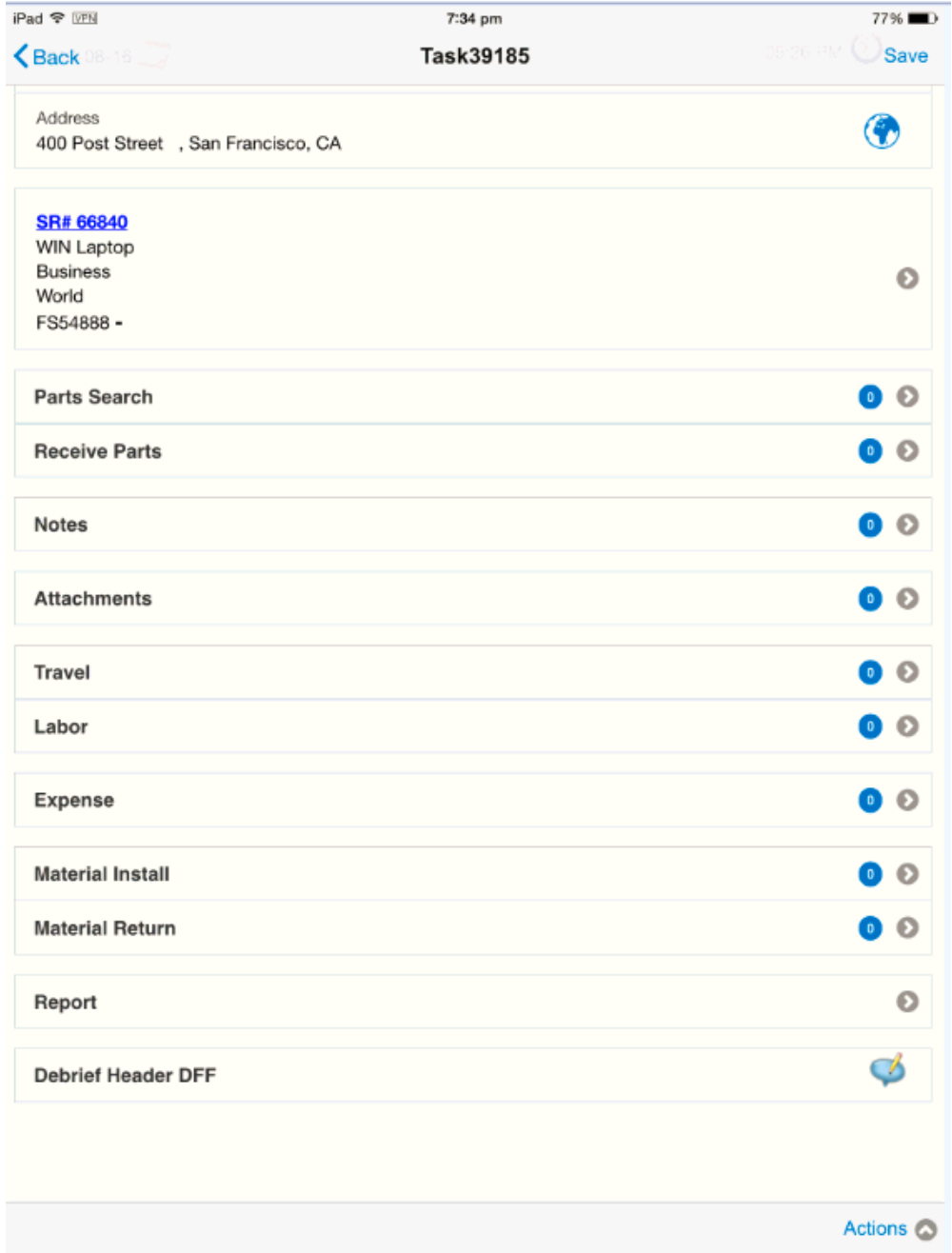
<b>39185</b> <b>Business World</b> 400 Post Street , San Francisco, CA WIN Laptop Task	<b>Accepted</b> <b>66840</b> 2016-08-16 03:26 PM 2 Hour
<b>35098</b> <b>University Procurement</b> 1000 University Blvd., Maintenance and Operations , Redwood Shores, CA Installation Checkup	<b>Accepted</b> <b>44780</b> 2007-08-21 04:30 AM 1 Hour
<b>35090</b> <b>Bluelight.com</b> 524 San Bruno Avenue , Brisbane, CA Installation Request	<b>Working</b> <b>44788</b> 2007-08-21 03:07 AM 1 Hour
<b>24457</b> <b>Business World</b> 2391 L Street , San Jose, CA Assign technician with knowledge in French and with part FS99108	<b>Approved</b> <b>25354</b> 2005-06-29 10:30 PM 2 Hour

[Actions](#)

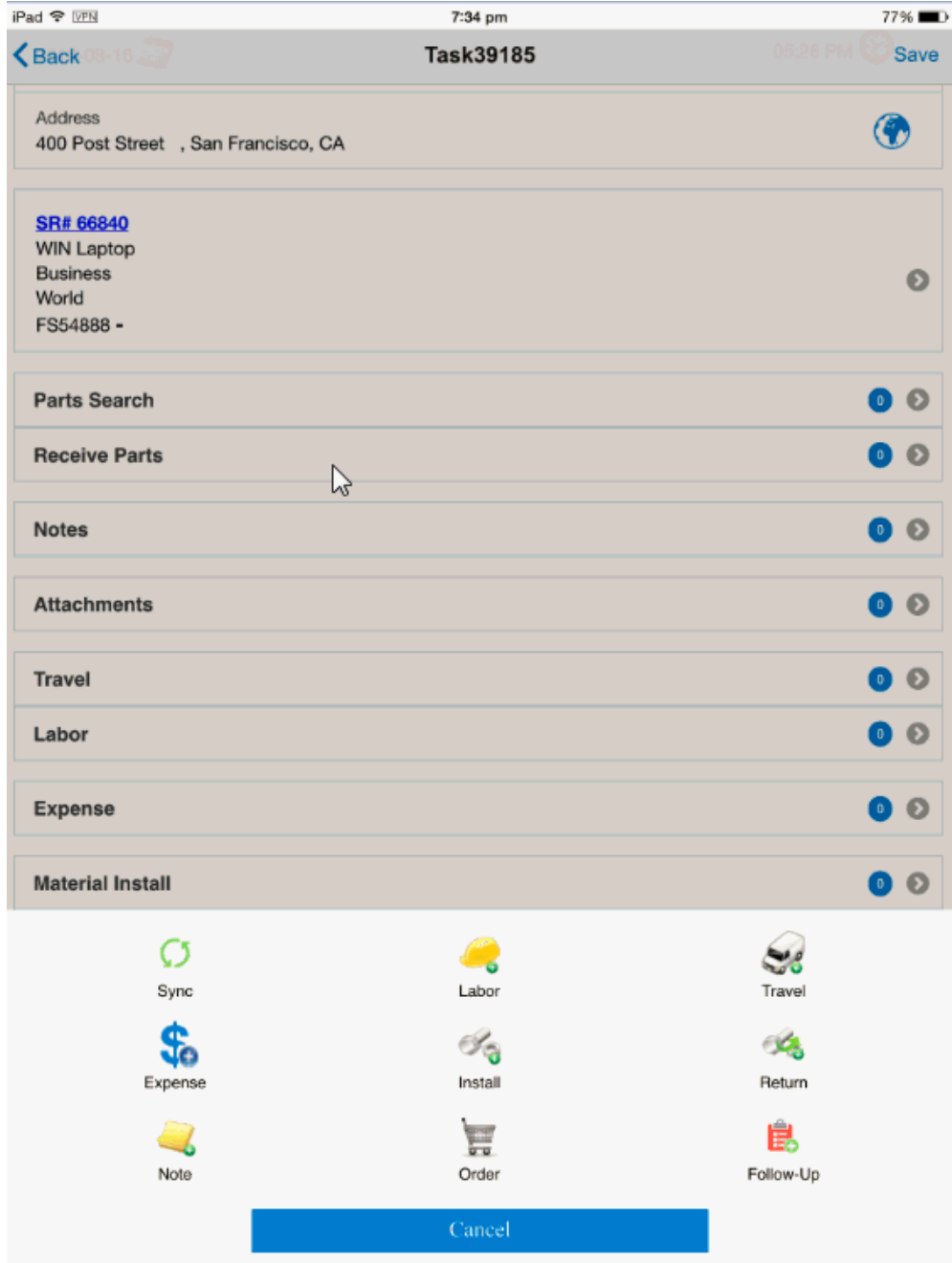
- Click on the task to display the task details.

Status	Accepted	
Subject	WIN Laptop Task	
Description	WIN Laptop Task	
Priority	High	
Effort	2	UOM Hour
Scheduled Start Time	2016-08-16	03:26 PM
Scheduled End Time	2016-08-16	05:26 PM
Address	400 Post Street , San Francisco, CA	
SR#	66840	
Business	WIN Laptop Business World	
FS#	FS54888 -	
Parts Search	0	
Receive Parts	0	
Notes		

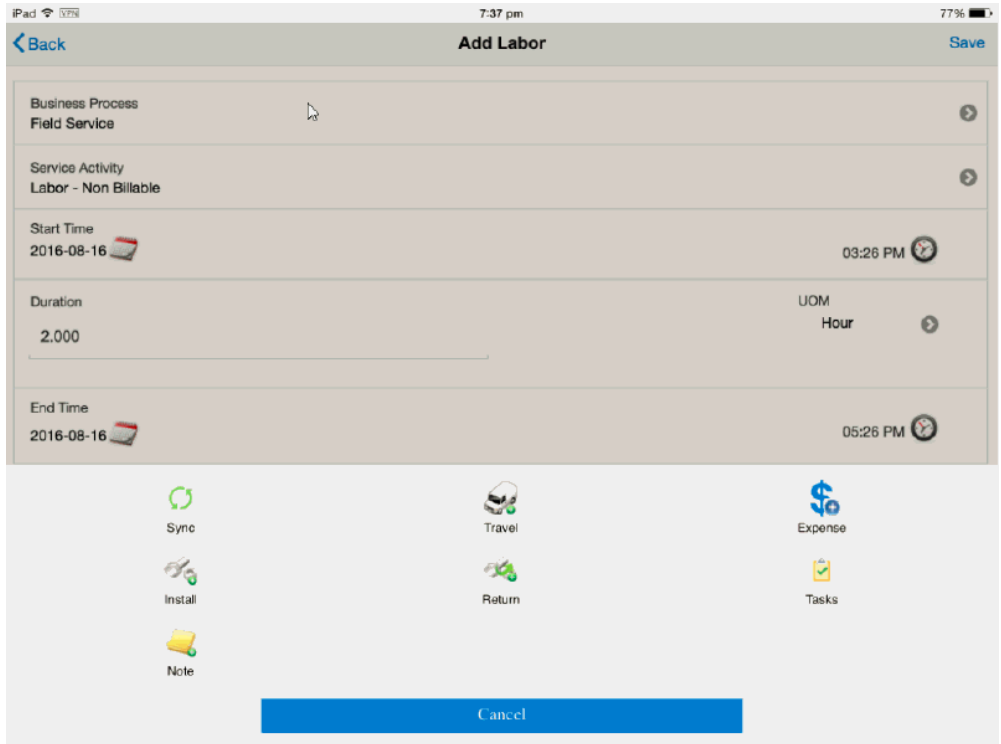
Actions



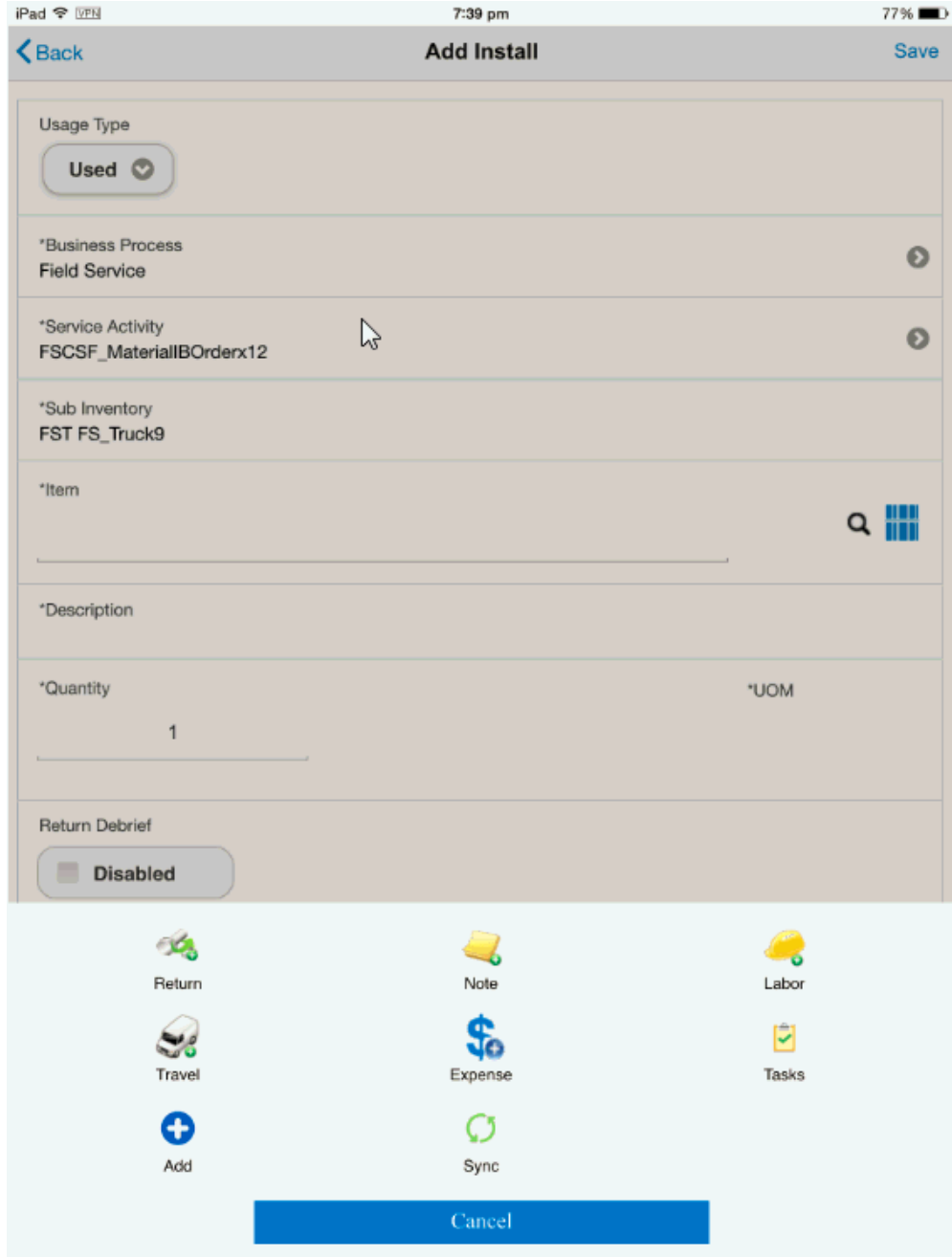
8. Tap on the Actions menu to display the options available to the field service technician.



9. To add labour debrief, tap on the Labor icon.



10. Click on Install to create install debrief for the task.



11. Tap on Return to access the Add Return screen and create a material return for the task.

iPad 7:39 pm 77%

[Back](#) **Add Return** [Save](#)

\*Business Process  
**Field Service**

\*Service Activity  
**Return**

\*Sub Inventory  
**D2 DF Truck9**

\*Item

Description

\*Quantity  \*UOM

Instance

Serial Number

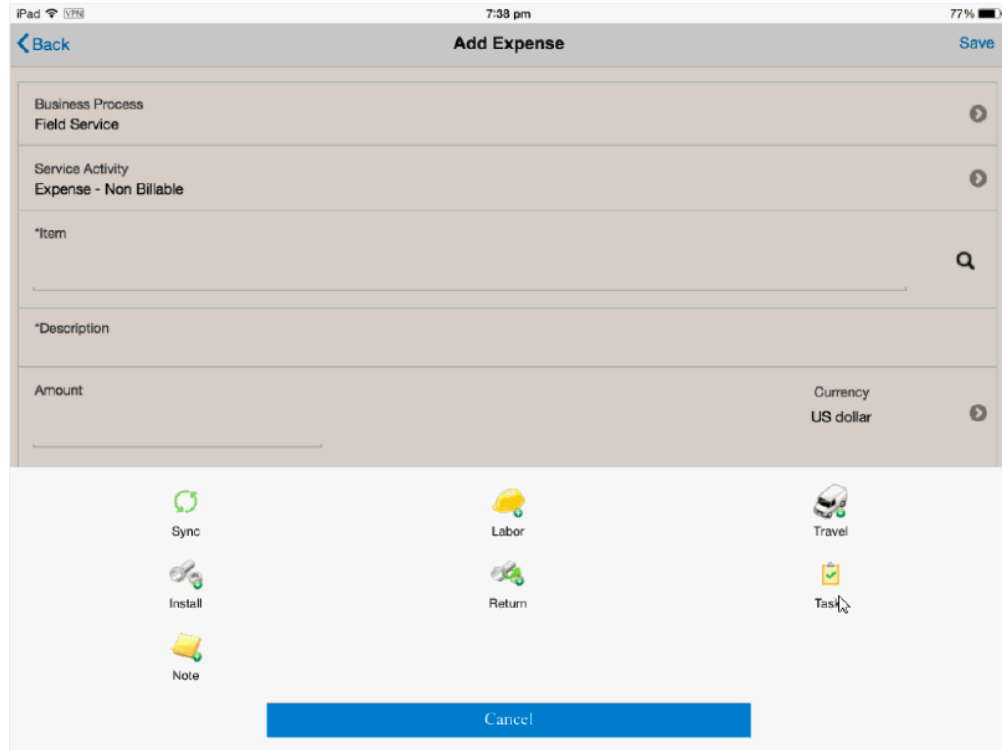
\*Return Reason  
**Accounts Receivables Billing Error**

Justification

\*Service Date  
**2016-08-23** 07:39 PM

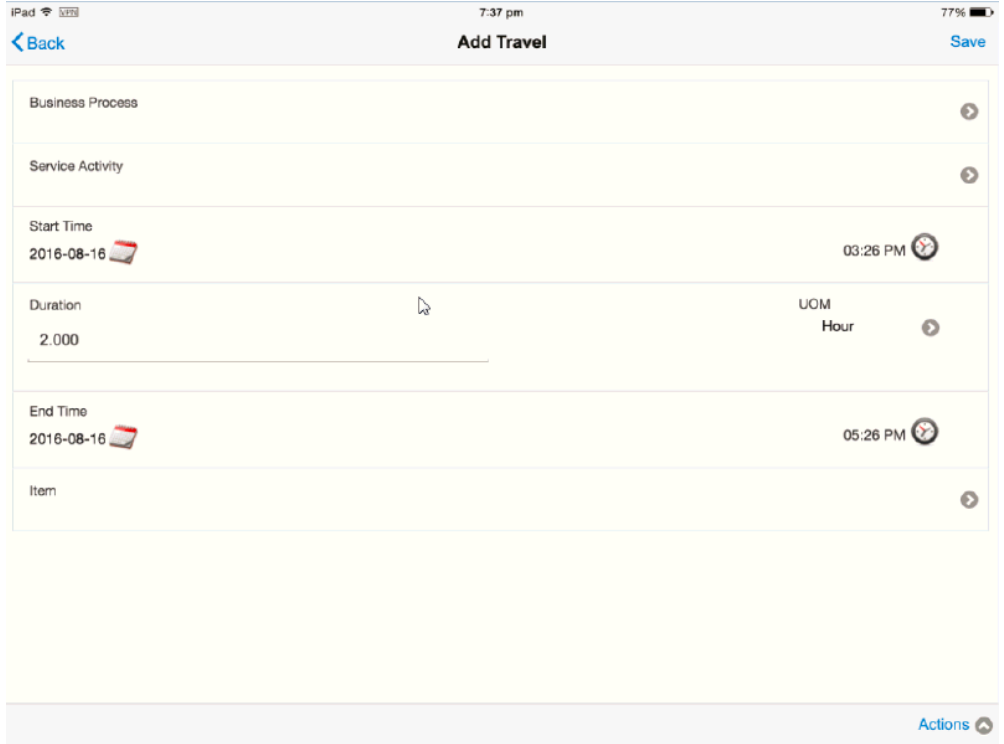
[Actions](#)

12. To add expense debrief, tap on the Expense icon.



13. Tap on the Travel icon to add a travel line to an existing task.





14. Tap on the Order icon to access the search page to query for parts and place a parts request.

[Back](#) Search (Parts Req.)

* Part Number	Quantity
<input type="text" value="Part Number"/>	<input type="text" value="1"/>
Sub-Inventory FST FS_Truck9	
Need By 2016-08-24	07:34 PM
Distance <input type="text" value="0"/>	UOM Mile
Address Type Task	
*Ship to	
Spares Requirement Lines	
My Inventory: <input checked="" type="checkbox"/>	Include Closed: <input checked="" type="checkbox"/>
Co Worker: <input checked="" type="checkbox"/>	Alternate: <input checked="" type="checkbox"/>
Manned: <input checked="" type="checkbox"/>	Use Excess: <input type="checkbox"/>
Unmanned: <input checked="" type="checkbox"/>	
<a href="#">Search</a> <a href="#">Save</a>	

[Hide Details](#)

**FS92689**

Envoy Standard Laptop - FS Series

M1

DHL-Parcel-Express

Substitute

Required:

Order:

Cost: 0

Distance: Mile

Available: 103

1

**FS54888**

Sentinel Standard Desktop - FS Series

M1

DHL-Parcel-Express

Required:

Order:

Cost: 0

Distance: Mile

Available: 203

1

**FS54888**

Sentinel Standard Desktop - FS Series

FST FS\_Truck6

Required:

Order:

Cost: 0

Distance: Mile

Available: 99

1

**FS92689**

Envoy Standard Laptop - FS Series

FST FS\_Truck1

Substitute

Required:

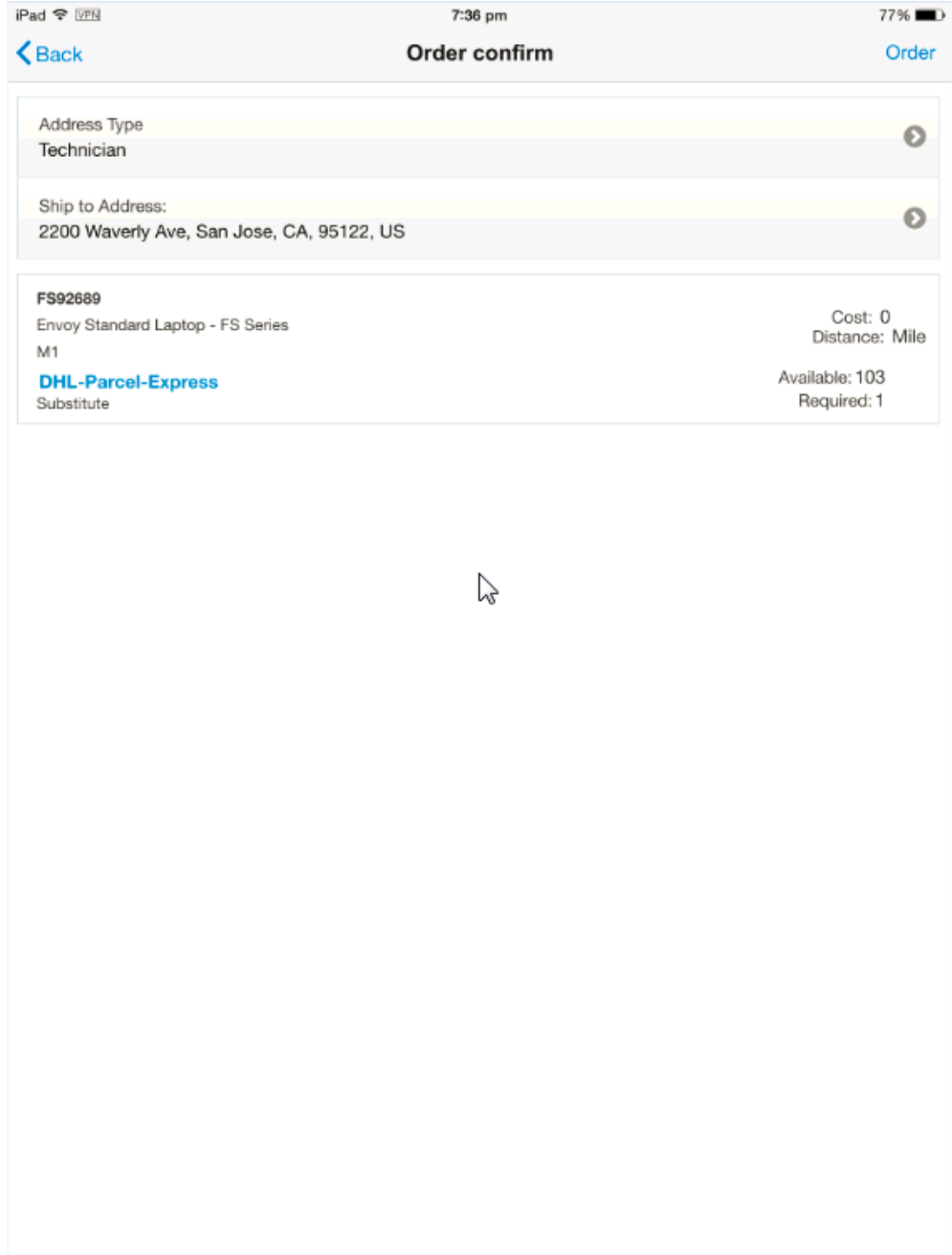
Order:

Cost: 0

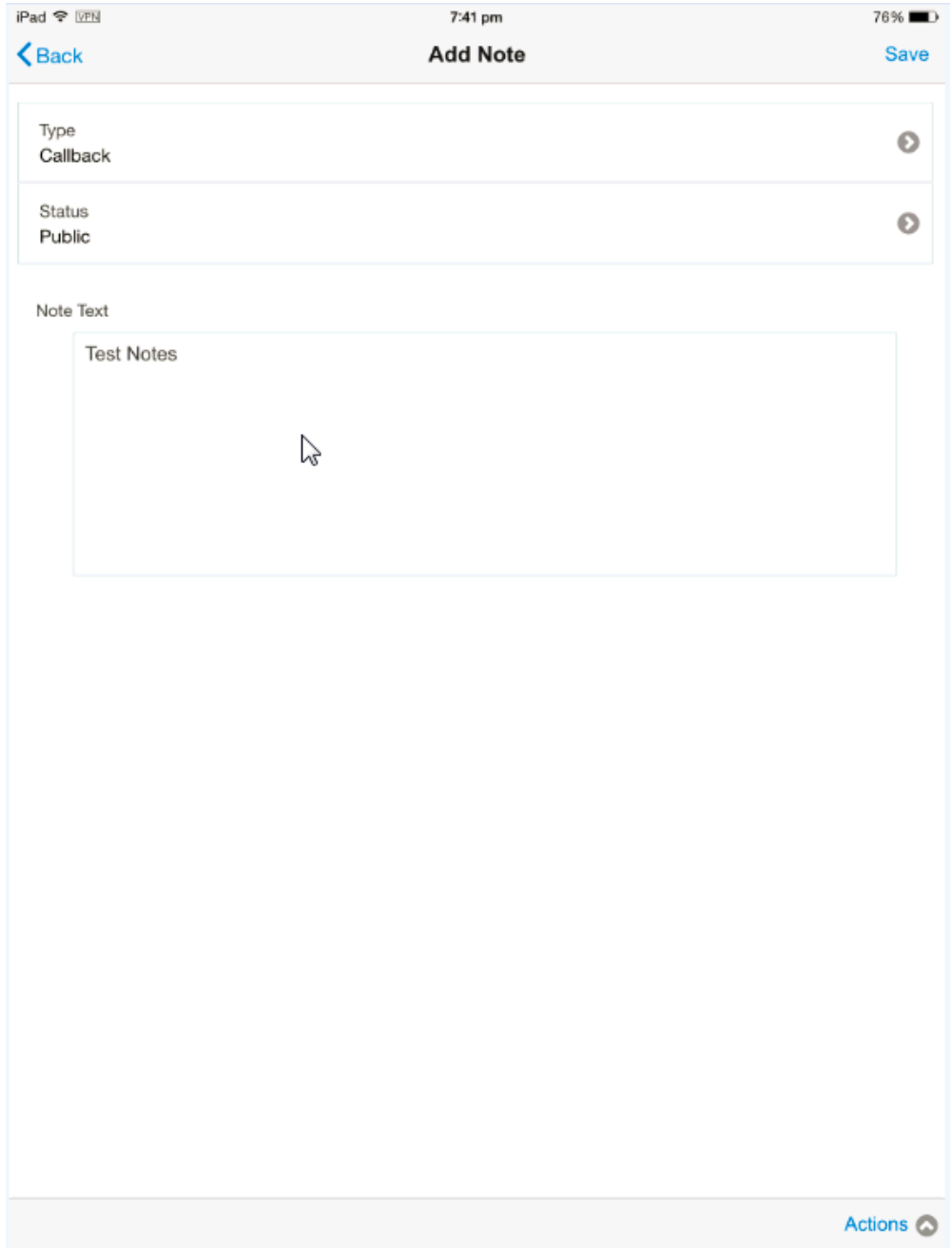
Distance: Mile

Available: 10

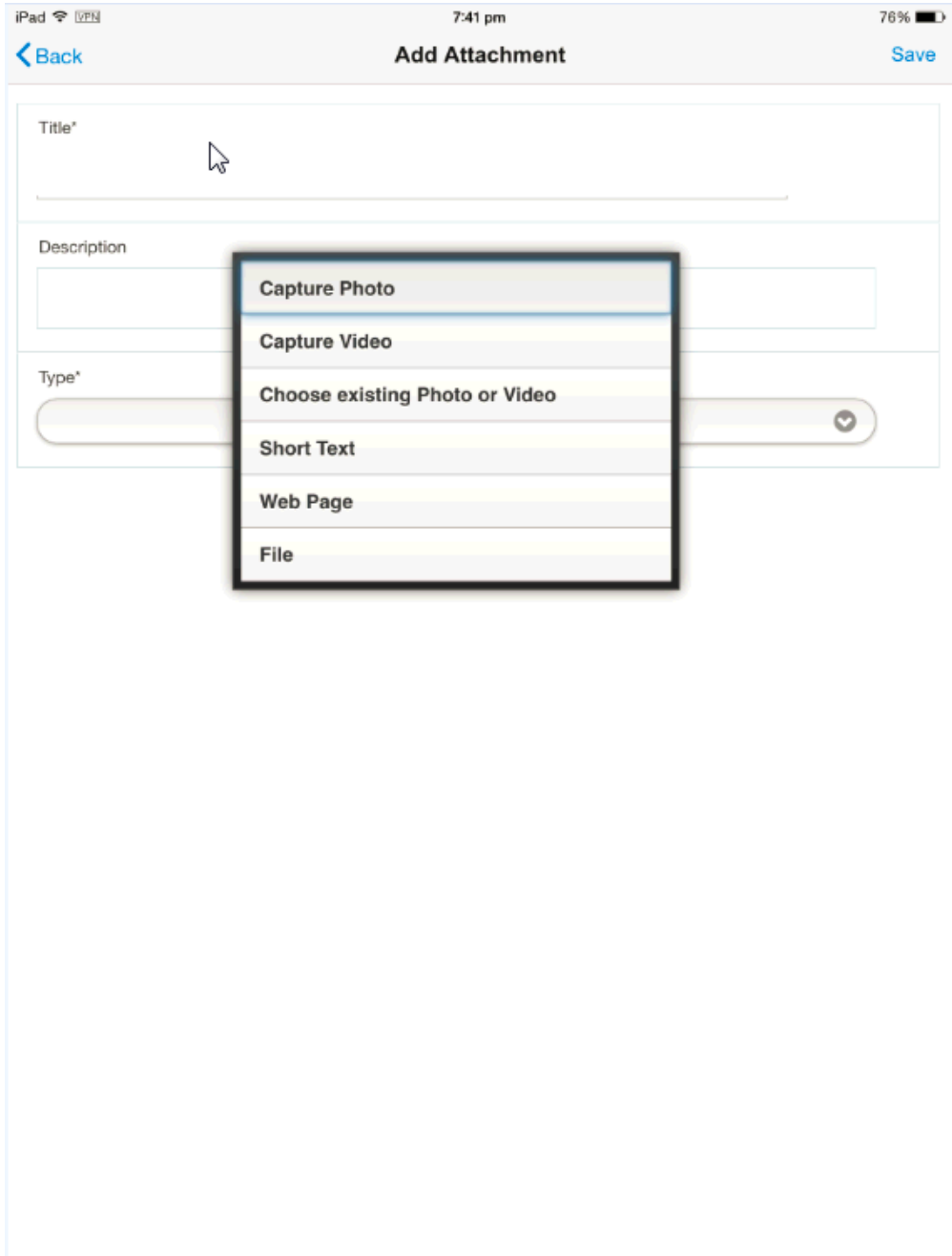
1





15. Tap on the Note icon to add a note to your task.



16. Tap on the Attachment icon to attach files to your task.



17. To create a follow-up task, tap on the Follow-Up task icon.

iPad  7:42 pm 76% 

← Back **Create Task** Save

---

**Name**  
 WIN Laptop Task

---

**Description**  
 WIN Laptop Task

---

**Status**  
 In Planning ➤

---

**Type**  
 Field Service Repair ➤



---

**Priority**  
 High ➤



---

**Planned Effort** UOM  
 2 Hour ➤

---

**Planned Start Time**  
 2016-08-16  03:26 PM 

---

**Planned End Time**  
 2016-08-16  05:26 PM 

18. To create a personal task, tap on the Personal task icon.

iPad VPN 7:43 pm 76%

[Back](#) **Personal Task** [Save](#)

Name

Description

Status  
Accepted

Type  
Personal

Priority  
Medium

Effort UOM  
Hour  
2

Scheduled Start Time 07:43 PM  
2016-08-23

Scheduled End Time 09:43 PM  
2016-08-23

Location 2200 Waverly Ave, San Jose, CA, 95122, US

[One-Time Address](#)


19. Tap on Report to generate the action summary report.



iPad 7:40 pm 77%

[Back](#) **Report** [Print](#)

**SERVICE REPORT**

 Oracle Corporation  
500 Oracle Pkway, Redwood City, CA 94065  
[+1.650.506.7000](tel:+16505067000)

**CUSTOMER INFORMATION**

Name	Business World
Address	400 Post Street , San Francisco, CA
Contact	Albert King-Business World-7828
Phone	<a href="tel:18005558355">1.800.555.8355</a>
Email	nobody@localhost
Service Request	66840
Service Date	Aug 23 2016 19:40

**TASK DETAILS**

Number	39185
Name	WIN Laptop Task
Status	Accepted
Start	2016-08-16 03:26 PM
Effort	2 Hour

**LABOR / PARTS / EXPENSE**

TYPE	ITEM	QUANTITY
Labor	FSLaborR12 - Labor Item	2 HR

Signature

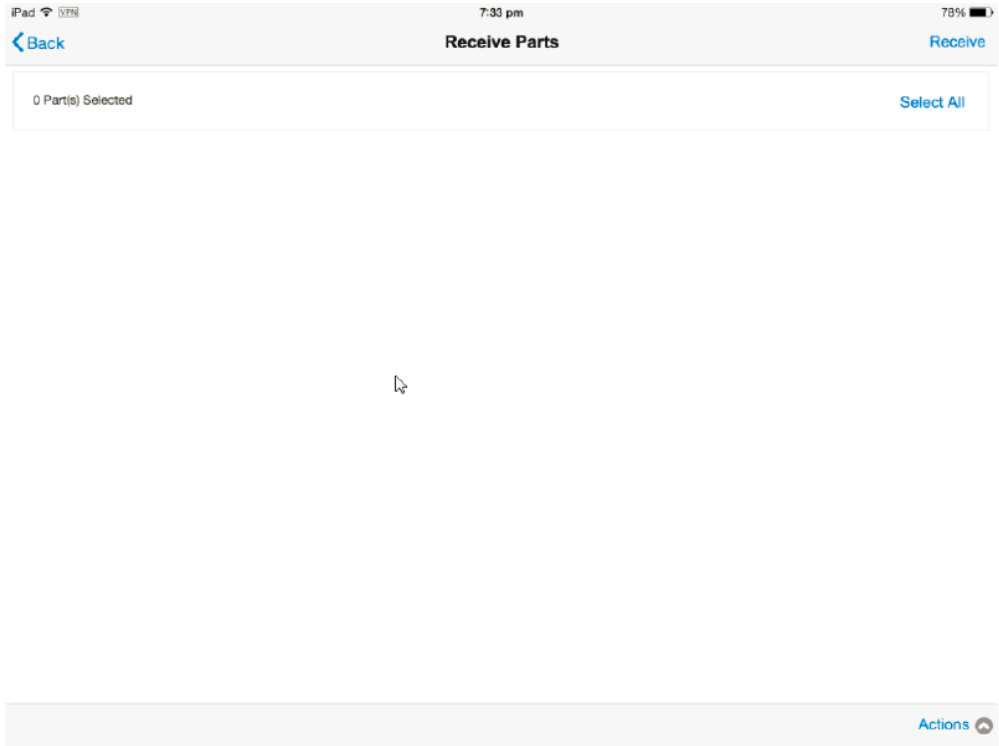
Name

Date

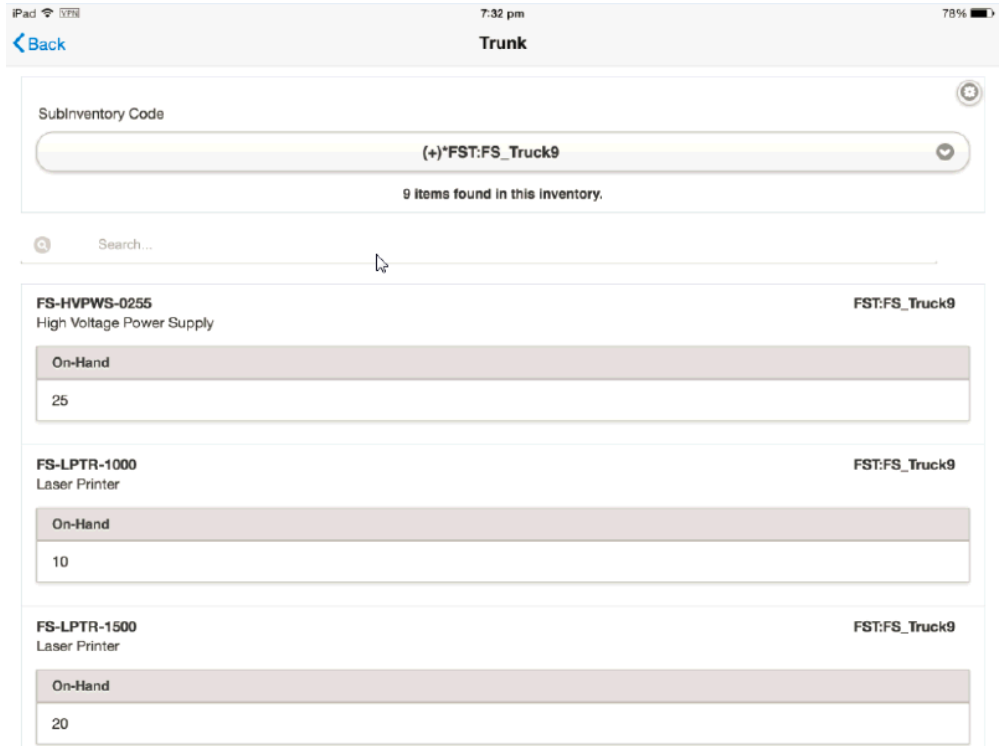
Oracle Corporation, 500 Oracle Pkway, Redwood City, CA 94065.

[Actions](#)

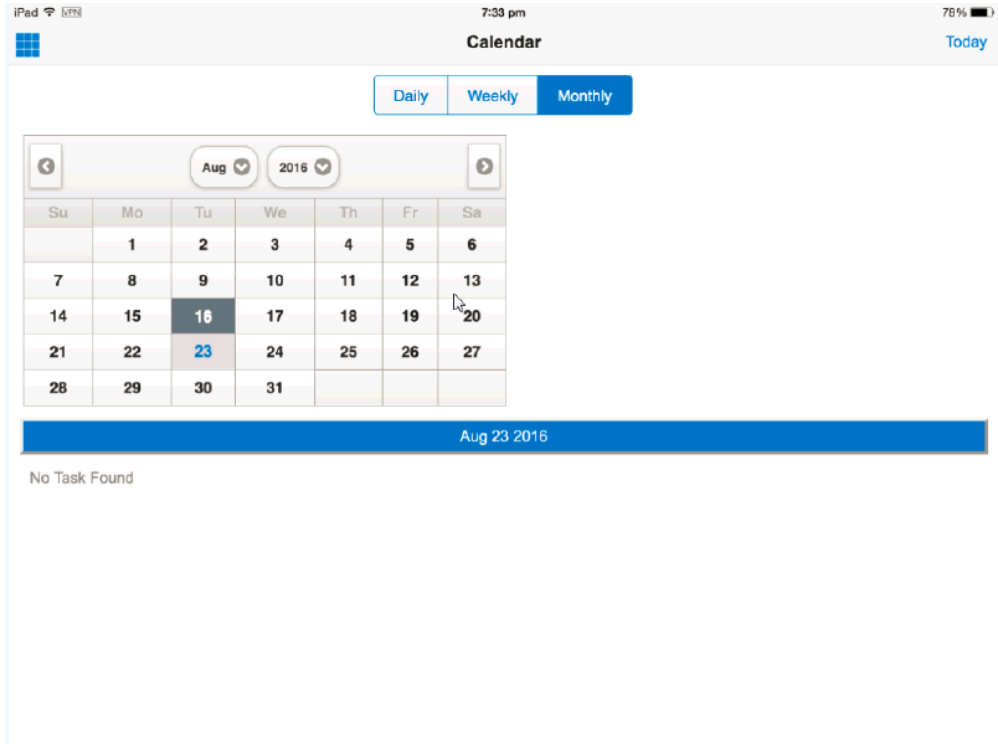
- To receive parts assigned to the task, navigate to the Home screen and tap on the Receive parts icon.



21. To view the items available in your inventory, on the Home screen, tap on the Trunk icon.



22. To access your calendar, on the Home screen, tap on the Calendar icon.



23. Sync your client application by tapping on the Sync icon.

\*User Name

PDESMOND

\*Password

••••••

\*Server

rws3260318.us.oracle.com:8000



Complete Refresh

Off

[Sync](#)



---

# Oracle Mobile Field Service (S&F) Multiplatform - Laptop Edition

## Introduction

This section describes some additional features that are available only on the laptop edition of the MAF based Store & Forward Multiplatform application such as:

- Multi-user access
- Enhanced Field Service Technician Dashboard
- Mobile Administrator UI
- Customer and asset data download
- Data integrity, synchronization and privacy in a multi-user laptop
- Flexfield support
- Customization support
- On-Hand Inventory Report

### Single User Laptop

Laptops that have the Oracle Mobile Field Service (S&F) Multi-Platform application installed can be used either by a single user or a group of users. Single user laptop is best suited for the individual field engineers who work independently. Only those data (such as tasks, parts order and associated data) pertaining to the engineer are downloaded to the laptop. If a second technician wants to use the laptop, then they have to uninstall the previous engineer's data and load the new data.

### Multi-User Laptop

Setting up a multi-user laptop provides technicians the ability to share the laptop with

more than one user without uninstalling the previous client data. This solution is especially useful in an environment with very strict budgetary constraints or in a highly secured environments such as defense organizations where hundreds of field operations need to be consolidated into one single laptop. In a multi-user laptop scenario, a group of field service users needs to be created along with a field service owner/administrator who manages the group. Following are some of the features of a multi-user laptop:

- Field Service Owner/Administrator manages the group
- Administrator monitors the group activities. Administrator can also transfer the service request to a different group.
- Field Engineers can open service request against any product
- Group consists of group owner, group administrator(s) and group member(s).
  - Group owner has ability to download, install and activate MFS application
  - Group administrator has the ability to view and reassign tasks to the group members
  - Group members are restricted to view only tasks assigned to them

#### **Setting up a multi-user laptop:**

As multiple users can use the same laptop to access the application, the following implementation steps must have been completed prior to installing and accessing the multiplatform application on the laptop:

- Field Service responsibility must have been assigned to each user
- Users must be assigned to the multi user group using CRM foundation
- The following member roles must be assigned to every user:
  - Field Service Group Owner
  - Field Service Group Administrator
  - Field Service Group Member
- The Manage Mobile User concurrent program must have been run to ensure that mobile users based on their assigned roles are created.

These steps have been described in detail in the Oracle Mobile Field Service Implementation Guide. The sections that follow describe the additional features on the laptop edition in detail.



## Using the Mobile Administrator User Interface

Field Service Administrators manage the flow of work assigned to a group of field service technicians. In addition to all the common features and functionalities of the Mobile Field Service Store & Forward Multiplatform application, technicians with Field Service Group Administrator role can access the Mobile Administrator Dashboard in the laptop installation to accomplish the following:

- authenticate users that belong to their groups
- schedule a newly created task to one of the group member
- view the task assignments of all their group members
- reassign the task among the group members
- update the task on behalf of their group members
- synchronize data between server and the device

### Prerequisites

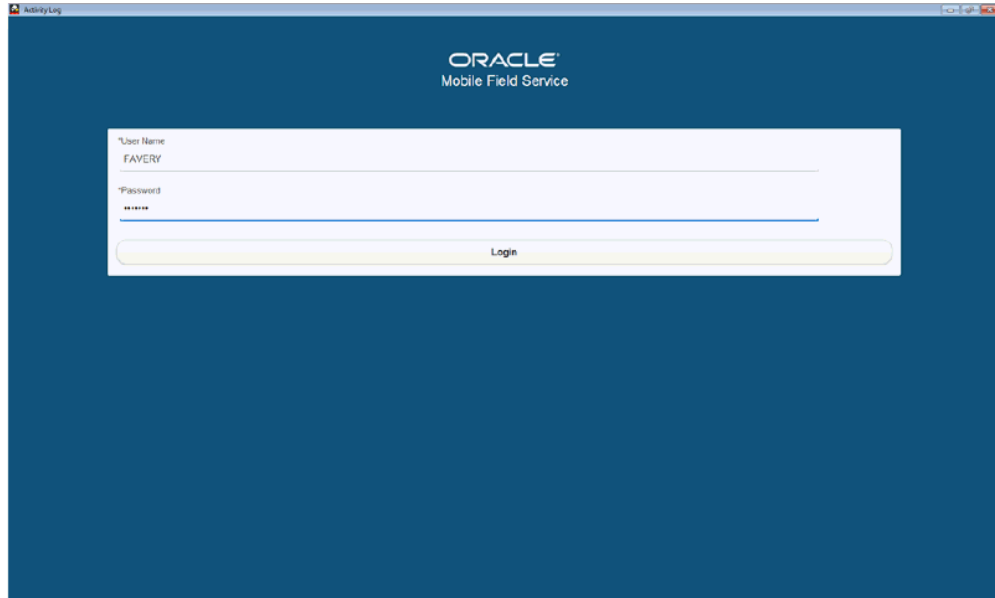
The Mobile Field Service Administrator/Group Owner must: .

- install the application
- authenticate each user that belongs to the group by his/her own user login credentials. Note: Each user will sign in with his/her enterprise user id and password
- sync the application. Data such as Group Details, Member Details, Service Requests and Tasks associated with each member are downloaded when the Group Owner installs the application and syncs it for the first time.

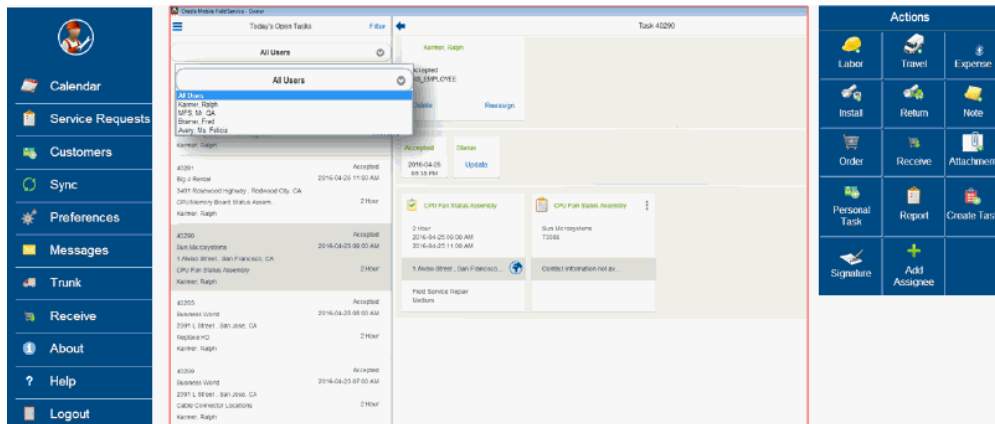
Incremental data changes for every group member are automatically uploaded to the server whenever there is network connectivity. Similarly, any assignment (for any resource) is downloaded to the client.

### To use the Mobile Administrator Dashboard:

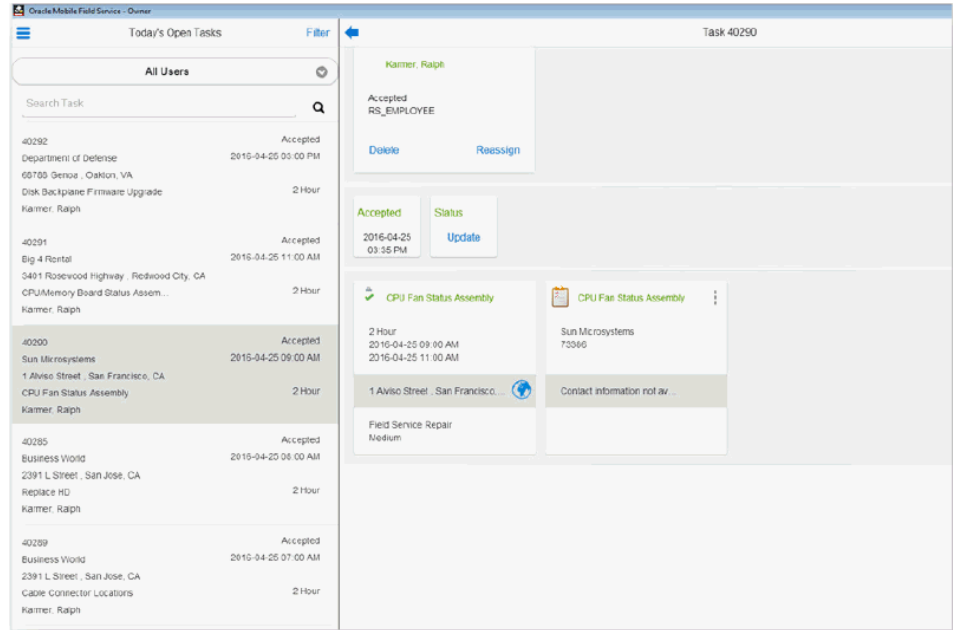
1. Launch the application to access the login screen.



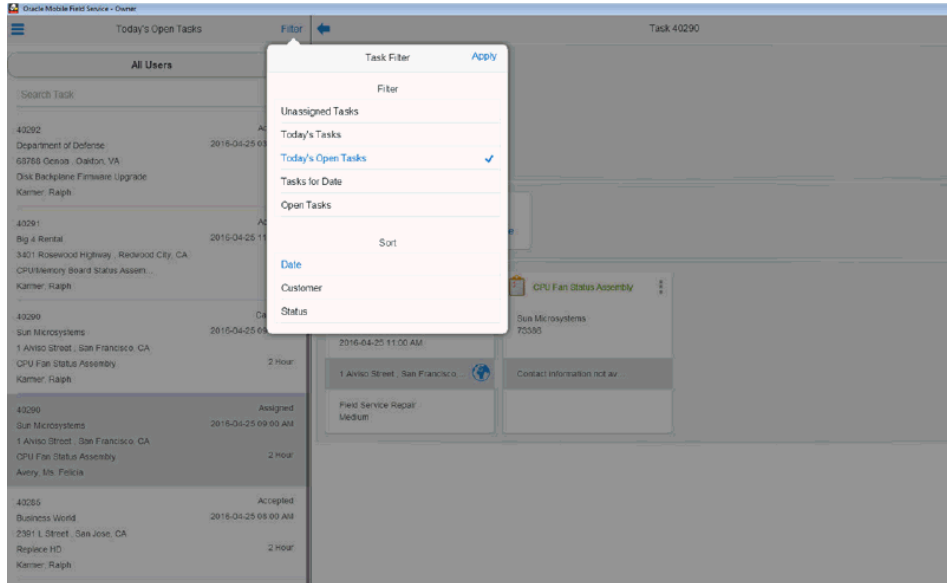
Enter the user name and password. Based on the role, appropriate screens are rendered. For instance, for users with group owner and administrator role, the Mobile Administrator Dashboard is launched. For other users, the Field Service Technician Dashboard will be launched.



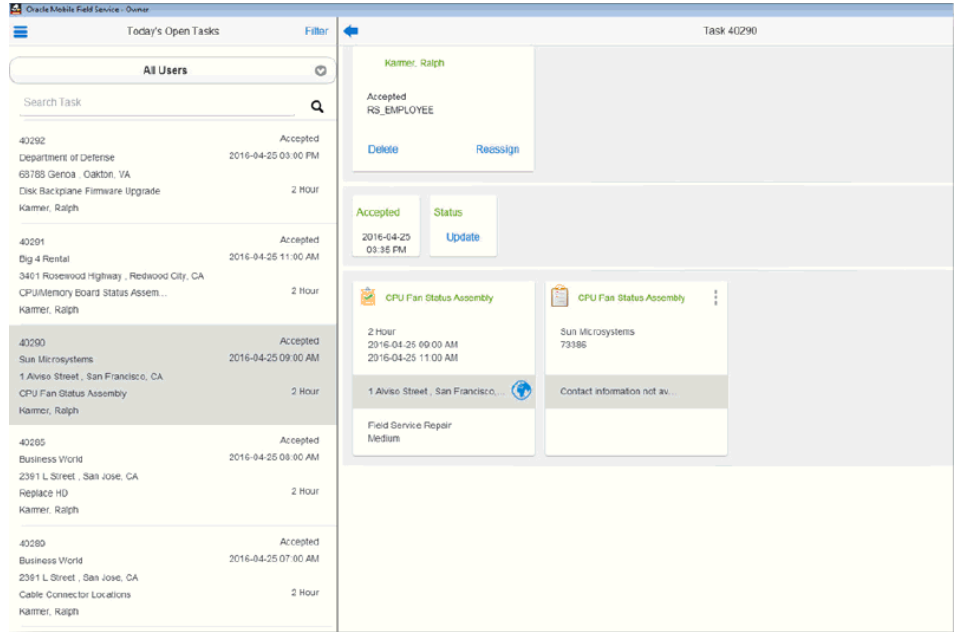
2. The Mobile Administrator Dashboard screen allows the administrator/group owner to manage their group. It has the following components:
  - The main panel displays tasks belonging to each member.
  - A task list that displays a list of all the tasks assigned to various members of the group. It displays the name of the resource that is currently assigned to the task. Two task records will be displayed in the task list if the task has been assigned to more than one resource. On the right frame, the top swim lane will then display more than one infotile



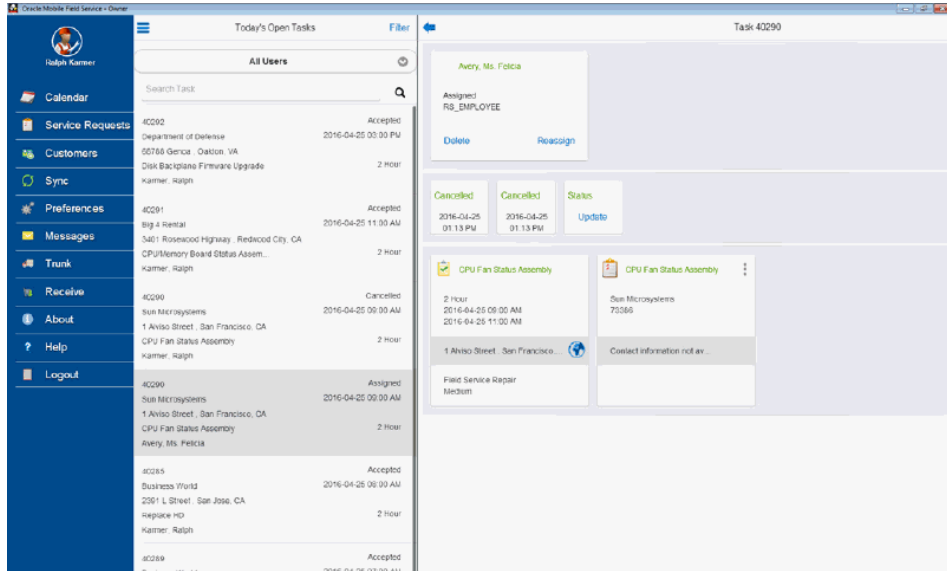
- A task filter that allows you to choose the type of task query you want to perform. For example, "Today's Task" query displays all tasks that are assigned to the field engineer, "Unassigned Task" which shows all tasks that are created in the client but not assigned to anyone yet.



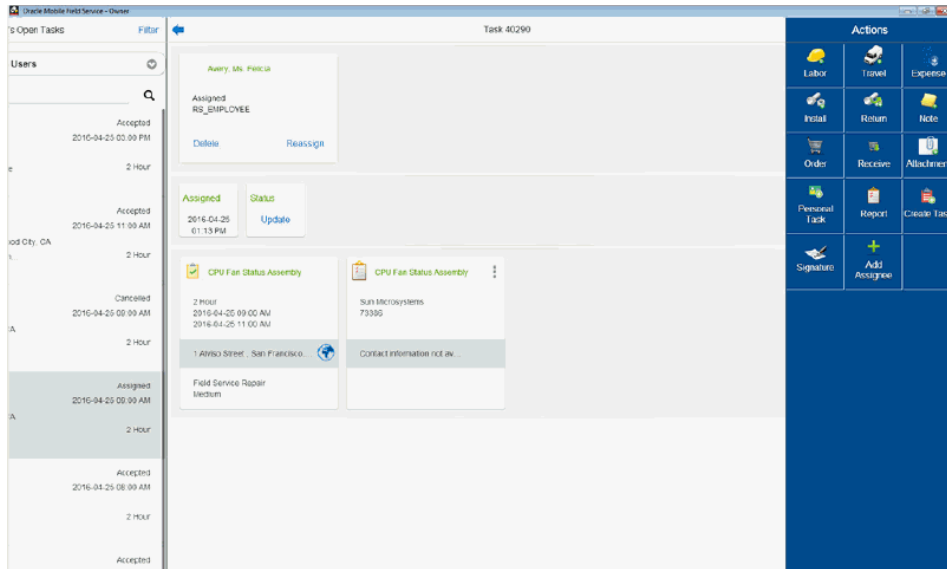
- An All Users filter to narrow down the task list based on individual member/resource.
- Details of the task assignment are displayed on the right side of the task pane when a particular task assignment is selected.
- A Reassign button on the task details infotile that allows the administrator to reassign the task to a different user. The existing task assignment is then cancelled and a new task assignment is created for the new resource.



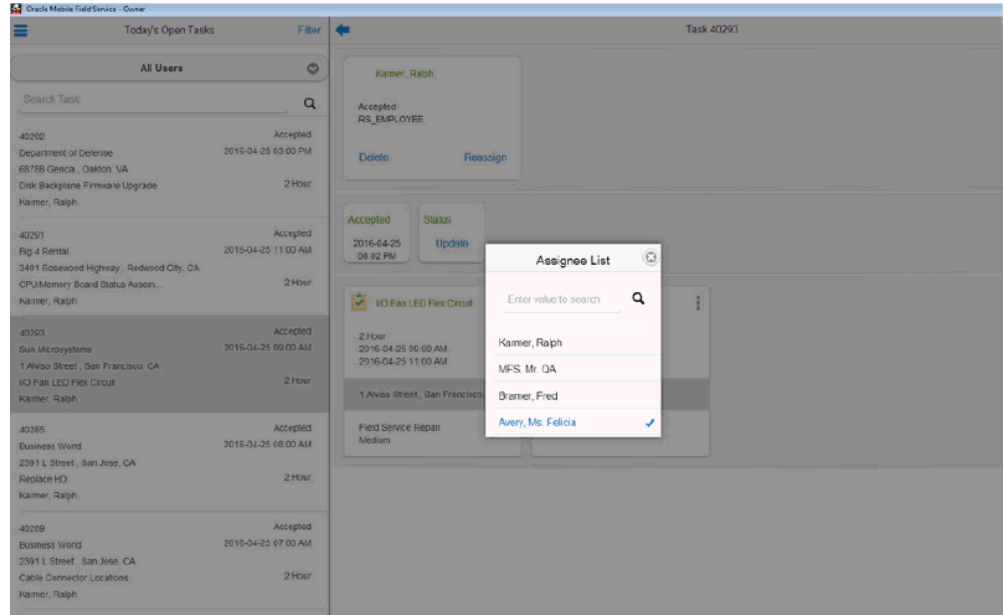
- A slide out menu on the left side to access the home screen. Home screen allows you to perform additional tasks such as viewing the calendar information, customer details, trunk stock, receiving parts, creating service requests and syncing the application.



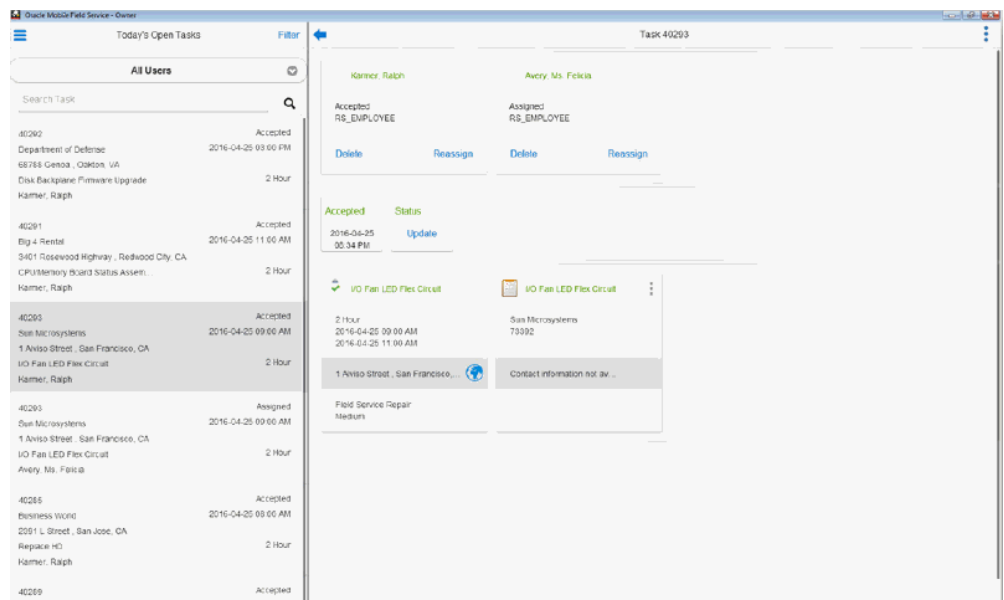
- An Actions menu on the right side that allows the administrator/group owner to fulfil various task-related activities such as adding travel, material, expense, and labor debrief, creating notes and so on.



3. Mobile Field Administrators can add additional resources to a task. To add an assignee, select the task and then click on the Add Assignee option in the Actions menu. A pop-up window is launched displaying the list of resources who are the members of that group.



4. Select the appropriate technician name and the new resources will be automatically created. Once you add the additional resource, the task list will display a task record for the newly added resource. The two assignees are now displayed in the right frame. Also, two active task records will be displayed in the task list.



### Download Customer and Asset Data:

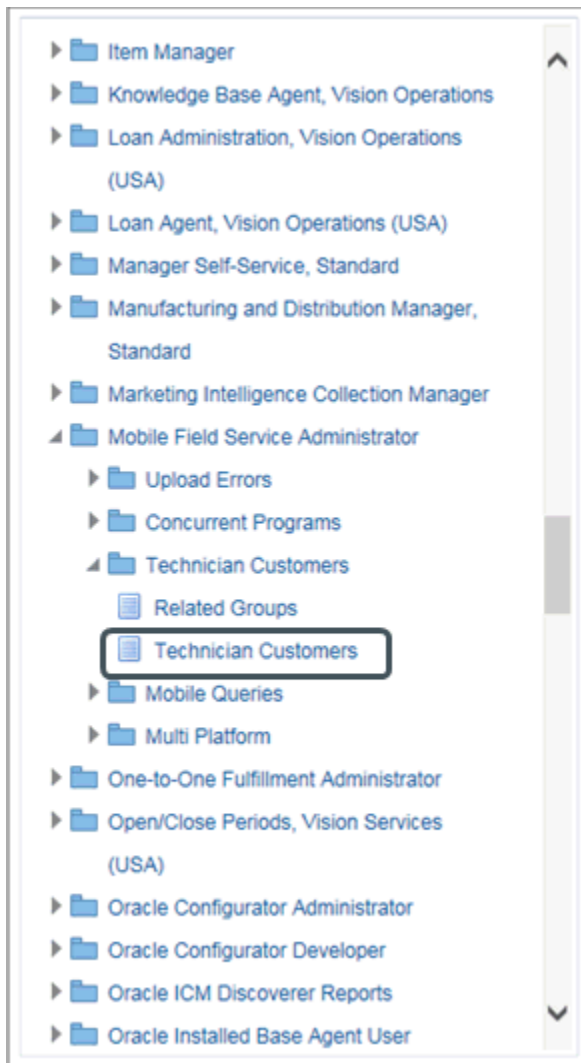
When the Field Service Group Administrator or Group Owner syncs the multiplatform client device with the enterprise server, all the customer and equipment data associated

with all the technician is downloaded to the device. This allows the field service technicians to access the list of customers and assets assigned to them so that they have the ability to create an ad-hoc service request for that customer when needed.

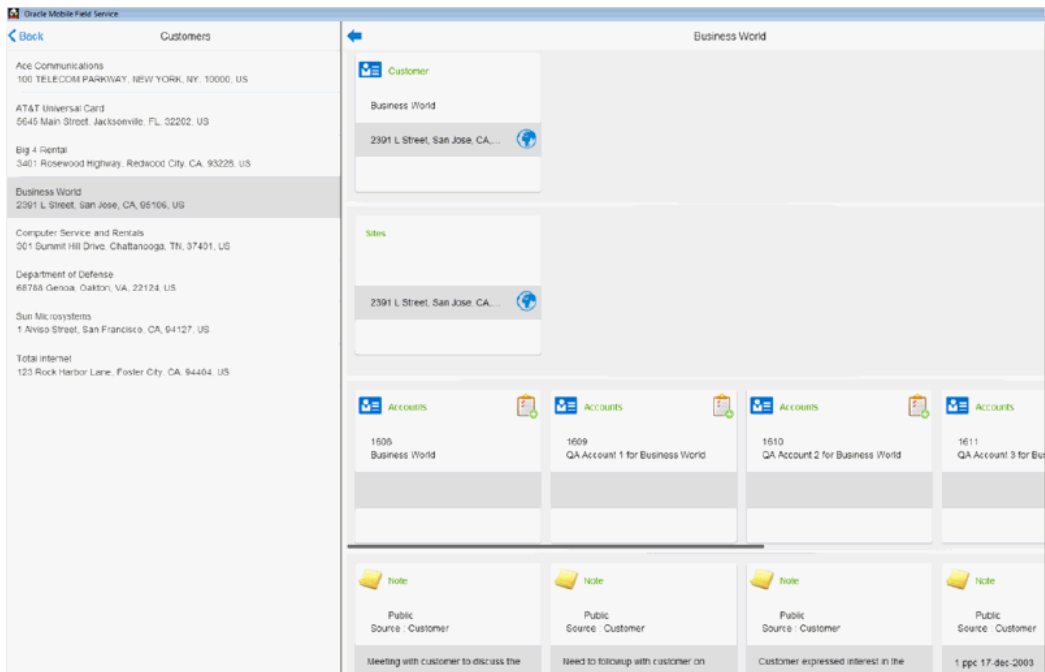
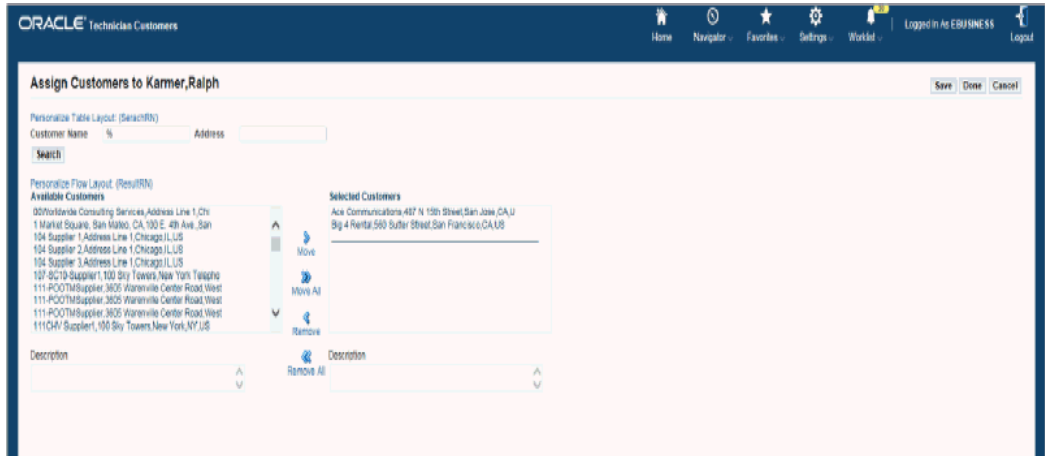
The following details are downloaded:

- Customer data must include all Contacts and Addresses for the Customer being downloaded. Customers are TCA Organization and Person Parties. Contacts are the Person Parties associated to these Customer Parties with the "Contact of" relationship type. Addresses are the Party Sites and Locations associated to these Customer Parties.
- Equipment data must include the Asset/Product records in the Installed Base that are owned by the Customer Parties being downloaded.

To assign customers to the field service technicians in your group, use the Assign Customers screen in the Enterprise Server as shown below.



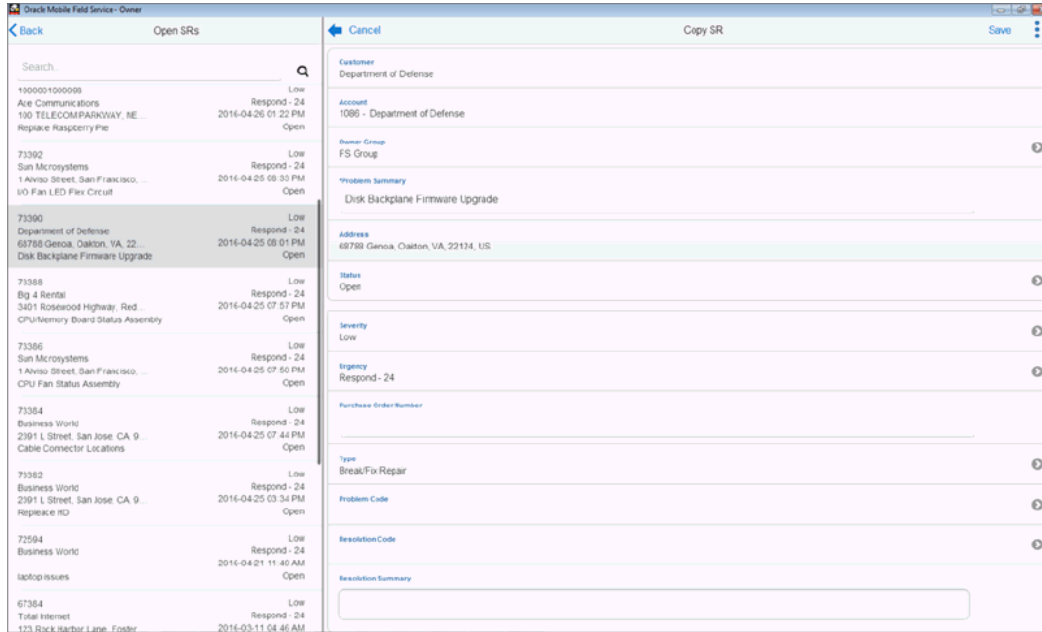




During the next sync, all those customer details are downloaded and displayed in the customer screen.

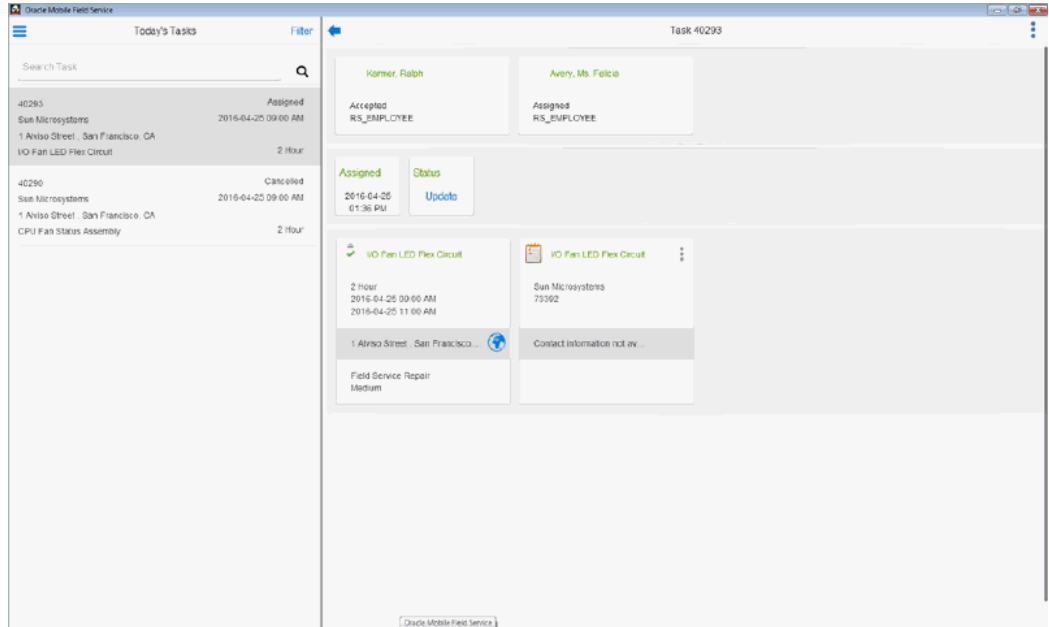
### Reassign Service Request:

In a multi-user laptop scenario, the field service administrator/group owner can transfer the service request assigned to the field service technician in their group to another group when the technicians do not have the expertise to perform the job.



## Using the Field Service Technician Dashboard

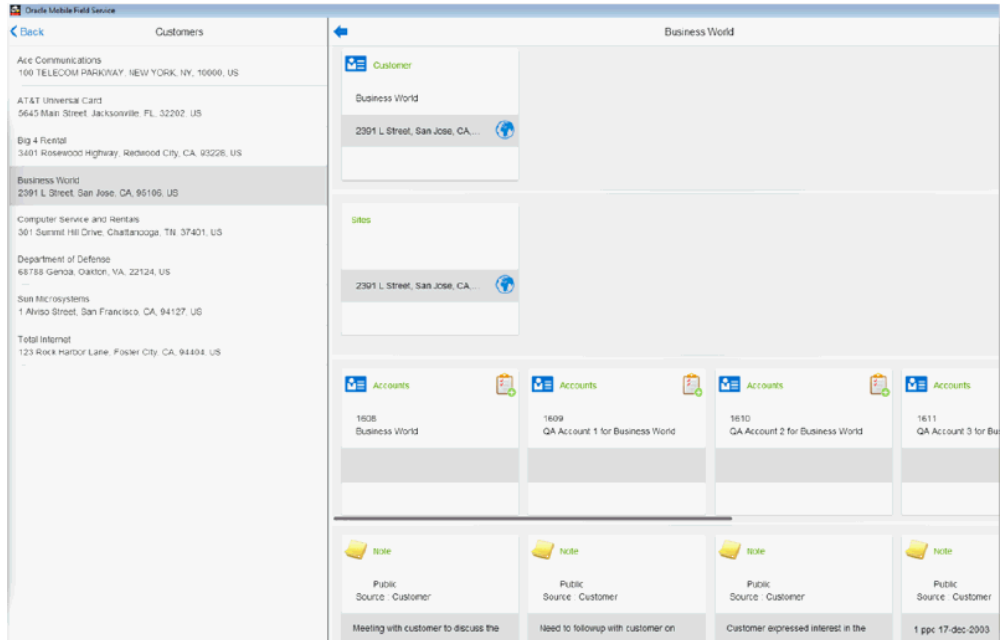
Field service technicians with the Field Service Group Member role can access the Field Service Technician Dashboard using their unique user id and password. The functionality available to the field service technician is described in detail in the section Using Oracle Mobile Field Service Store and Forward – Multiplatform. This section provides snapshots of the dashboard as rendered on the laptop. It also provides information on some additional functionality that is available only in a multi-user laptop.



Field Service technicians unlike the Mobile Field Service Administrator do not have access to features such as Task Reassignment and Add Assignee.

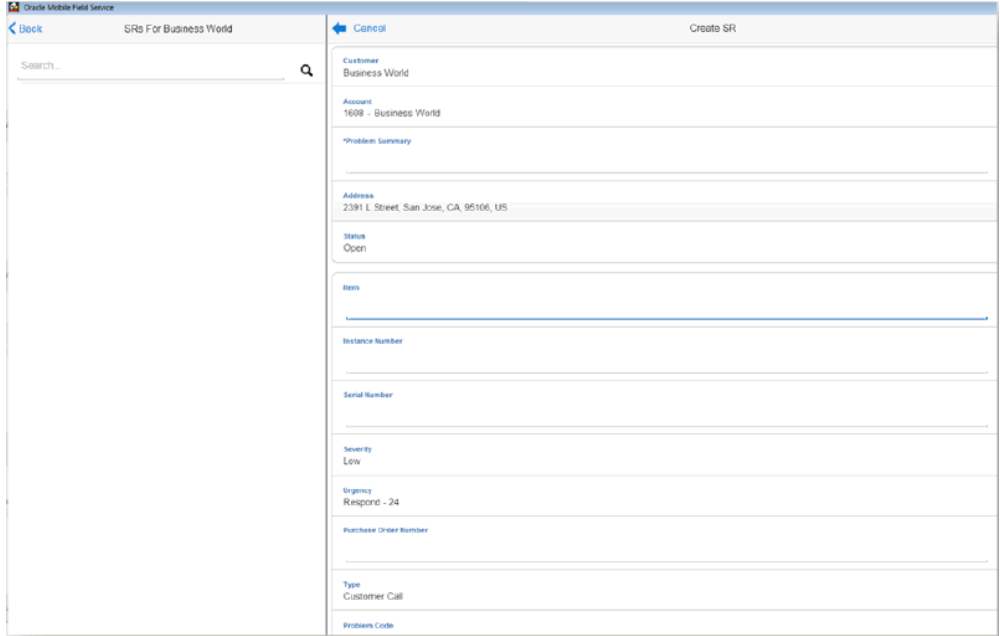
### To use the Field Service Technician Dashboard:

1. Launch the application and login using your unique user id and password. In a multi-user laptop, data relevant to only the technician logging in will be downloaded and displayed in the dashboard.
2. To create a service request and task, launch the Home screen from the task list.
3. Click on the Customers link. The customer list will be displayed in the left frame.

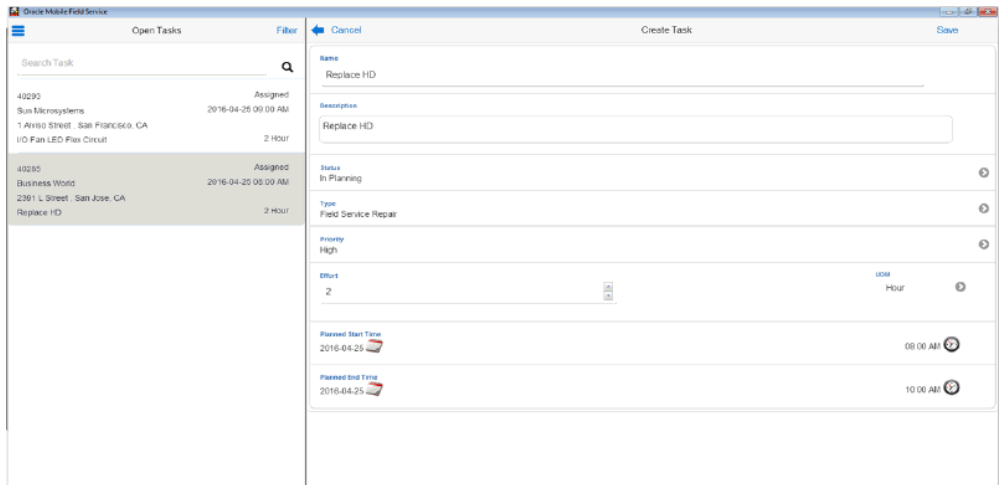


Customer list displays all customers that have open service requests and tasks assigned to them. Optionally, technicians can download additional customers with whom they work closely in their territory.














4. Select the customer from the list. Various customer attributes such as customer name, Site, Accounts, Product Installed, and existing open service requests are displayed in the right frame.
5. Click on the create service request icon (plus icon ) located near any one of these attributes. The Create Service Request UI is launched. Enter all required fields and save the service request.



6. The service request details will be displayed in the Service Request summary region. Field Service technicians can now do the following: Create a new task for this service request.

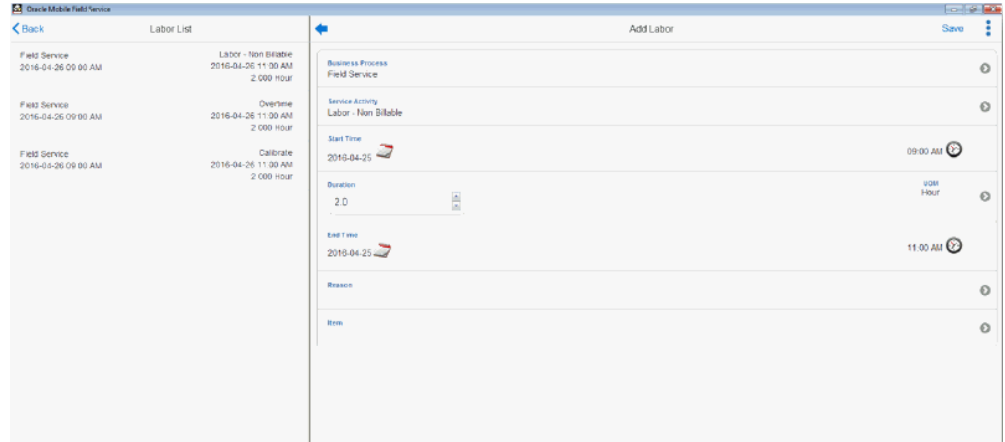


7. Once the task is created, the field service technician can click on the slide menu icon on the top right of the task details screen to launch the Actions menu to perform other task related activities such as adding debrief lines, notes, attachments, ordering parts, creating personal or follow up tasks and capturing the customer signature.

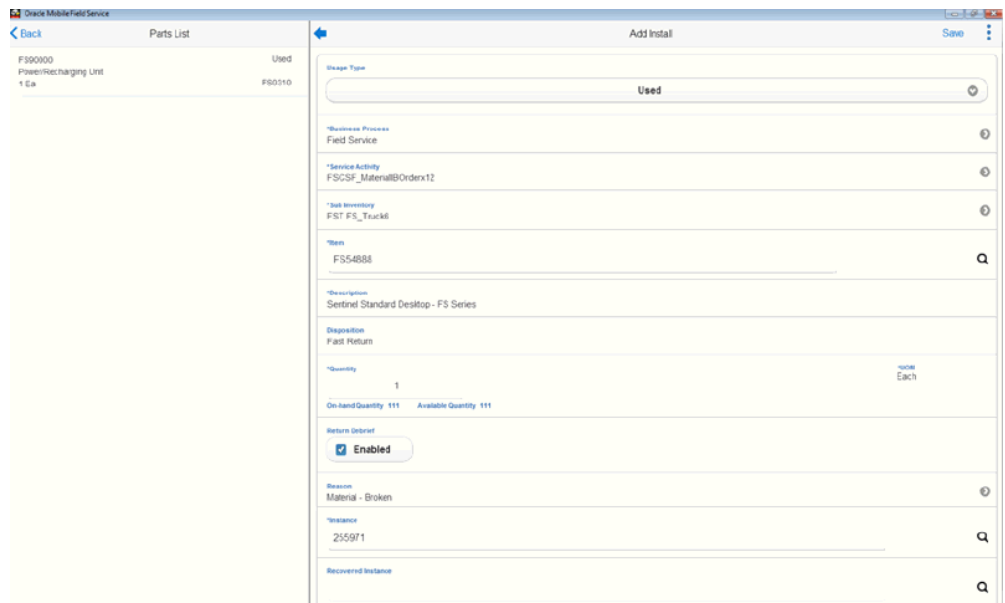
Actions		
 Labor	 Travel	 Expense
 Install	 Return	 Note
 Order	 Receive	 Attachment
 Personal Task	 Report	 Create Task
 Signature		

**Additional Information:** The ability to create a service request/task for customer/asset downloaded to the laptop is available only in a multi-user environment. In a single user environment, the field service technician will access their task list and perform the actions highlighted below.

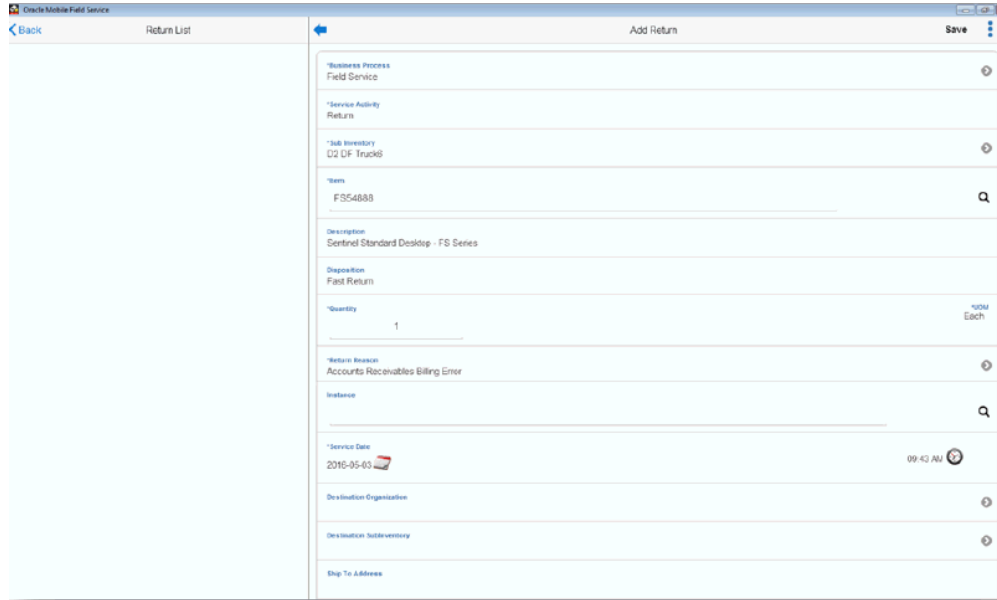
- To add a labor line, click on the Labor icon in the Actions menu. Add Labor screen is launched with default information in most of the fields. Change the values as required. Save the record. A new labor line will be displayed the summary on the left frame.



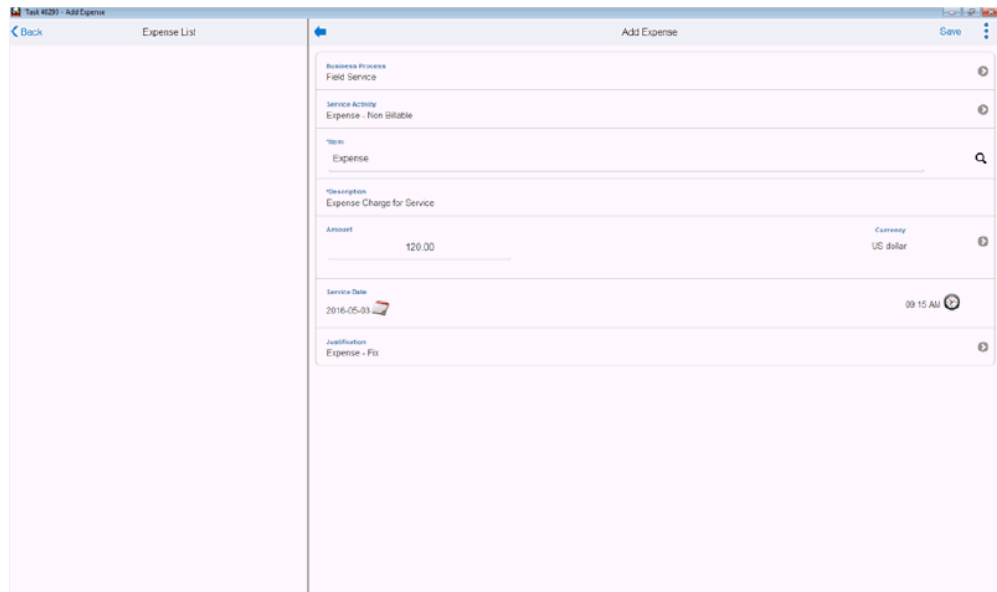
9. Click Install to add a material line to the task.



10. Click Return to create a material return for the task.



11. Click Expense to create expense debrief for the task.



12. Click Report to launch the Field Service Report and review the action summary.



**Report**

Oracle Corporation  
500 Oracle Pkway, Redwood City, CA 94065  
+1.650.506.7000

CUSTOMER INFORMATION	
Name	AT&T Universal Crd
Address	204 Shanxi Rd123, 354, 141, cbcvncv, CA, CA
Contact	
Phone	
Email	
SR Number	710876
Service Date	May 18 2016 01:37

TASK DETAILS	
Number	173430
Name	1213 Tasks
Status	Accepted
Start	2016-05-17 05:22 AM
Effort	2 Hour

LABOR / PARTS / EXPENSE		
TYPE	ITEM	QUANTITY
Labor	-	1 MIN
Labor	-	2 MIN
Expense	FSExpenseR12 - Expense Item	3 USD
Part	FS90000 - Power/Recharging Unit	1 Ea
Part	FS54888 - DRV,ASSY,36GB,10K,1FC,W/SPD PLT	1 Ea
Part	FS54888 - DRV,ASSY,36GB,10K,1FC,W/SPD PLT	1 Ea

Copyright © 2013, Oracle and/or its affiliates. All rights reserved.

13. To add a note to the task, click Note.

**Edit Note**

Complete  
816-4517 - This document describes the procedure for replacing

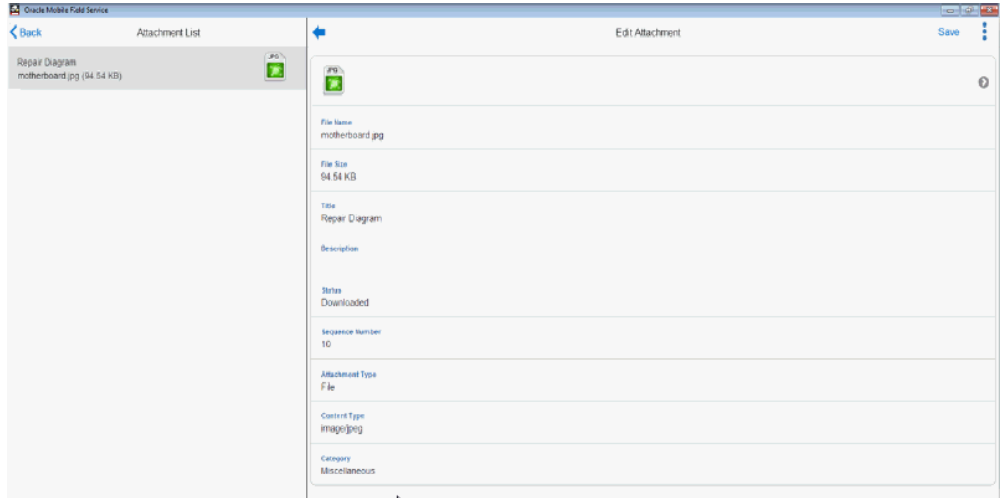
Type  
Complaint

Status  
Public

Last Modified  
2016-05-03 09:59 AM

Note Text  
816-4517 - This document describes the procedure for replacing the DC-to-DC converter on a 750 MHz CPU/Memory board (part number 501-5818-05) for the Sun Fire V800 server. You must replace the DC-to-DC converter on every -05 CPU/Memory board that has not had work order WO\_23100 performed on it. This must be done for every -05 CPU/Memory boards in a system. A -05 CPU/Memory board that already has the replacement DC-to-DC converter on it is identified by the work order label WO\_23100 affixed to the front label of the board, as shown in the following illustration.  
Note: You do not have to replace the DC-to-DC converter on the -07 750 MHz CPU/Memory board, part number 501-5818-07.

14. To attach photos, videos or web urls, click on Attachment.



15. Click on Order to search for parts and create parts requirement.

Oracle Mobile Field Service

Back Parts Search Search Save

\* Part Number Quantity

FS54888 1

Sub-Inventory  
FST FS\_Truck6

Need By  
2016-05-31 10:07 AM

Distance UOM

0 Mile

Address Type  
Task

\*Ship to  
1 Alviso Street, San Francisco, CA, 94127, US

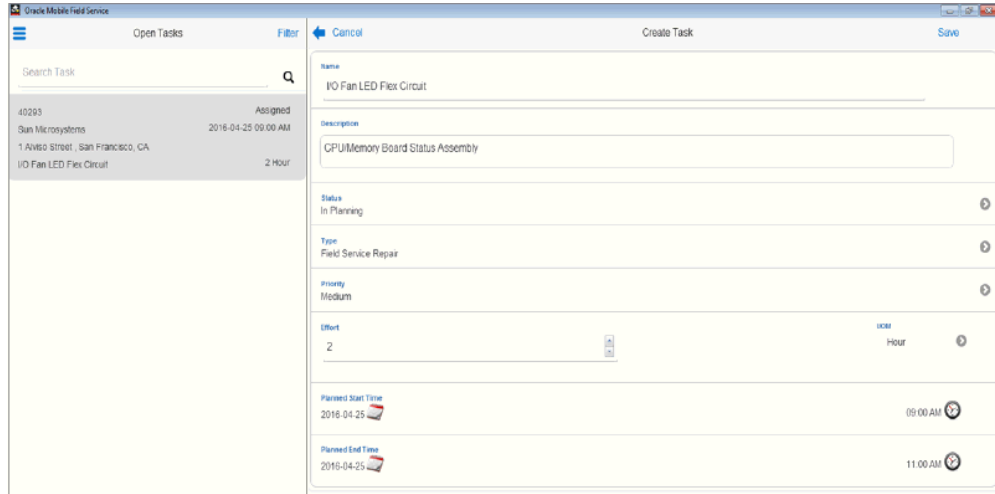
My Inventory:       Include Closed:

Co Worker:       Alternate:

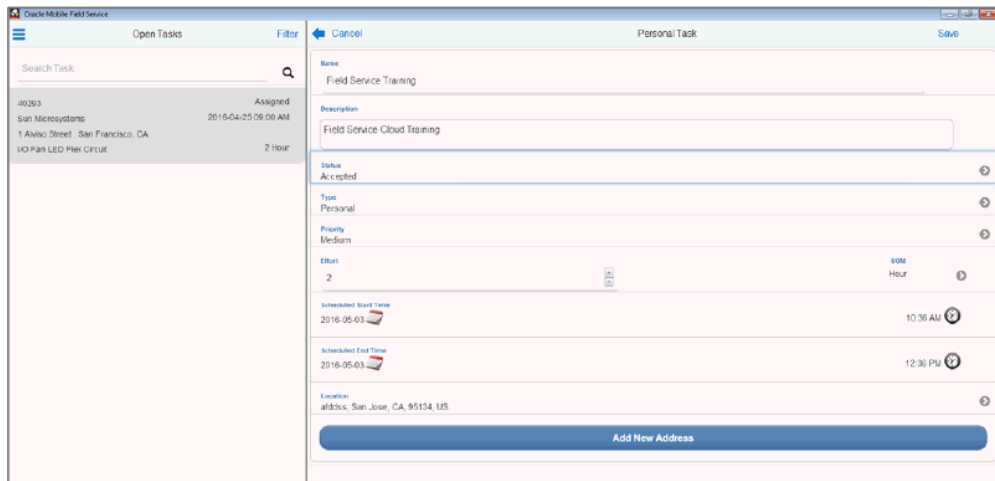
Manned:       Use Excess:

Unmanned:

- Click Create Task to create a follow-up task.



17. To record personal time, click Personal Task.



18. To view the trunk stock, click on the Trunk option in the Home page menu.

Sub Inventories	Parts
D2 DF Truck1 Bad Subinventory	<b>CM66429</b> Mother Board 5 On-hand FST:FS_Truck1
FST FS_Truck1 Default Good Subinventory	<b>FS18947</b> Sentinel Deluxe Desktop - FS Series 3 On-hand FST:FS_Truck1
FST FS_Truck3 Good Subinventory	<b>FS54888</b> Sentinel Standard Desktop - FS Series 4 On-hand FST:FS_Truck1
FST FS_Truck8 Good Subinventory	<b>FS55191</b> Internet Modem 10 On-hand FST:FS_Truck1
All Good & Bad Subinventories	<b>FS65101</b> Vision Pad - Bronze 7 On-hand FST:FS_Truck1
	<b>FS65102</b> Vision Pad - Bronze 3 On-hand FST:FS_Truck1
	<b>FS65103</b> Vision Pad - Gold 5 On-hand FST:FS_Truck1

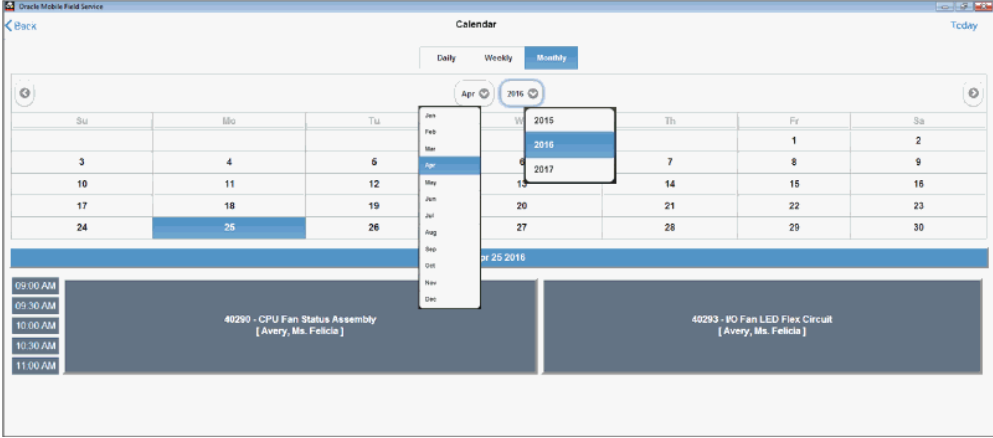
This screen renders slightly different for Mobile Field Service Administrators/Group Owners. In the Administrator Dashboard, users can query each technician's trunk using filter as shown in the screen below. This filter option is not available in the Technician's responsibility.

Sub Inventories	Parts
M1 FS_Truck6 Good Subinventory	<b>FS Loc Item</b> FS Locator Controlled Item 10 On-hand FST:FS_Truck6
M1 MSB Bad Subinventory	<b>FS-HVPWS-0255</b> High Voltage Power Supply 25 On-hand FST:FS_Truck6
D2 DF Truck6 Bad Subinventory	<b>FS-LPTR-1500</b> Laser Printer 21 On-hand FST:FS_Truck6
FST FS_Truck1 Good Subinventory	<b>FS-PPUA-4334</b> Paper Pick-Up Assembly 25 On-hand FST:FS_Truck6
FST FS_Truck6 Default Good Subinventory	<b>FS18947</b> Sentinel Deluxe Desktop - FS Series 9 On-hand FST:FS_Truck6
DF2 Exp-CP2 Good Subinventory	<b>FS54888</b> Sentinel Standard Desktop - FS Series 111 On-hand FST:FS_Truck6
All Good & Bad Subinventories	<b>FS55191</b> Internet Modem 10 On-hand FST:FS_Truck6

- The Calendar feature present in all form factors of the multiplatform application provides field service technicians with the ability to view the field service tasks in Calendar view. Technicians can view a snapshot of their daily, weekly, or monthly tasks. To open the calendar, click on the Calendar option in the Home screen menu. You can also set Calendar as the default home page.

Left frame of the calendar screen shows following calendar views: Daily, Weekly, and Monthly. Upon tapping one of the menu item, corresponding calendar page

will be displayed on the right frame. In the Weekly and Monthly sections, dates that are colored light blue have tasks that are scheduled. In a Day's time table, green colored tasks are Personal Tasks and the light blue ones are Field Service Tasks. Time table shows time in 30 minute blocks consecutively right from start time of the first task till the end-time of the last task for the day.



---

## Using an E-Mail Interface for Mobile Queries

This chapter covers the following topics:

- E-Mail Mobile Queries

### E-Mail Mobile Queries

You can use e-mail to send predefined queries to the enterprise and receive answers by e-mail. You can execute these queries using any devices available in the market that have e-mail capability. Typically this feature supports the service request flow in updating task information, especially in completing task execution at a customer site. Some of the queries that you can make are as follows: get the day's task information, update a task status in the field, and attach a note to a task. These "queries" are not limited to passive read operations but also include update operations. To augment the seeded queries, administrators can create custom queries to support your business processes.

### Prerequisites

- You must set several profiles as defined in the *Oracle Mobile Field Service Implementation Guide*.

#### To send and receive a mobile query by e-mail:

1. Consult a list of available mobile query commands. The following table, Seeded Mobile Query Commands, lists the commands that are seeded with the application.
2. Format a mobile query in the user send box for e-mail:
  - In the subject line of the e-mail, specify the command and values for the required parameters.

#### Example

Example: Mytasks david.baker@abc.com

- Address the e-mail to the central mobile query e-mail inbox.
3. Send the e-mail to the mobile query e-mail inbox.

The concurrent program Process Email Mobile Queries reads the unread e-mail from the predefined inbox and runs the embedded query from the e-mail. Then the program sends the formatted result in the body of an e-mail based on your e-mail format preferences.

4. Read and perhaps print the resulting e-mail.

**Seeded Mobile Query Commands**

Seeded Command	Parameter	Details	Security	Output
Mytasks	Email ID (optional)	Gets the list of open tasks.	<p>Case 1:</p> <p>An individual technician is allowed to view the task assignment status of those tasks that are assigned to him/her.</p> <p>No profiles are used.</p> <p>No parameter is required in this case.</p> <p>Case 3:</p> <p>Group administrators have the ability to view the tasks that are assigned to the members of their groups.</p>	<p>Email Subject Line:</p> <p>Success/Error: - Mobile Query Response: MYTASKS</p> <p>Following fields are displayed in the email body:</p> <p>· SERVICE REQUEST</p>



Seeded Command	Parameter	Details	Security	Output
			No parameter is required in this case.	· CUSTOMER
			Case4:	· TASK NUMBER
			Group administrators are allowed to view the task list of a particular technician by sending the command with the email ID of that technician.	· SUBJECT
			Parameter <i>email ID</i> is required in this case.	· STATUS
				· SCHEDULED START DATE
				· SCHEDULED END DATE

Seeded Command	Parameter	Details	Security	Output
			<p>Case5:</p> <p>Third party administrators can view the tasks that are assigned to administrators, members of third party groups and the tasks assigned to the group.</p> <p>A group administrator can execute the query with a technician's e-mail ID to view the list of tasks assigned to the technician.</p>	
Partinfo	Part number	Searches for parts based on the technician's location.	<p>Enables technicians /administrators to view if the part is returnable or consumable.</p> <p>Enables you to know if the part is Serialized, Lot controlled, Locator controlled, or IB Trackable.</p> <p>Enables technicians /administrators to view the Item Revision of the part.</p>	<p>The following fields are displayed in the e-mail</p> <ul style="list-style-type: none"> <li>· DATA</li> <li>FROM:</li> <li>· PART NUMBER</li> <li>· DESCRIPTION</li> <li>· STATUS</li> <li>· REPAIRABLE</li> <li>· RETURNABLE</li> <li>· CONSUMABLE</li> </ul>

Seeded Command	Parameter	Details	Security	Output
Partsub		Searches for substitute parts if the primary part is not available to meet the SLA.	Enables you to view the valid substitute and supersession items in the inventory.  Notes associated with substitutes and supersession that are of type text are only displayed. For other attachments only a message is displayed.	The following fields are displayed in the e-mail: . SUPPLIED ITEM . DESCRIPTION . ITEM TYPE . SUBSTITUTE ITEM . DESCRIPTION . SOURCE ORGANIZATI ON . SOURCE SUBINVENTO RY

Seeded Command	Parameter	Details	Security	Output
Partavail	Part Number	Searches for the availability of the required part.		<p>The following fields are displayed in the e-mail:</p> <ul style="list-style-type: none"> <li>· SOURCE ORGANIZATION</li> <li>· SOURCE SUBINVENTORY</li> <li>· SOURCE TYPE</li> <li>· DISTANCE</li> <li>· ITEM DESCRIPTION</li> <li>· AVAILABLE QUANTITY</li> <li>· ITEM TYPES</li> </ul>

Seeded Command	Parameter	Details	Security	Output
Parttrninfo	Part Number	<p>Displays all available return locations for both, defective and excess parts.</p> <p>Mobile query sets the assignment status of the value defined in the profile CSF: Default Completed Task Status.</p>		<p>The following fields are displayed in the e-mail:</p> <ul style="list-style-type: none"> <li>· PART NUMBER</li> <li>· PART DESCRIPTION</li> <li>· SOURCE ORGANIZATION</li> <li>· SOURCE SUBINVENTORY</li> <li>· RETURN ORGANIZATION</li> <li>· RETURN SUBINVENTORY</li> <li>· RETURN ADDRESS</li> <li>· RETURN TYPE</li> </ul>
Accept	Task No	<p>Updates task assignment status to Accept.</p>	<p>The task being updated must be assigned to the sender of the command.</p> <p>Third Party administrators can update the status of tasks that are assigned to their technicians and the tasks</p>	<p>Email Subject Line:</p> <p>Success/Error - Mobile Query Response: ACCEPT</p>

Seeded Command	Parameter	Details	Security	Output
		Mobile query sets the assignment status of the value defined in the profile CSF: Default Travel Task Status	assigned to the group.	<p>The following notification is displayed in the email body:</p> <p>Mobile Query Request From:</p> <p>TECH1@oracle.com</p> <p>Command:</p> <p>ACCEPT Parameter: [36780] has</p> <p>been executed successfully.</p> <p>Response ID: 144</p>
Travel	Task No	Updates task assignment status to Traveling.	<p>The task being updated must be assigned to the sender of the command.</p> <p>Third Party administrators can update the status of tasks that are</p>	Email Subject Line:

Seeded Command	Parameter	Details	Security	Output
		Implementers can use their own custom defined status by changing the MQ definition.	assigned to their technicians and the tasks assigned to the group.	Success/Error - Mobile Query Response: ACCEPT
		Refer to Section 11 User Procedures for more details on how to implement new MQs.		Email Subject Line:
				Success/Fail - Mobile Query Response: TRAVEL
				The following notification is displayed in the email body:
				Mobile Query Request From:
				TECH1@oracle.com:
				TRAVEL Parameter: [36780] has
				been executed successfully.

Seeded Command	Parameter	Details	Security	Output
				Response ID: 145
Working	Task No	Updates task assignment status to Working.  Mobile query sets the assignment status to the value defined in the profile CSF: Default Working task status.	The task being updated must be assigned to the sender of the command.  Third Party administrators can update the status of tasks that are assigned to their technicians and tasks assigned to the group.	Email Subject Line:  Success/Error - Mobile Query Response: WORKING  The following notification is displayed in the email body:  Mobile Query Request From:  TECH1@oracle.com  Command:  WORKING Parameter: [36780]  has been executed



Seeded Command	Parameter	Details	Security	Output
				successfully. Response ID: 146
Cancel	Task No	Updates task assignment status to Canceled.  Mobile query sets the assignment status to the value defined in the profile CSF: Default Cancelled task status.	The task being updated must be assigned to the sender of the command.  Third Party administrators can update the status of tasks that are assigned to their technicians and tasks assigned to the group.	Email Subject Line:  Success/Error - Mobile Query Response: CANCEL  The following notification is displayed in the email body:  Mobile Query Request From:  TECH1@oracle.com  Command:  CANCEL Parameter: [36780]

Seeded Command	Parameter	Details	Security	Output
				has been executed successfully.
				Response ID: 147
Closed	Task No	Updates the task assignment status to Closed.  Mobile query sets the assignment status to the value defined in the profile CSF: Default Auto Close Task Status.	The task being updated must be assigned to the sender of the command.  Third Party administrators can update the status of tasks that are assigned to their technicians and tasks assigned to the group.	Email Subject Line:  Success/Error - Mobile Query Response: CLOSED  The following notification is displayed in the email body:  Mobile Query Request From:  TECH1@oracle.com  Command:  CLOSED Parameter: [36780] has

Seeded Command	Parameter	Details	Security	Output
				been executed successfully.
				Response ID: 148
Completed	Task No	Updates the task assignment status to Completed.  Implementers can use their own custom defined status by changing the MQ definition.  Refer to Section 11.User Procedures for more details on how to implement new MQs.	The task being updated must be assigned to the sender of the command.  Third Party administrators can update the status of tasks that are assigned to their technicians and the tasks assigned to the group.	Email Subject Line:  Success/Error - Mobile Query Response: COMPLETED  The following notification is displayed in the email body:  Mobile Query Request From:  TECH1@oracle.com  Command:  COMPLETED Parameter:

Seeded Command	Parameter	Details	Security	Output
				[36780] has been executed  successfully.  Response ID: 149
Addnote	Task No, Note	Attach a note to the task.	The task being updated must be assigned to the sender of the command.  Third Party administrators can add notes to tasks that are assigned to their technicians, if the tasks belong to any member of the group.	Email Subject Line:  Success/Error - Mobile Query Response: ADDNOTE  Following notification is displayed in the email body:  Mobile Query Request From: TECH1@oracle.com  Command: ADDNOTE  Parameter: [36779, Please Call  the Customer Before the Visit]

Seeded Command	Parameter	Details	Security	Output
		Out-of-the box, Notes will be created with note visibility "Public"		has been executed successfully.
		Implementers can set the visibility to Internal by changing the MQ definition.		Response ID:85
		Refer to section 11.User Procedures for more details on how to implement new MQs.		
Sendtask	Task No	Send all details of the task.	The task being requested must be assigned to the sender of the command.	Email Subject Line:
			Additionally, task notes are displayed.	Success/Error - Mobile Query Response: SENDTASK
		Additionally, task notes are displayed.		

Seeded Command	Parameter	Details	Security	Output
			<p>Third Party administrators can view task details, including the notes on the task, for tasks that are assigned to their technicians and the tasks assigned to the group.</p>	<p>The following fields are displayed in the email body:</p> <ul style="list-style-type: none"> <li>· TASK NUMBER</li> <li>· TASK NAME</li> <li>· DESCRIPTION</li> <li>· PRIORITY</li> <li>· TYPE</li> <li>· STATUS</li> <li>· CUSTOMER</li> <li>· SCHEDULED_START_DATE</li> <li>· SCHEDULED_END_DATE</li> </ul>

Seeded Command	Parameter	Details	Security	Output
				· SUMMARY
				· PROBLEM_CODE
				· ADDRESS
				· PLANNED_EFFORT
				· UNIT_OF_MEASURE
				· ITEM
				· SERIAL_NUMBER
				Note Region
				· Note Type
				· Note Details
Sendsr	SR No	Send all details of the service request	The SR (through the task) being requested must be assigned to the sender of the command.  Third Party administrators can view	Email Subject Line:  Success/Error - Mobile Query Response: SENDSR

Seeded Command	Parameter	Details	Security	Output
		Additionally, task notes are displayed.	service request and tasks details for service requests or tasks that are assigned to their technicians and the tasks assigned to the group.	<p>The following fields are displayed in the email body:</p> <ul style="list-style-type: none"> <li>· SERVICE REQUEST</li> <li>· DESCRIPTION</li> <li>· CUSTOMER NAME</li> <li>· STATUS</li> <li>· SEVERITY</li> <li>· REPORTED_DATE</li> <li>· INSTALL BASE</li> <li>· INSTANCE</li> <li>· SERIAL_NUMBER</li> <li>· PROBLEM_CODE</li> </ul>



<b>Seeded Command</b>	<b>Parameter</b>	<b>Details</b>	<b>Security</b>	<b>Output</b>
Chkentitle	Serial numbers	Send the Entitlements for the serial numbers.	<p>The IB items being requested should be visible to sender of the command through a task assignment.</p> <p>Third Party administrators can view contract information associated with a service request that is assigned to their technicians and the tasks assigned to the group.</p>	<p>Email Subject Line:</p> <p>Success/Error - Mobile Query Response: CHKENTITLE</p> <p>The following fields are displayed in the email body:</p> <ul style="list-style-type: none"> <li>· NUMBER</li> <li>· NAME</li> <li>· DESCRIPTION</li> <li>· STATUS</li> <li>· COVERAGE_NAME</li> <li>· COVERAGE_TYPE</li> <li>· COVERAGE_DESCRIPTION</li> <li>· WARRANTY</li> <li>· START_DATE</li> </ul>

---

<b>Seeded Command</b>	<b>Parameter</b>	<b>Details</b>	<b>Security</b>	<b>Output</b>
				.
				END_DATE
				.
				WARRANTY DETAILS

---

# Part 3

---

## Oracle Mobile Field Service - Wireless (Online)



---

## Using Oracle Mobile Field Service - Wireless

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
- Generating Field Service Report and Capturing Signature
- Creating a Service Request
- Creating a Service Request from the Main Menu
- Creating a Follow-Up Task
- Understanding Scheduling Tasks
- Starting Self-Assigned Tasks Immediately
- Self-Scheduling Tasks
- Using Window to Promise to Schedule Tasks
- Using the Intelligent Mode to Schedule Tasks
- Creating a Personal task
- Viewing Install Base Product Configuration
- Viewing and Scheduling Unassigned/Assigned Tasks (Decentralized Scheduling)
- Making Mobile Queries
- Performing a Parts Search

- Using Radius Search Capabilities
- Creating a Parts Requirement
- Ordering Parts
- Creating an Internal Transfer
- Creating a Move Order
- Creating an Internal Order
- Receiving Parts
- Returning Parts
- Transferring Parts
- Viewing Project Details
- Accessing the Knowledge Base
- Getting Driving Directions
- Viewing and Saving an Offline Schedule
- Managing Receipt of Shipments
- Changing Passwords
- Selecting Preferences
- Viewing Technician Calendar

## Introduction

Oracle Mobile Field Service - Wireless enables field service technicians access to information necessary to perform work at a customer's site.

Not only can technicians view their daily schedule 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 enables technicians to access their daily schedule 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.

**Important:** To display the Springboard user interface instead of the Main menu, you must set the profile option 'Oracle Applications Look and Feel' to profile value 'Alta Look and Feel', which will render the Alta screen.

### Support for Blackberry™ Devices

The Mobile Field Service - Wireless application user interfaces are certified for use on common mobile application devices, such as iOS and Android devices.

#### Example

- Create new Service Request page
- Create Follow up Task page

Pages containing tables are provided with width for the columns.

#### Example

- 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 *Oracle Mobile Field Service Implementation Guide*.

## Dependencies

Mobile Field Service - Wireless 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, and Small Form Factor (WAP) devices, see *Oracle Mobile Field Service Applications Compared*, page 1-3.
- To use the Order Part and Parts Search functionality, you must enable the Spares Management application of Oracle Field Service. For detailed information about the Spares Management functionality, see the *Oracle 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*.

## 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.

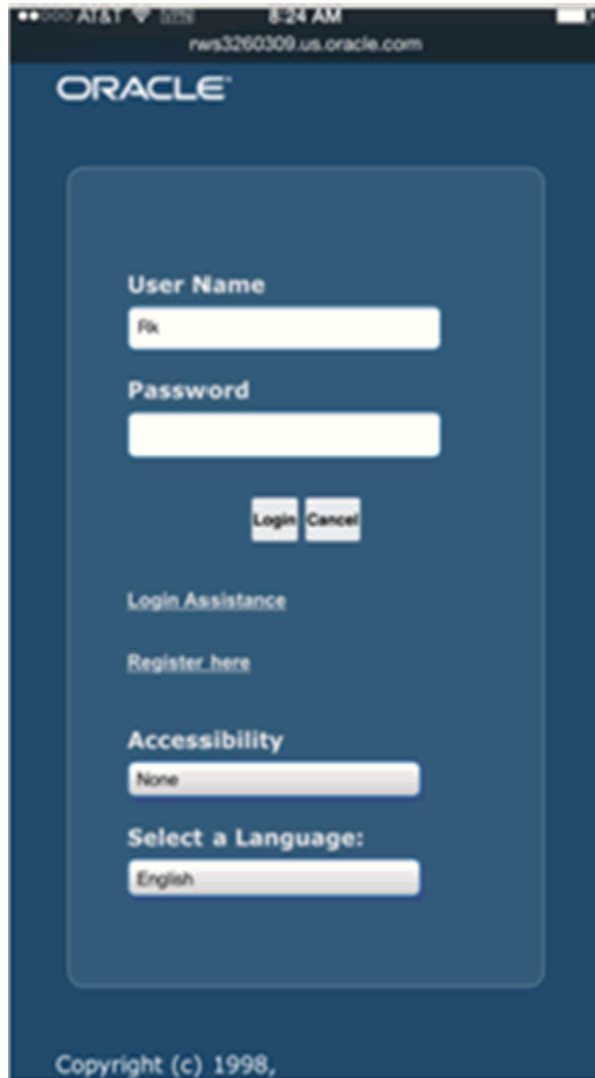
### Example

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

You can use single sign on (SSO) authentication for the Mobile Field Service - Wireless application, for which the authentication will be only once. For information on creating a single sign on, see the *Oracle Mobile Field Service Implementation Guide*.





Once logged in, the technician will view the Home Page based on the CSFW: Home Page profile option, 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](#)
- [Create Service Request](#)
- [Knowledge Base](#)
- [Parts Search](#)

- Receive Parts
- Parts Return
- Transaction History
- Mobile Queries
- Get Direction

Using this link, you can view the driving directions between any two tasks.

- Preferences
- Change Password
- About

Using this link, you can view environment details such as, technician name, responsibility, database name, and browser information.

The Logout button at the top right of the Task List screen returns you 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 technician can view their updated daily schedule.

The next time the technician connects to the network through the wireless device, the notification will appear indicating a change. The technician 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.

## 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 technician.

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. Navigation options are *Next* and *Previous* day. The technician can navigate days in both directions one at a time. 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 technicians 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 technicians can inquire on the task information concerning the selected task. They can change the resolution and the status of the selected task.

- Enter debrief information for the task.

When a field service technician works on a task, they have the ability create a debrief for that task after they have completed part or all of the task duties. A technician can add labor, material, and expense lines to the task, as well as capture counter readings and travel information.

- Capture a customer signature.

Technicians can capture a customer signature during the Debrief process, provided that they are using one of the medium form devices that is supported by Oracle. After a signature is captured during debrief, it is sent to the Field Service Core Debrief application, where it can be viewed as an attachment.

- View service request information.  
Field service technicians can inquire on the request information concerning the selected task.
- Submit the resolution of the task.  
Field service technicians can change the resolution of the selected task and update the problem code. 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.  
If the CSFW: Update Schedulable Task profile is set to Yes, field service technicians can change the assignment status of a selected task, including that of a schedulable task. If the profile is set to No, technicians can only view the 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.

## 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 will be displayed based on the Preferences.

### **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.

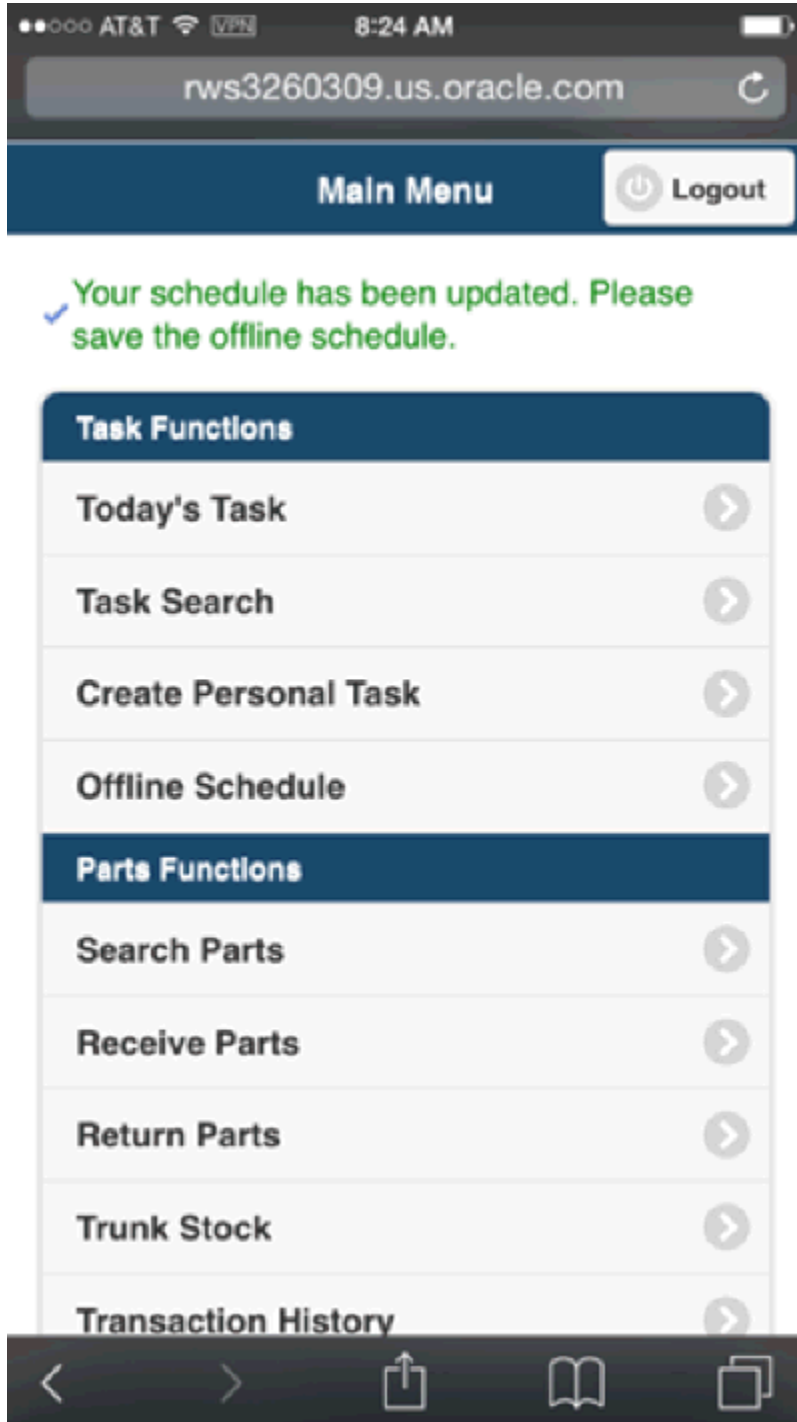
For more information on setting up your home page or setting all Wireless profile options, see the Implementing Mobile Field Service - Wireless chapter in the *Oracle Mobile Field Service Implementation Guide*.

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.

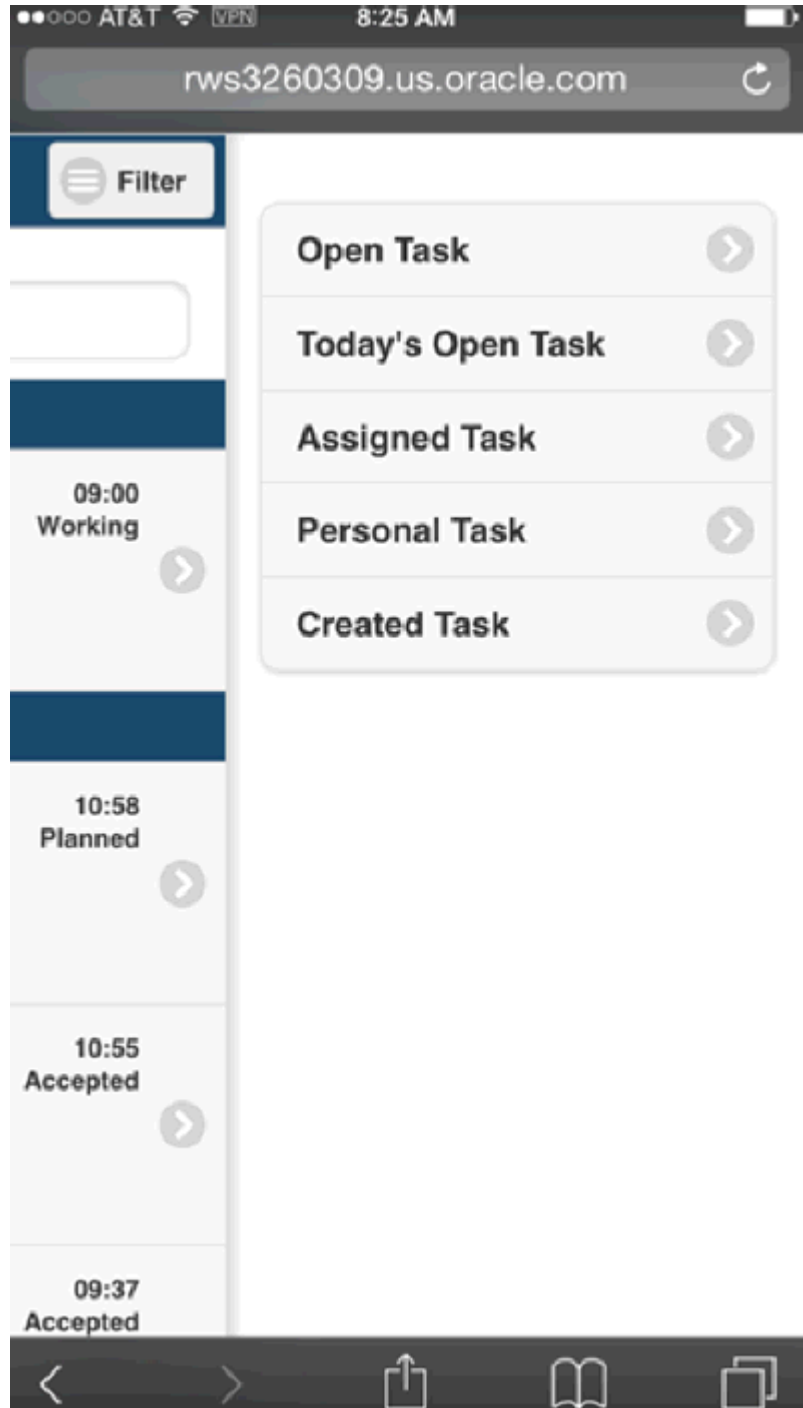


## Prerequisites

- 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 appears 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, access hours, 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.

For each requirement, you can view and change the Address Type, based on which the Ship to address is displayed. The CSP: Parts Requirement Default Ship To Address profile determines the default value of the Ship to Address Type. You can select from any one of the following values:

Customer, Task, Special, Third Party, and Technician Address.

You can select the Ship To Address Type from the list with the following values

- Technician Addresses: All active usable addresses setup in the Addresses tab of the Resource Addresses and Sub-inventories window.
  - Task Address: The incident address displayed for the task from the Service Request.
  - Customer Addresses: Displays all Ship To addresses associated with the customer.
3. If you want to change the task assignment status, in the Status field, select 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.

**Additional Information:** The list of valid statuses that the task can transition to depends on the current task status, responsibility, and task type. For example, the list of statuses for a task type of 'Field Service Repair' is different from a task type of 'Personal'. The list of valid task statuses that can be selected are based on the transition rule that is mapped to the responsibility and task type when Status Transition rules are defined.

4. If you want to add a note to the service request, click the Add notes hypertext link. You can also view existing notes, if any, by clicking the relevant hypertext link.
5. If you want to view service request attachments, click the Attachment icon. The Attachment icon only appears if there are associated attachments.



The Attachment List screen appears displaying the attachment file name, size, and description. If you are launching a laptop or a desktop, then you can have attachments of any file type, such as: .jpeg, .bmp, .doc, .pdf, .xls, .gif, web page, or a short text. Click the attachment name to download and view the attachment.

**Note:** In case of iOS devices, the options of attachments are limited. In iPhone, you can attach only photo or video.

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.

### Task List Screen

The task list screen groups all the tasks based on the scheduled date in descending order. They are color coded based on the status. It offers easy access to the Springboard (which is the Menu icon) and the task views (which is the Filter icon). Field engineers can access additional task filters using the Filter icon to select appropriate task views, such as:

1. Open Task
2. Today's Open Task
3. Assigned Task
4. Personal Task
5. Created Task

### Prerequisites

- A task must be assigned to the technician or a task is created by a technician.

### To Perform a Simple Task Search:

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

The Task Search screen appears.

2. Select a Search For option.

Options are:

- Open Tasks: Lists all the open tasks assigned to the technician.
- Assigned Tasks: Lists all the tasks assigned to the technician either open or closed.
- Personal Tasks: Lists all the personal tasks for the technician.
- Created Tasks: Lists all the tasks created by the technician.

3. Select your task search criteria. You can filter your search for a task by using any of the following criteria that appear on the page:

- Task Number
- Service Request
- Status
- Date
- Customer Name

4. Click OK to perform the search.

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

**Note:** It is also possible to search for a task using Task Assignment Status and the Customer Name in the basic search screen.

The Search Results screen displays a list of all the tasks that match the search requirement. The results that display are dependent on the settings in the CSFW: Task Display 1, 2, and 3 profile options.

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

The Task Details page appears. 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.

### **To Perform an Advanced Task Search:**

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

The Task Search screen appears.

2. Select a Search For option.

Options are:

- Open Tasks
- Assigned Tasks
- Created Tasks

3. Select your task search criteria. You can filter your search for a task by using any of the following criteria that appear on the page:

- Task Number
- Service Request
- Status
- Date
- Customer Name

4. Click the Advanced Task Search icon located at the bottom of the screen.

Advanced search criteria fields appear on the screen and the title of the screen is changed to Advanced Task Search.

5. Select additional search criteria to filter the tasks that you are searching for.

Advanced search criteria are:

- Priority
- Start and End Date range
- Account Number
- Serial Number
- Service Tag
- Item Instance

6. Click OK to perform the search.

The Search Results screen displays a list of all the tasks that match the search requirement. The results that display are dependent on the settings in the CSFW: Task Display 1 and 2 profile options.

## 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 an attachment, adding debrief lines, updating additional task information, updating the scheduled start date and time, and viewing the task details report.

**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, to add notes, and to add attachments.

## Prerequisites

- A task must be assigned to the resource.

### Steps:

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

Main Menu or Springboard > Task Search > Task Details

Main Menu or Springboard > Today's Task > Task Details

The available status values display such as, Completed, Accepted, Rejected, Working, Cancelled. The possible status values that appear are based on the Task Status Transition Rule mapped to the current responsibility and task type. The task type, current task status and responsibility will collectively determine the next status that the task can transition to.

Based on the task assignment status, a color code is displayed on the left hand side of the Task Details pane.

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 as a hypertext link. To capture the counter readings, click the hypertext link and enter the counter reading details. For more information, see Recording Counter Readings, page 6-18

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

The Add Note screen appears.

4. Select the Type of note you are adding from the drop-down list.

For example, Callback, Conversation, Date Change, and so on.

5. Select 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, tap OK.

After the note is added, the Task Details screen is opened again. In the Notes field, you can now look at the note you added by tapping 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, tap the View hypertext link.

The Notes screen appears 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.

10. To add an attachment, scroll to the Attachments region and tap Add in the Service Request field.

The The Service Request: x screen appears.

11. From the LOV, select Attach File, Attach Text, or Attach URL.

For this subflow, assume that you picked Attach File. The Add Attachment: x screen appears.

12. In the Attachment Summary region, enter values for Title, Description, and Category. Browse and select the desired file. Tap OK.

**Note:** If you select a file, the attachment options are limited in iOS devices. In case of an iPhone, you can attach either a photo or a video.

The Add Attachment: x screen reappears.

13. Adjust the title and description if necessary, and tap OK.

The application uses its built-in Wireless server to upload the file to the E-Business Suite Enterprise server.

14. Tap Report in the Task Details screen to view the task report. This report displays service information, task details, debrief information for material, labor, and expense, and duration of the task.

Tap Signature in the Task Details screen to get the customer sign off on the task. If a signature already exists for the task, it is displayed with the date and the customer who signed off the report. Else, you can capture the electronic signature of the customer for completion of the task. You can send a hard copy of the report by printing it or send it by email to the customer.

## Recording Counter Readings

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

Use this procedure to record counter readings.

### Steps:

1. From the Task Details screen, select Counters from the drop-down menu.

The Counter details screen appears displaying 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

As a technician, you have the ability to debrief the task after you perform the job at a customer site. MFS application allows you to add Labor, Material (Install and Return), and Expense lines to the task.

**Add Labor Line:** You can add a labor line to report how much labor time is involved in the completion of a task. You can also enforce mandatory labor debrief by adding business rules to a labor line without which you cannot close the task.

**Add Install Line:** You can report on installed material and recovered items using Material Install. This helps you to plan for the supply of service parts, to maintain the installed base, and to generate an invoice for the materials used. Tapping on the Add Install Line you can create material install lines to a task.

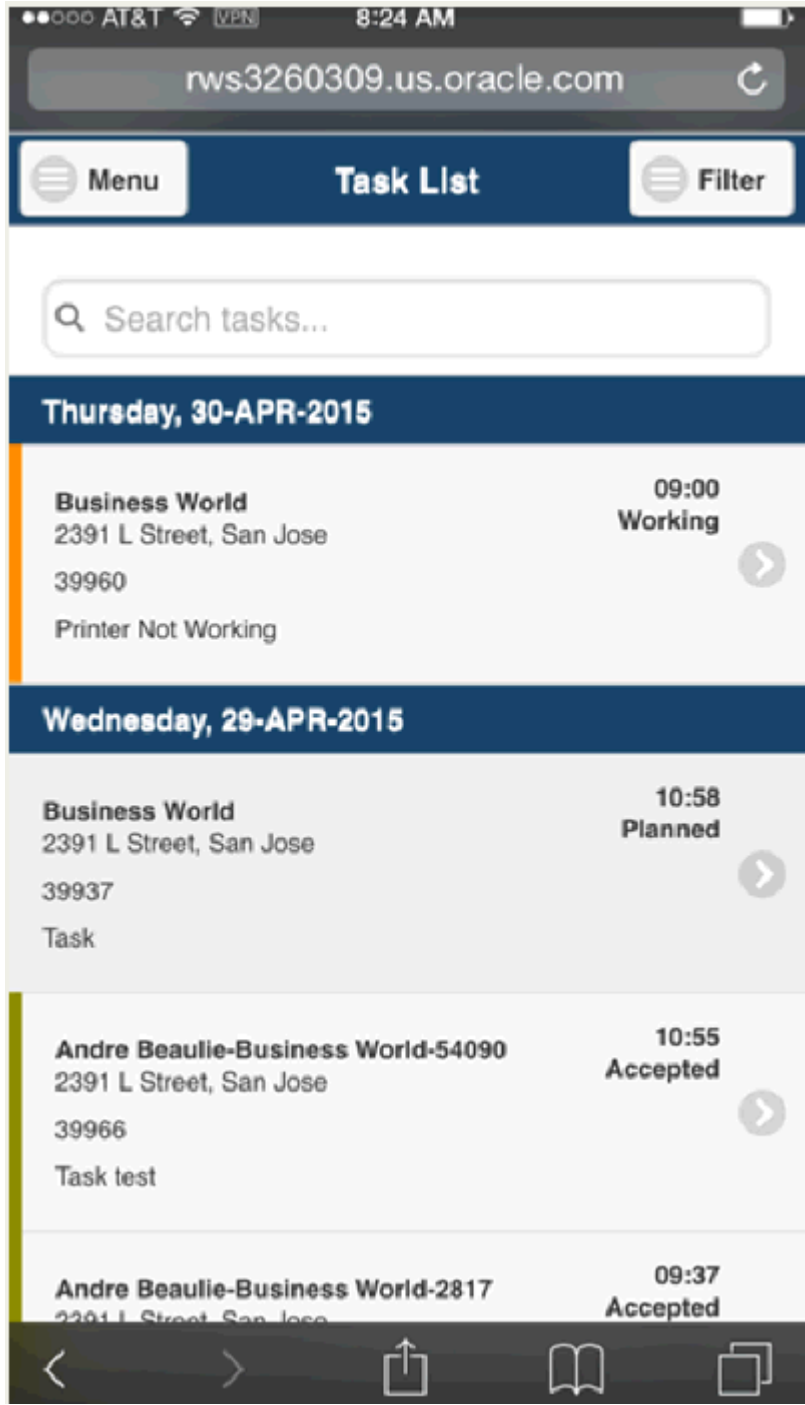
**Add Return Line:** Tapping Add Return Line enables you to create material return line and capture debrief lines when items are removed from the customer site. Such items may be worn out parts or that which has to be retired. You can view, edit, and create material lines.

**Add Expense Line:** Material Expense screen is used to capture all expenses incurred during a task. You can create multiple expense lines for a task. Technicians cannot modify expense lines that have been submitted to Charges, but can add new expense lines for the task, if it is not closed.

## Adding a Labor Line

You can create a labor line to report the labor time involved in the completion of a task. Oracle Mobile Field Service - Wireless enables you to add labor lines regardless of the task status. The application can also enforce mandatory labor debrief by which you cannot complete or close a task until you create a labor line.

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



2. Select Debrief from the list of actions.  
The Debrief screen opens.
3. In the Debrief Header region, click the Labor tab.



4. Tap the Add Labor Line field.

The Add Labor Line region displays the default business process, activity code, and the start and end dates, which can be changed.

For the labor service activity if you select the Update Actuals check box in the Service Activities and Billing Types window or the Service Activity Details page, the actual start and end date on the service request task region is updated based on the labor start and end time.

For a task if there are multiple labor lines with the Update Actuals check box selected, then the actual start and end date on the service request task region is the sum of start and end dates of those lines. In case the task is assigned to multiple resources, then the task duration is calculated as the sum of all the resources' start and end dates.

If you do not want the labor charge line to be calculated based on the actual start and end date specified in the task region, then do not select the Update Actuals check box in the Service Activities and Billing Types window or the Service Activity Details page.

5. Tap the search icon of the Item field and select the labor item.
6. Specify the Start Date and the End date for the labor activity.
7. Specify the Start Time and the End Time for the labor activity. The hour values are depicted in the 24-hour clock format.
8. In the Duration field, enter the amount of labor time required to complete the task.
9. Select the unit of time that describes the labor duration from the UOM list of values.
10. Select the reason that best describes the state of the labor report item from the Reason list of values (optional).
11. Tap the Save button.

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

**Debrief**  
Task: 38358

Cancel Home

Scan Sign Notes(0) Attachments(0) Save All

Post All

✓ Line 2 : Saved successfully

+ Debrief Header

Labor	Install	Return	Expense
+ Add Labor Line			
+ Calibrate 01-AUG-2015 23:59 - 16-AUG-2015 20:00			
- Calibrate 01-AUG-2015 23:59 - 16-AUG-2015 22:00			

✓ Line 2 : Saved successfully

Business Process

Field Service

Activity Code

Calibrate

Item

CHREGLAB1202291994

Start Date(31-DEC-1999)

## Adding an Install Line

When a field service technician works on a task, they have the ability create a debrief for that task after they have 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, Currency, Quantity, and UOM.
- 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 technicians will not be allowed to make such an entry and an error message will appear.

- Material: Usage Type, Item, Quantity, and Sub Inventory.

**Note:** To default all materials associated with a task, use the Parts Assigned icon on the Material Line screen.

The Mobile Field Service - Wireless application enables you to report on parts that you installed at the customer site, parts that you removed or recovered from the customer site for repair or replacement, and excess or defective parts that were not installed. In addition, you can use return routing in debrief to ensure availability in the supply chain where required for more effective utilization of these unused and uninstalled parts.

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.

Plus, the Mobile Field Service - Wireless application enables technicians to capture travel related information for their individual task assignments. Technicians have the ability to capture travel information such as, travel distance and travel time.

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

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 one of the following options from the menu and click Go.
  - **Debrief** - The Debrief summary screen appears. The screen will display the Customer Name and Debrief Number.
  - **Debrief: Assigned Parts** - You can view this menu option only if there are parts requirement for the task. The Material Line screen appears displaying the material debrief details.
  - **Debrief: Barcode Scan** - This option enables technicians to scan serial numbers or item numbers. The Scan Barcode screen appears
3. Optionally, if the Service Request has been resolved, select 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 window in Oracle TeleService and displays in the Resolution Summary section.
5. If you want to update the problem code, select a Problem Code from the drop-down menu and click Save.

Problem codes are set up in Oracle TeleService and are user definable to meet your business needs.
6. If you want to update the problem summary, enter some free form text in the Problem Summary text box.

This information is reflected back on the Service Request window in Oracle TeleService and displays in the Problem Summary section.
7. 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.
8. 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.

9. If you are entering Material line information:

**For Regular Installation:**

Enter the following information:

- Usage Type - The usage type for regular installations is Used.
- Business Process
- Activity Code
- Item
- Description
- Quantity
- Reason
- Date

Based on your setting for the CSF: Enable Return Routing in Debrief profile option, you can enter material debrief lines for parts with a usage type of Used, Unused, or Defective on Arrival. For more information on this profile, see the Oracle Field Service Implementation Guide.

For Used parts, the business process and activity code fields are rendered. If you select Unused or DOA, fields used in return routing are displayed instead. These fields are the destination subinventory and organization, shipping address, and shipment number, waybill number, and carrier. For more information refer to the section For Assigned Parts.

**Note:** If you set up Routing Rules in Spares Management for this return type of excess or defective, the Destination Organization, To Subinventory, and Return Ship to Address fields are displayed.

You can additionally, enter the carrier, waybill number, and shipment number. If routing rules are not defined, the technician's default defective subinventory and organization are populated.

Apart from the Usage Type specific fields, information for other material line fields are populated with the default values for the material item as recorded in Installed Base. These include the item number and description, serial number, default technician usable subinventory, quantity, unit of measurement, service date, operational status, revision, instance, and reason for transaction.

You can add additional material lines by clicking the Add Install Lines option.

**For Assigned Parts:**

Enter the following information:

- Business Process
- Activity Code
- Usage Type - If you select Defective on Arrival (DOA) or Unused as the Usage Type, then enter additional details such as Destination Organization and Destination Subinventory.
- Serial Number - Enter the Serial Number in any of the following ways:
  - **Barcode Scanning:** The Barcode scanner icon is enabled when the cursor is in the Serial Number field. This icon is enabled in the virtual keyboard of the device if a barcode scanner is integrated with the application.
  - **Free Form Entry:** You can enter free form serial number by typing the serial number.
  - **Drop-down LOV:** You can also select the serial number from the LOV.
- Quantity - By default, the quantity displayed is 1. You can change the quantity if the item is not serial controlled.

**For Barcode Scanned Parts:**

Tap the Barcode Scan button to open the Barcode scan screen. This screen enables technicians to scan either an item number or a serial number.

After the scanning process completes, technicians can choose whether they need to Install or Return the scanned parts. The system then validates the serial number or item number. In a single round trip, the system validates the scanned serial numbers or item number against the technician's trunk stock and retrieves the following information:

- Item Number
- Item Description
- On Hand Quantity
- Locator Control (if the item is Locator controlled)
- Lot Control

After the serial number or item number validation is complete, you can edit the following information:

- Usage Type

- If you select Defective on Arrival (DOA) or Unused, then enter additional information including Destination Organization, Destination Subinventory, Waybill Number, and Shipment Number.
- If you select regular install debrief, where the usage type is "Used", then you must enter the information mentioned above excluding Destination Organization and Destination Subinventory.
- Serial Number
- Business Process
- Service Activity Code
  - In case of install type debrief, the default service activity code with line category of "Order" is displayed.
  - In case of return type debrief, the default service activity code with line category of "Return" is displayed.

You can also create a material install debrief line from the Returns screen based on the return item number and serial number. If the item is not serial controlled, then the debrief information is displayed based on the return item number.

10. For a recovered part, additional information displayed include recovered item number, recovered item serial number, recovered instance, and recovered part disposition if applicable. If the profile CSF: Validate Part Replacement in Debrief is set to Yes, then the installed part is validated against the recovered part and if they are same, the CSF: Update Debrief Lines concurrent program posts material debrief information to Oracle Inventory
11. Click Save to save the changes to the debrief line.
12. Click Post to post the debrief line. Click Post All to post all debrief lines.

**Note:** If the part or item is serially tagged and has an Install Base serial number, you can select this serial number from the list of values in the item number field. If no Install Base record exists, you can enter a serial number which creates an Install Base record when you post this debrief line and updates Inventory and the debrief record with the instance number. Technicians can choose to manually post debrief by clicking the Post Debrief icon on the Material Line screen. See figure below. This ensures that irrespective of task completion status, the CSF: Update Debrief Lines concurrent program posts material debrief information to

Oracle Inventory, Install Base, and Charges, and transfer the uninstalled and recovered parts to their routing destinations.

**Note:** For unused parts, the CSF: Update Debrief Lines concurrent program neither updates the Install Base nor creates charges. It merely transfers these parts to the specified destination for better utilization and reduced inventory cost.

13. Alternatively, if entering Expense or Labor lines, click Done when you have filled in the details of the debrief line in Step 7.

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.

## **Adding a Return Line**

A task may require the technician to replace a part at the customer site and install a new replacement part. In this case, then you enter the details of the new replacement part in the Material Install region and the details of the old part that you removed from the customer site in the Material Return region of the Debrief tab.

1. In the Material section - Return, click Add Return Line. This expands the Material - Return line, where the technician can enter information to create a return material line.
2. Select a Business Process.
3. Select a Service Activity code
4. The sub-inventory populates with the default defective sub-inventory of the technician. If the default defective sub-inventory is not set up, then this field is populated with the technician's default usable sub-inventory.
5. Select the Item number by clicking the Search for Item icon.

When you click the Search for Item icon the Search and Select: Item page appears.



Enter the item search criteria and click Go. You can search by Item, Item Description, Subinventory, or Revision.

The system displays the Item field in the Material section, with the one selected on the Search and Select: Item page.

6. The UOM, Operational Status, and Service Date fields default once you select the Item.

7. Enter the quantity for the item returned in the Quantity field.

In the case of serialized items, Quantity is set equal to 1, and the Quantity field is disabled. For nonserialized items, you can change the quantity.

8. Enter the Serial Number, Lot, Locator, Revision, and Instance Number details depending on the item attributes.

The list of values for these fields are validated based upon the item and sub-inventory combination.

**Note:** If the item is serial-tagged, select the item from the list of values or enter a serial number. If you enter a serial number, the debrief posting program updates the Install Base instance accordingly.

9. (Optional) Select a Reason for the material transaction from the list of values.
10. Select the Return Reason from the list of values.
11. Click Apply. The material line is saved.

## Adding an Expense Line

Material Expenses can be your travel expenses, Hotel accommodation, and other miscellaneous expenses that you incur during the case progression. Technicians can add new expense lines for the task as long as the task assignment status is not Closed, but cannot modify expense lines that have been submitted to Charges.

### To create expense lines:

1. Navigate to the Debrief screen by tapping Debrief menu present in the Task Details screen.
2. Tap the Expense tab.
3. Tap the Add Expense Line menu.
4. Enter your expense item or select the item using Search and Find icon in the Item

field.

5. Enter expense amount.

The value in the Currency field defaults to the currency set in the profile option, JTF\_PROFILE\_DEFAULT\_CURRENCY. Optionally you can change the value.

6. Tap the Save icon to save the expense line.
7. You may delete the saved debrief lines by tapping Delete icon. Delete option is available in the Action menu. Delete is not allowed once the task is completed.

## Capturing Customer Signature

The Mobile Field Service - Wireless application enables you to capture a customer signature during the Debrief process on device browsers supporting HTML5. 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 view the signature as a Debrief attachment.

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

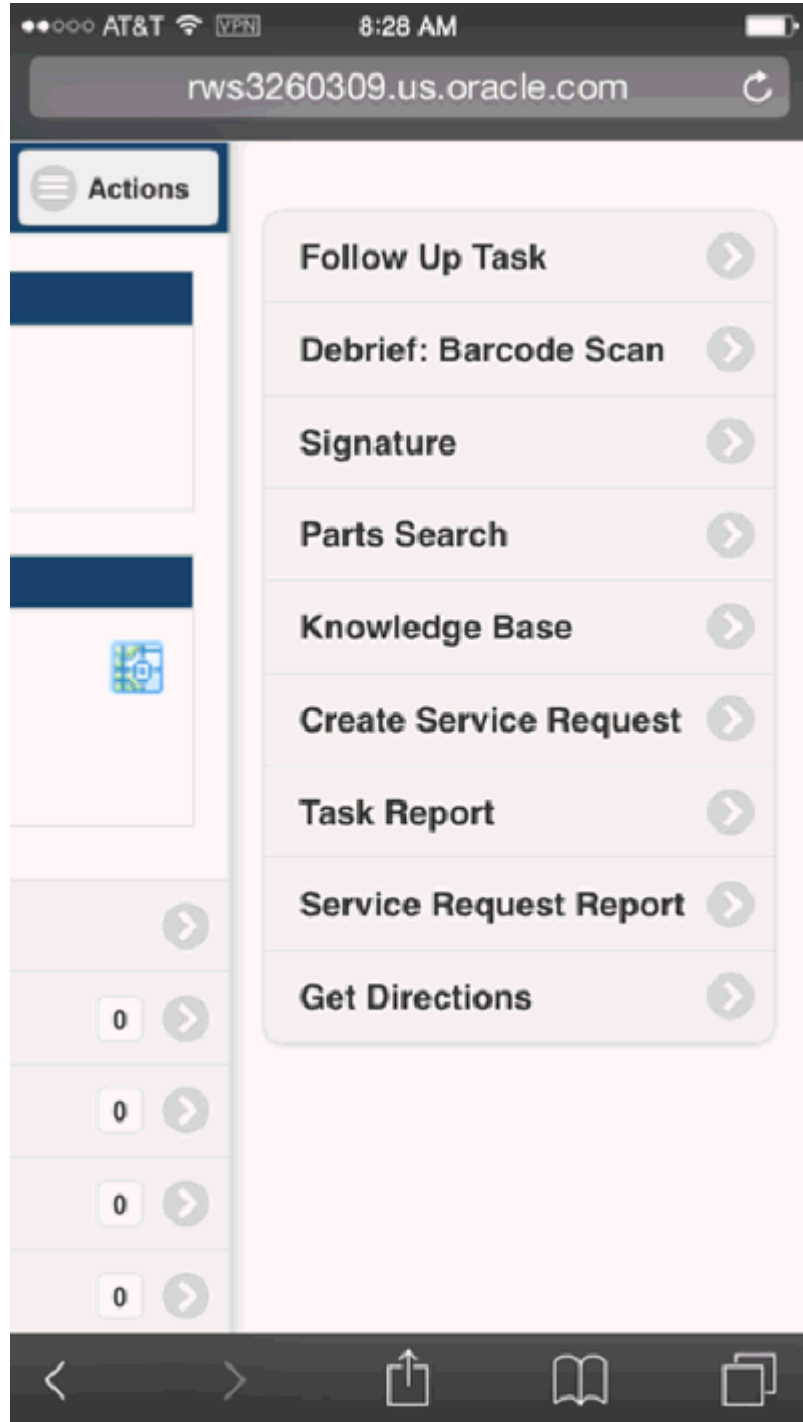
PDA Device Name	Specifications
Palm Devices with Symbol Client (i.e. SPT-17xx, SPT-18xx)	Web client browser is required on the device to support signature capture.
Pocket PC 2002 or higher	Requires Pocket IE browser.

## Generating Field Service Report and Capturing Signature

You may review your action summary using the Field Service Report after capturing the required details for a task. The Report provides a high level summary of all the required information and helps you to be certain that you have all the necessary information captured before you present it to the customer for a signature, which the customer reviews and signs. You can then generate a PDF version of the report.

### To generate field service report and capture signature

1. Navigate to the Task List screen and tap the desired task.  
Main Menu or Springboard > Task List
2. Tap the Actions menu present on the top right side of the Task Details screen.



3. From the list of Context Actions menu that drops down tap Signature.
4. Enter the signature in the Signature text field.
5. Enter the name of the customer in the Name field.

- Tap the Save icon.

The signature is saved with the assigned task number. You can also see the name of the customer and the date on which the document was signed on the top of the screen.

- Tap the Task Report from the Actions menu.

The Service Request PDF window appears. You can either save the report or open with Adobe Acrobat to view the report.

## Field Service Report

Service Request: 61982	Customer Name: Business World
Request Type: Break/Fix Repair	Customer Number: 2813
Incident Date: 13-MAY-2014 20:39	Account: 1608
Creation Date: 13-MAY-2014 20:40	Address: 2391 L Street SAN JOSE, CA 95106
Last Update Date: 17-AUG-2015 04:29	Site Name:
Contract Type:	Country: US
Tag:	Requested By:
Serial Number:	Phone:
Counter:	Email:
Purchase Order:	
Item Number:	
Description:	

### Summary

task

### Task Number: 38358

Subject: task  
 Address: 2391 L Street SAN JOSE, CA 95106  
 Resource: Bramer, Fred  
 Type: Field Service Repair  
 Task Priority: High

### Time

Service Activity	Labor Item	Description	Start Time	End Time	Duration	UOM	Reason
Calibrate	CHREGLAB 1202125248	Charges Regular Labor Item	01-AUG-2015 23:59	16-AUG-2015 20:00	356.0167	HR	Labor - Fix
Calibrate	CHREGLAB 1202291994	Charges Regular Labor Item	01-AUG-2015 23:59	16-AUG-2015 22:00	358.0167	HR	Labor - Recall

### Task Number: 38358

Subject: task  
 Address: 2391 L Street SAN JOSE, CA 95106  
 Resource: Bramer, Fred  
 Type: Field Service Repair  
 Task Priority: High

### Time

Service Activity	Labor Item	Description	Start Time	End Time	Duration	UOM	Reason
Calibrate	CHREGLAB 1202125248	Charges Regular Labor Item	01-AUG-2015 23:59	16-AUG-2015 20:00	356.0167	HR	Labor - Fix
Calibrate	CHREGLAB 1202291994	Charges Regular Labor Item	01-AUG-2015 23:59	16-AUG-2015 22:00	358.0167	HR	Labor - Recall

James  
 Customer Name

  
 Customer Signature

18-AUG-2015 02:39  
 Date

## Creating a Service Request

One of the advantages that the Oracle Mobile Field Service - Wireless application offers a field service operation is the ability to 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:

- The Create Service Request option in the drop-down menu of the Task Details screen, as documented in the following procedure, or
- The main menu. See *Creating a Service Request from the Main Menu*, page 6-34.

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 Oracle 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 be scheduled, either manually or through the Oracle Advanced Scheduler.

The technician also has the following options to schedule and assign the tasks:

- Done
- Work On It
- Self Schedule
- Windows to Promise
- Intelligent

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 screen, select Create Service Request from the drop-down menu at the bottom of the screen.

Main Menu or Springboard > Task Search > Task Details > Create Service Request option from drop-down menu > Create Service Request

The Create Service Request screen appears and the customer name and address from the existing service request that you were working on appear by default. The Type, Status and Severity fields also appear by default, but you can change the values, if necessary.

2. Enter a Summary of the problem for which you are creating the service request.
3. Select an Item, if necessary to associate with the service request.
4. If the item is serialized, select a Serial Number.
5. Select an Item Instance, if applicable.
6. Select a Service Tag, if applicable.
7. Click OK to create the service request.

At this point you will receive a service request number and a message that the service request was successfully created. The request number screen appears and, at this point, you can add Notes to the service request or you can add a Task.

8. To add Notes, click the Add hypertext link at the Notes field.
9. In the Notes screen, select the 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.
10. To create a task for the service request, click the Add link at the New Task field.

The Create Task screen appears which is exactly the same as the screen used to create a follow-up task. See *Creating a Follow-Up Task*, page 6-35 for details.

11. 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 select from among all the customers 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 Creating Service Requests and Field Service Tasks chapter of the *Oracle Field Service User Guide*.

The task and assignment status LOV will display the initial statuses defined for the selected task type and current responsibility. The user can then choose from a list of valid initial task statuses for task creation. By default, the field will display the initial status that has been selected as the default status for that task type and/or responsibility.

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

### Prerequisites

- A task must be assigned to the resource.

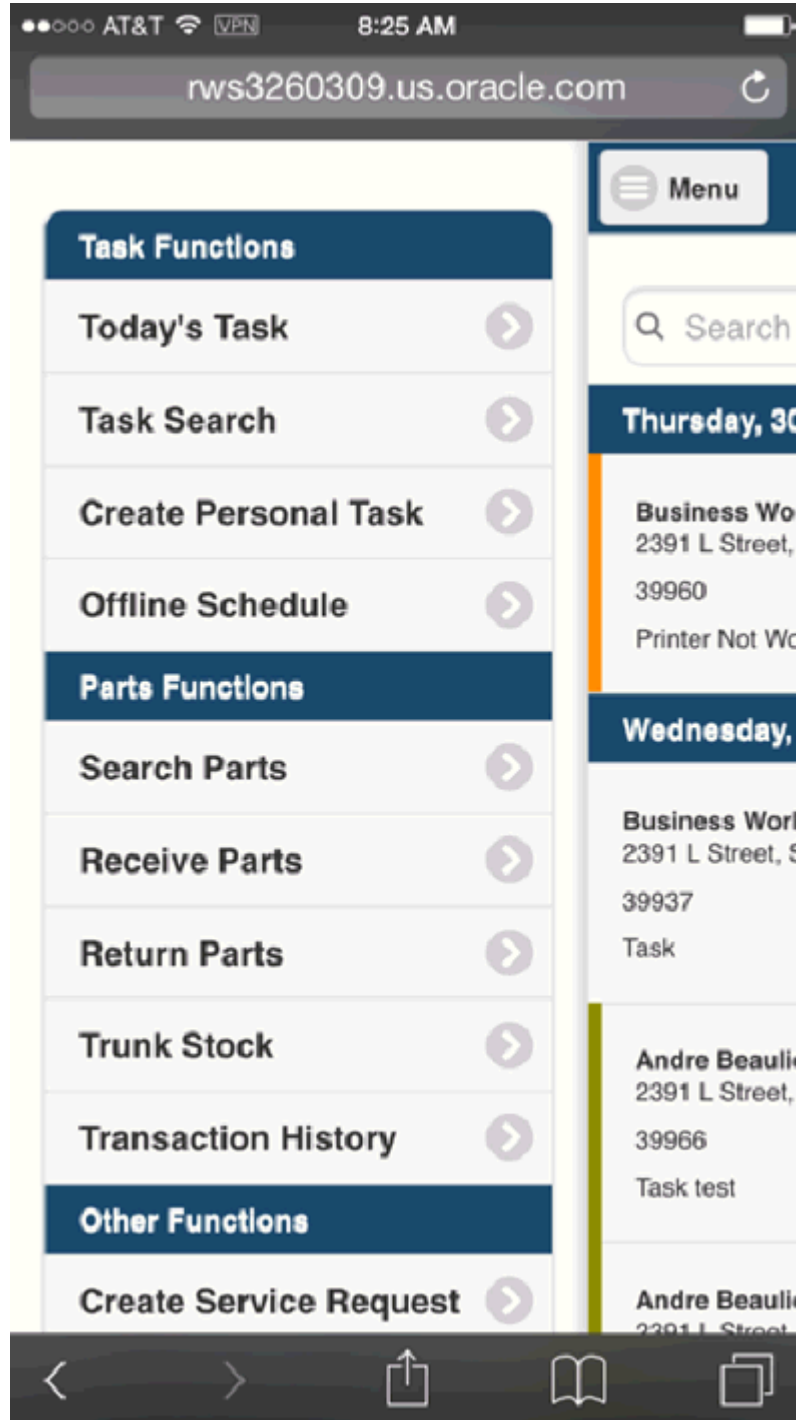
**Steps:**

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 or Springboard > Task Search > Task Details

Main Menu or Springboard > 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 appears 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. From the Task Owner Type LOV, select either Employee Resource or Group Resource. When Employee Resource is selected, the Name field LOV displays all valid resources. When Group Resource is selected, all valid resource groups that have Usage defined as "Support" are displayed.
5. By default, the resource name defaults from the owner of the parent task. Use the LOV to change the value as required.
6. Select a Planned Start Date for the task. You can perform this step by clicking Pick.
7. Enter a Planned Start Time.
8. Select a Planned End Date.
9. Enter a Planned End Time.
10. Enter the Planned Effort for the task.
11. If you want to copy the parts requirement from the original task, select the Yes radio button at the Copy Requirements field.
12. If you have any notes to add, enter them in the Notes field.
13. 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.

## Understanding Scheduling Tasks

Technicians can schedule tasks and follow-up on tasks from wireless PDA devices. The access level for the technician in the wireless device for the scheduling and assignment of a task depends on the value of the profile option CSFW: Technician Schedulable Options. Possible values for this profile option are:

- Work on it
- Self Schedule
- Window to Promise (Default)
- Intelligent

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 select 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 6-39.

- **Self Schedule:** Self-assign and start work at a later date.

Technicians can select the Self Schedule option if the technician cannot begin work on the created task or follow-up task right away, and wants to come back later 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 6-42.

- **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 6-43.

- **Intelligent:** Use the Intelligent option to assign a task to a resource based on selected criteria. This option requires Advanced Scheduler to be implemented.

See Using the Intelligent Mode to Schedule Tasks, page 6-45.

## 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 6-33 or Creating a Service Request from the Main Menu, page 6-34.
- A task or follow-up task must exist. See Creating a Follow-Up Task, page 6-35.

### Steps:

1. Select a task from the Today's Tasks list.

See Viewing Today's Tasks, page 6-9.

2. Select the Work On It option from the drop down menu, and then tap OK.

The task is assigned to the technician and the technician can begin to 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".

✓ The task has been updated to Working

**Task Details**

Status [Working](#)  
Subject task  
Scheduled [13-MAY-2014 20:42](#)  
Start  
Planned Effort 2.0 HR  
Priority High

**Service Request Details**

**Business World**  
2391 L Street  
San Jose, CA 95106



**Service Request** 61982  
task

**Parts Required** 1 >

**Labor Debrief** 0 >

**Install Debrief** 0 >

**Return Debrief** 0 >

**Expense Debrief** 0 >

**Debrief: Assigned Parts** >

## 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 6-33 or *Creating a Service Request from the Main Menu*, page 6-34.
- A task or follow-up task must exist. See *Creating a Follow-Up Task*, page 6-35.

### Steps:

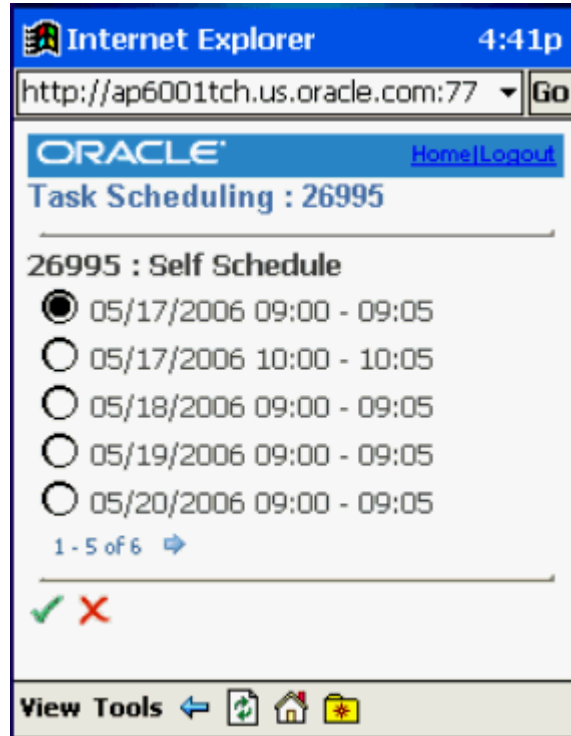
1. Select a task from the Today's Tasks list.  
See *Viewing Today's Tasks*, page 6-9.
2. Select the Self Schedule option from the drop down menu, and then tap OK.

**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 6-13.

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. After 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 Assigned 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 6-33 or *Creating a Service Request from the Main Menu*, page 6-34.

- A task or follow-up task must exist. See *Creating a Follow-Up Task*, page 6-35.

**Steps:**

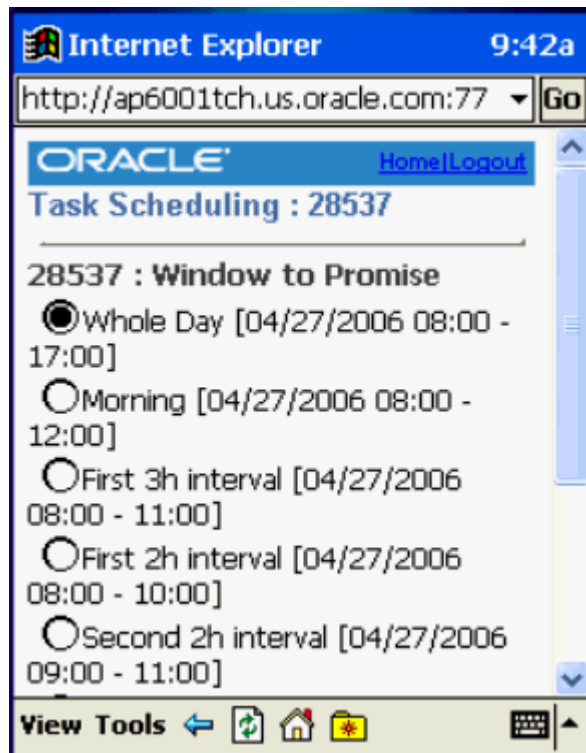
1. Select a task from the Today's Tasks list.  
See *Viewing Today's Tasks*, page 6-9.
2. Select the Window to Promise option from the drop down menu, and then tap OK.

**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 6-13.

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. After 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*.

The access level for the technicians in the wireless device for the scheduling and assignment of a task depends on the value of the profile option: CSFW: Technicians Schedulable Options. Possible values are:

- Work on it
- Self Schedule
- Window to Promise (Default)

If Level 3 is set (Window to Promise) all three options having same or lesser level are allowed.

## Using the Intelligent Mode to Schedule Tasks

In this option, the technician selects from the scheduling options provided by the system.

Use this procedure to schedule a task with the intelligent mode:

### Prerequisites

- Advanced Scheduler must be implemented.
- A service request must exist. See *Creating a Service Request*, page 6-33 or *Creating a Service Request from the Main Menu*, page 6-34.
- A task or follow-up task must exist. See *Creating a Follow-Up Task*, page 6-35.

### Steps:

1. Select a task from the Today's Tasks list.  
See *Viewing Today's Tasks*, page 6-9.
2. Select the Intelligent 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 6-13.

Selecting the Intelligent option provides the you and customers with several

windows of technician and 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. After 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*.

The access level for the technicians in the wireless device for the scheduling and assignment of a task depends on the value of the profile option: CSFW: Technicians Schedulable Options. Possible values are:

- Work on it
- Self Schedule
- Window to Promise (Default)

If Level 3 is set (Window to Promise) all three options having same or lesser level are allowed.

## Creating a Personal task

A *personal task* is a notice to the dispatcher that a technician will not be available for a particular period. Personal time for appointments, meetings, training, and vacations can be reserved to prevent task assignments during that time. For example, if a technician needs to go to the dentist next week, they can create a personal task stating that they will be unavailable to perform service tasks for a certain period.

By knowing the availability, the dispatcher can schedule the technician's tasks more effectively.

Use this procedure to create a personal task:

Oracle Mobile Field Service Wireless creates a personal task and then returns you to the Main Menu. The personal task that you create will be visible in the list of tasks. You can click the task number to update it or if you know the task number, you can also search for it in the Search Task screen to open it.

1. Navigate to the Main Menu.
2. Click the **Create Personal Task** link on the Main Menu. The Create Personal Task page appears. If your home page is either "Today's Task" or "All Open Tasks", click the **Personal Task link** in the Action menu in the task list.

3. Enter the subject for the personal task.
4. Select the task type. If the *CSF: Default Task Type for Personal Tasks* profile option is set, the value for the task type is displayed by default. This LOV lists task types that have the **Private** check box enabled.
5. Select a status for the personal task. The task and assignment status LOV will display the initial statuses defined for the selected task type and current responsibility. The user can then choose from a list of valid initial task statuses for task creation. By default, the field will display the initial status that has been selected as the default status for that task type and/or responsibility.
6. Select a priority for the personal task.
7. Enter the planned start and end dates and time for the personal task.
8. The planned effort for the personal task is automatically calculated based on the start and end dates.
9. Select the UOM for the effort.
10. (Optional) Select the Address Type for the task. Addresses can either be a technician or a one-time address.
11. Enter the address details if you select One-time as the address type. In case you select Technician as the address type, then you must select a value from the LOV.
12. Enter a description for the task.
13. Click **Apply**.

## Viewing Install Base Product Configuration

The Oracle Mobile Field Service - Wireless application integrates with Oracle Install Base to provide the install base configuration for an instance, against which a service request was initially logged.

Oracle 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 enables 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's 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 or Springboard > Task Search > Task Details

Main Menu or Springboard > Today's Task > Task Details

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

The Service Request screen appears.

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

The IB Configuration screen for the selected item appears. 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.

## Viewing and Scheduling Unassigned/Assigned Tasks (Decentralized Scheduling)


Mobile Field Service Wireless application enables field engineers to view and schedule unassigned tasks that belong to their group from the technician dashboard in addition to viewing only those tasks that are assigned to them. This functionality enhances a technician's productivity by taking up additional work after completing the work assigned to them. Additionally, this allows them to view tasks of other technicians (co-workers) who are members of the group. Two task search options such as Group Unassigned Tasks and Group Assigned Tasks in Task Search screen help in effective assignment of tasks. To enable this feature, you must add two new function securities such as `SHOW_GROUP_UNASSIGN_TASKS` and `SHOW_GROUP_OTHER_TECH_OPEN_TASKS` to the appropriate responsibility. These functional securities allow the field technicians to view assigned and unassigned tasks that belong to their group. Therefore it also reduces the Field Dispatchers work load substantially.

You can access this feature from the Task Search screen in the Home screen or Springboard. You have two additional options in the Search By field of the Task search screen. They are:

- *Group Unassigned Tasks*: Displays all tasks that are assigned to your group but no resources are assigned yet.
- *Group Assigned Tasks*: Displays all tasks that are assigned to your group members but the work is not commenced yet.

### To schedule unassigned tasks or reassign group tasks

1. Navigate to the Task Search screen in the Home screen or Springboard.
2. Select the Group Unassigned Tasks option. The screen displays all unassigned tasks in your group.

<b>Search For</b>	Group Unassigned Task
<b>Task Number</b>	Open Tasks
<b>Service Request</b>	Assigned Tasks
	Created Tasks
	Personal Tasks
	<b>Group Unassigned Tasks</b>
	Group Assigned Tasks
<b>Status</b>	
<b>Date</b> (31-DEC-1999)	<input type="text"/> 
<b>Customer Name</b>	<input type="text"/>



3. Tap the task record to open the task details.
4. Tap Assignee field to schedule the task.

You can schedule the task to yourself or you can launch the scheduler in your instance to find a suitable resource. Based on the settings for the profile CSFW: Technicians Schedulable Options, the following scheduling options are displayed:

1. Work On It - Allows the technician to assign an unassigned task to self or reassign a task that has been assigned to a co-worker to self. The task will be assigned to the technician with Scheduled Start Date populated with SYSDATE.
  2. Self Schedule - Allows the technician to invoke Scheduler and schedule the task to self.
  3. Intelligent - Allows the technician to invoke the Intelligent scheduling mode for task assignment/reassignment.
  4. Window To Promise - Allows the technician to invoke the Window-to-Promise scheduling mode for task assignment/reassignment.
5. You can update the schedule start and end date manually after assigning the task to self.
  6. To reassign a group task, select the Group Assigned Tasks option. The screen displays tasks currently assigned to your team members. Follow steps 3-5 to reassign the task to self.

## Making Mobile Queries

After administrators define queries and download them to local devices, you can select one of the predefined queries, enter variables, and submit it to the enterprise for execution. After enterprise processing, results appear in your screen.

Complete the following steps to prepare, submit, and view a query.

### Prerequisites

- An administrator must have created and downloaded one or more predefined queries.

### Steps:

1. Tap the Mobile Query icon in the icon region.  
The Mobile Queries screen appears.

2. Either tap a seeded query from the Query List LOV or tap an already saved query from the Query Name field.
3. Advance to the next screen, Submit Mobile Query.  
A detailed description of the selected query appears in the Desc field. Then the cursor moves to the first query variable required.
4. Enter values for query variables until no more are required.
5. Tap the send icon to transmit your query.  
When the enterprise has responded, a message appears in the Mobile Query Instances screen that says that a reply is available.
6. Tap the reply to display it in the mobile query results screen.

## Performing a Parts Search

The ability to find parts quickly is a critical element of a successful field service operation. The Oracle Mobile Field Service - Wireless 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.

After 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.

## 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 items 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 geo-code 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 procedures to perform a parts search.

## Prerequisites

- You must have ATP functionality enabled in Advanced Supply Chain Planning.
- You must set the profile CSP: Part Search Method at the Application level by selecting for the Application level a value of ATP, Inventory, or Spares Supply Chain. 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.

### To Set Search Preferences:

1. Navigate to the Technician Search preferences screen:  
Main Menu or Springboard > Technician Search Preferences
2. In the Distance field, enter the maximum distance from your location to perform the search. If you enter no value, the distance defaults to the value of the Max Distance profile.
3. Use the following table to indicate your preferences.

Label	Action
My Inventory	If this box is selected, search results will include your own inventory.

Label	Action
Other Technicians	If this box is selected, search results will include the inventory of other technicians.
Manned Warehouses	If this box is selected, search results will include the inventory of manned warehouses that are open.
Alternate Parts	If this box is selected, search results will include the inventory of supersessions and substitute parts. Alternate parts will appear in the search results in blue font.
Include Closed	If this box is selected, search results will include the inventory of closed stocking sites for both warehouses and technicians. Closed stocking sites in the search results will appear in red font.
Ship Set	If this box is selected, search results will include only the stocking sites that have all parts required.

4. Tap Go to save your preferences.

### To Perform a Part Search:

1. Navigate to the Part Search screen.
  - Main Menu or Springboard > Part Search
  - Main Menu or Springboard > Task Search > Task Details > Part Search

The Parts Search screen appears with your default search preferences applied. You can change them as required. If you came from the Task Details screen, then your task information is also carried forward here.

**Note:** The Part Search option in the Task Details screen is based on the selected task type. This option is displayed if this option is enabled for the selected task type.

2. Select the Item number, of the item you want to find.  
The item description appears by default.

3. Enter the Quantity of the item you need. The quantity of 1 appears by default.
4. Tap **Add another item** to add the item to the Items Entered list and to start the definition of another item.
5. Enter a value for Need Date/Time.  
If you launched this screen from the Task Details screen, then enter the scheduled start date and time of the task or the current date and time, whichever is later. Otherwise enter the current date and time.
6. Enter locational or positional information.  
Distance represents the radius for the search from the Ship to Address or, if selected, your current address. Your current address is defined by the current task or GPS.  
Address Type can be a task address, a technician address, or a customer address.
7. Select the sources in which you want to search for the item by selecting the appropriate check boxes.  
The options are the same as those that you had when you defined your search preferences, and those preferences appear here by default.
8. If this screen shows a task associated with this search and you want to create a parts requirement for the parts and quantities listed, then tap Part Requirement.  
The part requirement number appears on this screen.
9. Click Search to begin the search.  
The Search Results screen appears and displays which stocking sites have the items based on the search parameters, distance, and address selected.

### **To Perform an On Hand Quantity Part Search:**

1. Select the Item number of the item you want to search for.  
**Note:** Item is the only field required when performing an on hand quantity search.
2. Enter an item Revision number, if applicable. The Revision number field will not appear if the item has no revisions.
3. Select the On Hand option.

**Note:** The other search criteria fields (Include Alternate Parts,

Quantity, and Warehouse, My subinventories, and My co-workers check boxes) that appear on the screen do not pertain to the on hand quantity search.

4. Click Search to begin the search.

The Search Results screen displays all the on hand quantities for locations based on the information in the Planner's Desktop. The results screen displays the Location and for that location the On Hand Good quantity and On Hand Bad quantity.

For information on the Planner's Desktop, see the *Oracle Spares Management User Guide*.

## Creating a Parts Requirement

Complete the following steps to order a part:

1. On the Task Details screen, click Parts Search.

**Note:** The Part Search option in the Task Details screen is based on the selected task type. This option is displayed if this option is enabled for the selected task type.

2. Select the address type from the drop-down list. You can select the task address, technician's address, customer address, or special address as the address type. If you select the Special Address option, then enter the address information in the Special Address page.

3. Enter the Ship to address.

4. Select the desired part from the table.

If you know the information for a specific part, you can enter this in the Item field.

The part you select appears in the New Order screen.

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

5. Click 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.

The CSP: Initial Status of Internal Order profile determines the initial status of the parts order when the order is created in the Scheduler process. If the technician

accepts the task, the status of the order changes from Entered to Booked.

6. Click OK in the prompt.

The part you selected is added to the part order and appears under the Parts Requirement region.

7. Tap the Receive option to display the Receive Parts screen, In the Receive Parts screen, tap the Receive option to receive parts for all orders created for the task. For more information on receiving parts, see Receiving Parts, page 6-61.

## Ordering Parts

Using the Mobile Field Service - Wireless application, you 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 Spares Management application. The ordering process is closely integrated with the search process and automates the creation of the appropriate type of order.

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.

You can create an order from the search results and the order type will be automatically selected based on the Ship From and Ship To inventory organizations and with the source as a warehouse or another technician.

The search results are used to select the source and create either an order or a reservation. The following order type alternatives are used:

- Move order
- Internal order
- Inter-org transfer
- Sub-inventory transfer

The following variables determine the order type for the parts search and ordering:

- Technician or warehouse
- Manned or unmanned warehouse
- Source organization same as or different than destination organization
- In-transit required between source and destination

Use the following procedure to order parts through the Mobile Field Service - Wireless

application:

## Prerequisites

- 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.

### To order a part:

1. Search for the desired part and navigate to the Search Results screen. For details on doing this, see "To Perform a Search."

The Search Results screen displays which stocking sites have the items based on the search parameters, distance, and address selected.

**Additional Information:** If a stocking source is closed, then it appears in red font. If a stocking source is a supersession or substitute, then it appears in parentheses.

2. Tap the hyperlink for a stocking site to see its details on the Stocking Site Details screen. This screen displays the site details including the address, work hours, contact details, and the shipping details including ship to contact and the shipping method.
3. Tap Done to return to the Search Results screen.
4. Select the check box for the source and item that you want to use.
5. Tap Order.

The application determines the appropriate order type and generates it.

**Additional Information:** Note: The Follow-Up Task button is optionally available on this screen by using security functionality. Tapping Follow-Up Task creates a follow-up task and parts requirement if a parts requirement was not previously created. See "Creating a Follow-Up Task" for more information.

## 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, they can create a move order to fill this request.

**Note:** To create a move order, the coworker's sub-inventory must 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 appears. This includes the resource name and phone number, the source sub-inventory and the quantity of parts.

3. In the Destination field, select 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 selecting 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.

The profile CSP: Initial Status of Booked Order is used to determine the initial status of the parts order when the internal order is created in Field Service – Wireless after searching for the required part.

### 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 appears. 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, select 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. Select a Need By Date for the parts.

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

This is a 24-hour 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.

## Receiving Parts

You initiate the receiving process in the Inbound Orders and Reservations screen. You can also use this screen to initiate a view of an order or reservation.

### To Receive Parts:

1. Navigate to
  - Main Menu, then click Receive Parts. This displays the Inbound Orders and Reservations screen. This screen lists all your open orders and reservations. Reservations are used to receive sub-inventory transfers and inter organization transfers, or
  - Task Details screen, then select Receive Parts from the context sensitive actions list. This displays the inbound orders and reservations for the selected task.

This screen shows a list of all your open orders and reservations. Reservations are used to receive sub-inventory transfers and inter organization transfers.

2. Select the type of order from the Orders list. The order may be of type **Parts Requirement Orders** or **Purchase and Internal Orders**. Parts Requirement Orders lists reservations and internal orders associated with the parts requirement. Purchase and Internal Orders lists orders that are not associated with parts requirement.
3. Select a single order or reservation to view or receive.
4. Tap View to view the order or reservation.  
The Inbound Order screen appears.
5. Select the check box of the order lines whose balance due you want to cancel. A check box is disabled if a shipment is in transit.
6. Tap Apply to cancel the balance due on the selected order lines.
7. Tap Back to return to the Inbound Orders and Reservations screen.
8. Select the check box of any single order or reservation that you want to receive and tap Receive.

The Receive Parts screen appears. You use it to transact receipts from suppliers and other inventory locations. You can also use it to close orders short and cancel

reservations.

This screen shows a list of all lines on the shipment, order, or reservation. Use this screen to enter actual quantities received when they are different from the shipment quantity or order quantity. Over shipments consistent with receiving rules for your organization are supported.

If an item is received that is not on the shipment and is not serialized, then report the situation to the dispatcher, logistics coordinator, analyst, or other designated user who will reconcile your inventory with the source inventory location. Ultimately both locations require stock adjustment transactions.

9. If you want a value for Sub-Inventory that is different from the default, then select it from the LOV.
10. Optionally, select a shipment to receive if there is more than one.
11. Enter a value for Receive Quantity if it is different from the default.
12. Select the Close Short check box to cancel the balance due on a line. A check box is disabled if a shipment is in transit.
13. Tap Receive.

If no serial controlled part has been received, then the application processes the receive transaction and displays a receiver number at the top of screen. If a serial controlled part has been received, then the Receive - Serial Numbers screen appears for further steps.

14. Enter or scan the serial numbers received.

**Important:** When a serial number is received that is not in the shipment, then the following message appears on the screen: "Serial number not in shipment." When you encounter this message, you cannot receive the invalid serial number until the serial number discrepancy is resolved. Return to the previous screen, change the quantity received, return to the Receive - Serial Numbers screen, and receive the valid serial number.

15. Tap Next.

The application transacts the receipt, returns to the Receive Parts screen, and displays the receiver number at the top of the screen.

## Returning Parts

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. You can view the excess list information such as, item number, unit of measure, sub inventory, and condition type.

Spares Management return routing rules are used to display the destination for excess return in the Mobile Field Service -Wireless application. A parts return routing rule is defined by a source, a routing parameter, and a destination.

Refer to the Overview: Parts Return section in the *Oracle Spares Management User Guide* for more information.

Mobile Field Service - Wireless displays the excess parts list on a medium screen form. The technician will be able to invoke the excess parts list by clicking the Excess Returns link from the main menu.

The following information displays on the Excess Return screen:

- 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.

The return to organization and subinventories are populated from the Resource Addresses and Subinventories window in Oracle Spares Management or the shipping network setup in the Oracle Inventory.

- Excess quantity: This is 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 the scheduled Create Excess List 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 return parts:

## Prerequisites

- You must have Oracle Spares Management fully implemented.

### To Return Parts with a Consolidated Shipment:

1. From the Main Menu, tap Parts Returns.

Main Menu or Springboard > Parts Return

The Parts Return screen appears. This screen displays all the sub-inventories assigned to you and all the parts contained in each of these sub-inventories. The

title area of the screen includes the date that the return list was created.

You use this page to initiate excess or defective returns by selecting a source sub-inventory. You can also select the consolidation option, which provides for multiple parts and quantities to be included in a single shipment. When the consolidation option is not selected, each piece will be a single shipment. This example flow uses the consolidation option.

2. Select a sub-inventory from the Source LOV.

3. Select the Consolidation check box.

Selecting this option means that multiple pieces will be included in the shipment.

The Part Details screen appears when there is only one destination, or the screen with a Destination Summary appears if there is more than one destination.

4. In the Return Quantity field, enter the actual quantity of an item to be returned if it is different from the recommended quantity.

5. Tap Next.

If an item is serialized, then the Parts Return - Serial Numbers screen appears. If the item is not serialized, then the Parts Return - Create Order screen appears.

6. If the Parts Return - Serial Numbers screen appears, then enter or scan the serial number for each item.

**Additional Information:** If you enter a serial number that is not in the inventory balance, then the following message appears at the bottom of the screen: "Serial number not in inventory." When you encounter this message, the invalid serial number cannot be shipped until the discrepancy has been resolved. If there is a partial quantity on the part, then enter another serial number. If it is a total return, then go back to the previous page and reduce the return quantity by one and return to the serial numbers page. When you return to the serial numbers page, any valid serial numbers previously entered still show on the screen.

7. Tap Next.

The Parts Return - Create Order screen appears. You use this page to enter shipping details and create an order. In this example flow, this page is used to execute the shipment in consolidated mode where multiple parts and quantity are included in the shipment.

8. Revise the information on this screen as needed:

- Destination Organization  
Select a new organization if it is different from the one previously selected. Tap the Refresh button to update the ship-to address.
  - Destination Sub-Inventory  
Select a new sub-organization if it is different from the one previously selected.
  - Carrier  
Select a carrier.
  - Shipping Method  
Select a shipping method.
  - Waybill  
Enter a waybill.
  - Shipment number  
Enter a shipment number or leave the field blank and the application will assign one.
9. Tap Create Order.
- The application creates the order and displays the order type and number on the screen.

### **To Return Parts without a Consolidated Shipment:**

1. From the Main Menu, tap Parts Returns.  
Main Menu or Springboard > Parts Return  
The Parts Return screen appears. This screen displays all the sub-inventories assigned to you and all the parts contained in each of these sub-inventories. The title area of the screen includes the date that the return list was created.  
You use this page to initiate excess or defective returns by selecting a source sub-inventory. You can also select the consolidation option, which provides for multiple parts and quantities to be included in a single shipment. When the consolidation option is not selected, each piece will be a single shipment. This example flow does not use the consolidation option.
2. Select a sub-inventory from the Source LOV.
3. Clear the Consolidation check box.  
Selecting this option means that each piece is a single shipment.

The Part Details screen appears when there is only one destination, or the screen with a Destination Summary appears if there is more than one destination.

4. In the Return Quantity field, enter the actual quantity of an item to be returned if it is different from the recommended quantity.

5. Tap Next.

The Parts Return - Create Order screen appears. You use this page to enter shipping details and create an order. In this example flow, this page is used to execute the shipment in non-consolidated mode, where each shipment is a single piece.

When the screen first appears, the value for Item is prepopulated with the first item on the list from the Part Details screen, but you can change this item if you want to do so. If the item is serial controlled, then the Serial No field is active.

6. If the item is serial controlled, then enter or scan the serial number of the item being shipped.

**Additional Information:** If you enter a serial number that is not in the inventory balance, then the following message appears at the bottom of the screen: "Serial number not in inventory." When you encounter this message, the invalid serial number cannot be shipped until the discrepancy has been resolved. You can enter or scan another serial number if one is available.

7. Revise the remaining information on this screen as needed:

- Destination Organization

Select a new organization if it is different from the one previously selected. Tap the Refresh button to update the ship-to address.

- Destination Sub-Inventory

Select a new sub-inventory if it is different from the one previously selected.

- Carrier

Select a carrier.

- Shipping Method

Select a shipping method.

- Waybill

Enter a waybill.

- Shipment number

Enter a shipment number or leave the field blank and the application will assign one.

8. Tap Create Order.

The application creates the order and displays the order type and number on the screen.

9. Repeat the steps for this process until you have shipped all items and return quantities.

## Transferring Parts

Using the Parts Transfer page, the technician can transfer parts between two subinventories.

### To Transfer Parts:

1. Navigate to the Trunk Stock page. The Trunk Stock page appears.
2. Search for the trunk stock using the subinventory or subinventory and item as the search attributes.
3. Click the item link in the results region. The Item Details page appears.
4. Click the Transfer action link. The Parts Transfer page is displayed if there is any quantity available to transfer. This page displays item information, the source, and the destination for the item or part.
5. Choose a resource or the destination organization to transfer the parts to.

If you select a resource, the Destination Organization and Subinventory LOVs will display inventories and subinventories for which the selected resource is the owner.

You can select any inventory organization if you do not select a resource. The inventories displayed in the Destination Organization LOV are determined by the profile "CSF: Enable Destination Inventory Organization for Part Transfers." If the profile is set to Yes, then the Destination Organization LOV displays all valid organizations. If the profile is set to No, then the Destination Organization LOV is not displayed. In the latter case, the destination organization is the same as the source organization.

6. Click Done to initiate the transfer process.

## Viewing Project Details

The Task list screen is one of the main entry points into the application. This screen

displays the tasks that are assigned to the technician.

Every task in the Task List screen displays the following information to help a technician get a quick glance of the task without going into the task details.

- Task Number
- Customer Name
- Customer Address
- Task Scheduled Date
- Task Subject
- Planned Effort

Tap any task to open the Task Details screen.

From the Task list screen, tap on a task to open the Task Details screen. This screen displays a technician's task assignment details. You can accept or reject an assignment by updating the task's status. This screen also enables you to capture travel and labor information and report parts used and recovered, create follow up tasks. In addition, this screen also helps you to search order parts, receive parts, and capture notes.

You can also view the project information for a task on the Task Details screen. The project details can also be viewed at the debrief line level. The details that you can view are as follows:

- Expenditure Org.  
The expenditure organization of the project associated with the debrief line. The expenditure organizations are displayed based on the operating unit selected on the service request.
- Project Number  
Number of the project. All project numbers belonging to the selected operating unit are displayed.
- Project Name  
Name of the project
- Project Task Number  
Number of the project task.
- Project Task Name  
Name of the project task.

The project related fields are hidden out of the box and can be displayed on



personalization.

## Accessing the Knowledge Base

### About 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, after 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 available only 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 supports only text-based messages. Any Knowledge Management solution that contains dynamic links or HTML pages will not appear in the search results.

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

Prerequisite: 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 appears 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.

## Getting Driving Directions

You can get driving directions to assist you in getting to customer sites or suppliers.

**To get driving directions:**

### **Steps:**

1. Tap the map icon located in the Customer Address region in the Task Details screen.

The Driving Direction screen appears and contains a list of addresses from all the tasks that are scheduled for the system date.

2. Enter the starting address:

- Tap a link in the list to select it.
- Tap Work Address for help to select the work address.

- Tap Other to type in the starting address.
3. Enter the destination address by following a parallel procedure to that in step 2.
  4. Tap OK.

The Driving Direction screen displays written directions and an associated map.

## 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 or Springboard > Today's Task
2. When the screen appears, 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 re-save your schedule using the same file name you used in Step 2.

## Managing Receipt of Shipments

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.

After 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 or Springboard > Receive Shipments  
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 appears. 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.

## Changing Passwords

### Password Change Information Shared Between MFS Wireless and MFS PPC

Using the Change Password screen, you can change your password to access the Oracle Mobile Field Service - Wireless application.

**To Change a Password:**

1. Navigate Main Menu > Change Password.
2. Enter the current password.
3. Enter the new password.
4. Enter the new password in the Verify Password field.
5. Tap Done to change the password.  
The password has been changed. You can use the new password the next time you access the Oracle Mobile Field Service - Wireless application.

### **Setting Up Search Preferences:**

1. From the main menu, click Preferences.

The Preferences page appears. The Oracle Mobile Field Service - Wireless application gives technicians the capability to set the search preferences for parts search.

2. Enter the search parameters and create saved parameters. You select the following search preferences:
  - Distance
  - My Inventory
  - Other Technicians
  - Manned Warehouses
  - Unmanned Warehouses
  - Include Alternate Parts
  - Include Closed
  - Use On-Hand
3. Click Done to save preferences.

### **Viewing Transaction History:**

1. From the main menu, click Transaction History.

The Transaction History page appears. This page enables you to enter search parameters such as; Subinventory, Transaction Type, Destination Organization, Destination Subinventory Transaction Date, Transaction Date Range, Transaction in Last Number of Days, and Item associated with the technicians sub-inventories.

2. Click the Search button. The Transaction History: Results page displays.

This page displays the transaction results based on your search parameters, with following information:

- From: Subinventory
- Transaction Type
- Destination

- Time
- Item
- Quantity

## Selecting Preferences

You can define several preferences in the application as follows:

- Modify formats, such as the date format, and views, such as the number of results to be shown
- Modify your default primary address and inactivate one of your active addresses
- Choose and change usable and defective default subinventories

### To select general preference:

1. Navigate to the Preferences screen.

Main Menu or Springboard > Settings

The Preferences screen displays item fields wherein you can indicate your preference by selecting a value from the LOV.

2. Select your preference type from the Action field LOV at the bottom of the screen.

Your options are:

- Address & Subinventories
- Part Search Preferences

3. In the User Profile Defaults, select a preferred value for the items that appear.

The item fields are:

- Date Format – The default date format followed in the Mobile Field Service - Wireless is DD-MON-YYYY (for example, 31-DEC-1999).
- Timezone – To set the time zone for the device.
  - Set the profile "Enable Time Zone Conversions" at the server level.
  - Set the application time zone in the Preference screen.
- Home Page – Lists the Main Menu, Open Tasks, Today's Open Tasks, and Today's Tasks.

- Task Display – You can choose any five values from the following list in the Task Display field and those selected five (or less) components will be displayed in the task record.
    - Customer Address – Displays the customer address
    - Duration
    - Priority – Displays the task priority
    - Resource Name
    - SR Number
    - Scheduled Start Time
    - Site Name
    - Status – Displays the task status
    - Task Number – Displays the task number
    - Task Subject – Displays the task subject
    - Task Type
  - Distance Unit – You have the option to select either Miles or Kilometers.
  - Use Icons – Select Yes to display icons instead of buttons.
  - Max Results Per Page – Indicates the maximum number of records to be displayed at a time. This is used for pagination in task search and counter history results.
  - Attachment Limit – Specifies the maximum attachment size limit. Default is 1024 kB.
4. Tap the Save icon to save your preferences.

✓ Your preferences saved successfully.

Date Format 31-DEC-1999 ▼

Timezone (GMT -07:00) Pacific T ▼

Home Page Open Tasks ▼

Task Display Customer Address ▼

- |                         |   |
|-------------------------|---|
| 1. Scheduled Start Time | ✗ |
| 2. Customer Address     | ✗ |
| 3. Status               | ✗ |
| 4. Task Number          | ✗ |
| 5. SR Number            | ✗ |

Distance Unit Miles ▼

Use Icons Yes ▼

Max Results Per Page 7

Attachment Limit 1024 (in KB)





## Viewing Technician Calendar

Oracle Mobile Field Service integrates with the calendar application on wireless devices (smartphones/tablets/pda) to retrieve task related information for field service personnel. This integration ensures that all task information is stored locally in read only format and is accessible even when there is no coverage in the area. This will allow the technician to always know where the next task is, when it is scheduled and what the work is about. It also helps them to identify any empty slot during the working hours for a day and put missing information into the system as well as create time entries.

Technicians can use the calendar to do the following:

- display future Field Service Tasks on device calendar application based on scheduled start and end dates
- display past Field Service Tasks on device calendar application based on actual start and end dates
- display future and past personal tasks on device calendar application based on schedule start and end dates
- navigate to the Mobile Field Service Wireless application's Task detail UI from the calendar details screen when there is network connectivity
- set reminder alerts on the calendar events using Field Service Alerts and Notification feature. Notification is enabled for new task assignment, schedule start/end time updates, as well as cancellation of assignment.

**Additional Information:** The 'Field Service Alerts and Notification' feature must be enabled in order to get notifications from the device calendar application

- on IOS devices only:
  - if the task's service request has customer contact information, an event attachment of VCF format is linked to the event which the users can download on their device
  - users are notified when it is time to start travel based on the event start time, distance between event location and user's current location and time needed to reach the location. For example, if user is at location A and the event is scheduled at 9am at location B, and the travel time to reach location B from A is 30 minutes, then the device will show a notification at 8.30 am. In android devices, reminder time is added for the event based on the Google Calendar settings.

**Note:** This feature is not available in the Mobile Field Service Store & Forward application (i.e., offline applications)

**To use the Calendar tool to view tasks and events:**

1. Login to the Mobile Field Service wireless application on your handheld device.
2. Register the iCalendar url on your wireless device.
  - In IOS devices, navigate to the Preferences UI of the MFS wireless application and click on the iCalendar link to register the phone/tablet.
  - For android devices, user must copy the link and register it on the Google Calendar manually.
3. Sync the calendar application to fetch all the task details.

---

# Using Oracle Mobile Field Service Wireless (Online) – Field Service Administrator Dashboard

This chapter covers the following topics:

- Overview

## Overview

The Field Service Dashboard is the entry point for field service administrators and managers to update and post debrief lines, create and order parts, and return excess or defective parts on behalf of field service technicians.

Using selection filters including Group, Territory, or Resource, an administrator can search for tasks assigned to all the resources for the selected group, territory, or search for a particular resource in a group or a territory. If a resource is selected, then the administrator can search for parts, return parts, and receive parts for the selected resource. Otherwise, the links to parts search, return and receive parts will be used to perform transactions for the logged in user's subinventories.

Using the Field Service Administrator Dashboard, you can do the following:

- View today's tasks, page 6-9
- Search for tasks, page 6-13
- Schedule tasks offline, page 6-38
- Create a service request, page 6-33
- Access the knowledge base, page 6-69
- Search and receive parts, page 6-61

- Return parts, page 6-62
- View the transaction history
- View a technician's trunk stock
- Create a personal task, page 6-46
- Set Preferences, page 6-74
- Change password, page 6-72
- Send mobile queries, page 6-51
- Get driving directions, page 6-70
- Select resources

# Part 4

---

## Oracle Mobile Field Service Notifications



---

# Using Mobile Field Service Notifications

This chapter covers the following topics:

- Using Notifications

## Using Notifications

All of the Oracle Mobile Field Service applications (Oracle Mobile Field Service Store and Forward - Pocket PC and Laptop, and Oracle Mobile Field Service Wireless) 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



---

## 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.

- 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.



---

# Index

## A

---

Alta, 6-4  
Android, 2-1

## C

---

calendar  
    viewing, 6-77  
capture signature, 6-30  
Computer Telephone Integration (CTI), 1-13  
CRM Foundation  
    overview, 1-12  
CTI, 1-13  
Customer Care  
    overview, 1-12

## D

---

Debrief lines  
    labor, 6-19  
Decentralized scheduling, 6-49  
driving directions  
    on wireless device, 6-70

## E

---

expense, 6-19

## F

---

Field service report, 6-30

## I

---

install, 6-19

iOs, 2-1

## K

---

key benefits  
    Oracle Mobile Field Service - Wireless , 1-11  
key features  
    Mobile Field Service - Wireless, 1-9  
knowledge base, 1-14

## L

---

Look and feel, 6-4

## M

---

Mobile Application Foundation  
    overview, 1-12  
Mobile Field Service  
    Oracle Field Service process flow, 1-13  
mobile field service - wireless  
    parts requirement  
        create, 6-56  
Mobile Field Service - Wireless  
    key benefits, 1-11  
Mobile Field Service - Wireless  
    key features, 1-9  
mobile queries  
    by e-mail, 5-1  
    by wireless device, 6-51  
Multiplatform, 2-1

## O

---

Oracle Advanced Scheduler

- overview, 1-12
- Oracle Field Service
  - overview, 1-12
  - process flow, 1-13
- Oracle Field Service Suite
  - overview, 1-11
- Oracle Mobile Field Service
  - applications compared, 1-3
  - overview, 1-1
- Oracle Mobile Field Service Store and Forward - Multiplatform
  - overview, 1-1, 1-13
- Oracle Mobile Field Service - Wireless
  - overview, 1-2, 1-13
  - technology supported, 1-2
- Oracle Spares Management
  - overview, 1-12

## **P**

---

- preferences
  - selecting, 6-74
- process flow
  - Oracle Field Service, 1-13
- project details
  - view, 6-67

## **R**

---

- return, 6-19

## **U**

---

- unassigned tasks, 6-49