Oracle® Field Service

User Guide

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- Did you understand the context of the procedures?
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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. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

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

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

See Related Information Sources on page xii 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 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

Related Information Sources

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

Integration Repository

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

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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 data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to This Product

Oracle Advanced Scheduler User Guide

Oracle Advanced Scheduler enables you to create optimized schedules for assigning tasks to qualified field service technicians. It enables you to define constraints and parameters such as overtime allowed, proximity to the customer site, resource skill, spare part availability, and customer preference of resource and use these to calculate operational costs and provide the most efficient service.

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 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 Mobile Field Service User Guide

Oracle Mobile Field Service offers both connected browser-based solution and a disconnected solution that enables field service technicians to service their customers in a fully automated way. With the service request, field service technicians automatically receive the customer service history and customer install base information. For replacement parts, they can access the robust spare parts management feature of Oracle Mobile Field Service. After completing their tasks, they report labor, materials, and expenses and this information is sent back to the service organization at electronic speed so that an invoice can be given to the customer in a timely manner.

Oracle Spares Management User Guide

This guide describes the tools and features provided by Oracle Spares Management that field service technicians can use to maintain personal and warehouse inventories, locate parts not available in the normal supply chain, create requirements and orders for parts, track order status, and successfully execute internal and external repair. You can learn how to create planning loops that coordinate planning and execution activities across multiple locations, and control the total inventory across all subinventories in the loop.

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.

Oracle E-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

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

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

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

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.

1

Understanding Field Service

This chapter covers the following topics:

- Introduction to the Field Service Suite
- Field Service Integration with the E-Business Suite
- Field Service Business Models
- Preventive Maintenance Programs
- Task Status and Task Assignment Status Flow

Introduction to the Field Service Suite

The Oracle Field Service suite supports automated processes for managing field service operations. In cases where the Original Equipment Manufacturers (OEM) use third party service providers for better, wider, and faster field service coverage, Oracle Field Service provides portals that administrators and technicians of third party organizations can use.

Field Service provides specialized functionality for scheduling and dispatching tasks to field technicians, and monitoring the progress and status of those tasks through to completion. The application has a full range of debrief capabilities to support call closure and reporting time, parts, and expenses associated with the execution of the task. The application also includes street level routing capabilities through Oracle Advanced Scheduler when used in conjunction with spatial data. Oracle Spares Management provides logistics and inventory planning features. A Preventative Maintenance module is included for planned work.

Advanced Scheduler Option

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Debrief

The Debrief component of the Oracle Field Service product provides the ability for reporting day-to-day service activities performed at customer sites. These activities include data related to a specific field task, such as task status, labor, and expenses and data related to the parts assigned for the task such as the condition of the parts assigned, counter readings, and recovery or return routing.

You can return unused, defective, and recovered parts during debrief from Oracle Field Service or Mobile applications. You can view and update debrief information prior to uploading to Oracle Inventory and Oracle Install Base. When the task status is set to Completed, the Update Debrief Lines concurrent program posts debrief information to Install Base and Oracle Inventory and creates charges. Alternatively, you can choose to manually post debriefs at any time from the Debrief tab of the Administrator and Technician portals.

Dispatch Center

The Dispatch Center is a one-stop service task resource scheduling and monitoring dashboard in the Oracle Field Service product. Dispatchers use the Dispatch Center to schedule, release, and monitor field service activities. Dispatchers can view incoming service requests, schedule and release work to technicians, and create daily work routes, or trips, for each service technician. They can also monitor progress of filed service tasks, and adjust or reschedule tasks if necessary.

The Dispatch Center Plan Board and Gantt views support monitoring service technicians progress against their schedules. Dispatchers can change schedules to react to unplanned events. If spatial data is loaded, dispatchers can use the Dispatch Center Map to view the technicians status and location.

On behalf of technicians, dispatchers can enter debrief details for a task with respect to time spent, material consumed, and expenses incurred.

Mobile and Wireless Options

After tasks are committed to field technicians, the schedules are then communicated to Field Service technicians through the following Oracle Mobile Field Service optional

products:

- Mobile Field Service (Store and Forward) - Laptop

- Mobile Field Service (Store and Forward) - Pocket PC Devices

- Mobile Field Service - Wireless and Voice

Oracle Mobile Field Service (Store and Forward) runs on laptop or pocket personal computer devices. Service requests and associated task related information are stored locally on the disconnected device.

The Oracle Mobile Field Service (Wireless and Voice) module provides real-time wireless access to the enterprise applications. Using a wireless device, technicians can remotely access the latest information critical to performing their work. They can also perform debrief and use return routing to enable more efficient utilization of unused, excess, and defective-on-arrival parts that were assigned to the task but not installed. Additionally, they can use the wireless device to create service requests and tasks, and self schedule them.

The Mobile Field Service module includes a voice-activated application providing access to enterprise information through a land line or cell telephones. Input modes include keypad and voice recognition.

Portals

Field Service provides web-enabled personalized portals for its administrators, technicians, and for third party administrators and third party technicians. The Field Service Administrator Portal is customized for third party administrators, as is the Field Service Technician Portal for third party technicians.

Field Service Administrator Portal: provides managers and administrators with the ability to view, update and report on individual task assignments on behalf of technicians, review and correct debrief and billing, and monitor and close service requests. They can search for tasks by resource group or territory. They can also create service requests, use Advanced Scheduler to schedule tasks, monitor these tasks, and create personal and follow-up tasks. In addition, they can order parts, receive shipments, monitor technician trunk stocks, and manage the quick return and recycle of recovered, excess, and defective-on-arrival parts.

Field Service Third Party Administrator Portal: provides third party administrators with the ability to view, update and manage tasks after field service dispatchers have created service requests and field service tasks against customers and assigned them to third party service providers. While Field Service managers or dispatchers still manage the service lifecycle when scheduling tasks to third party organizations, they need not worry about customer confirmation requirements, task constraints such as task duration vis-a-vis shift timings, customer access hours and after hours, parts availability, cost factors, trip availability, and travel time. They can commit the tasks to available third party resources and leave the relevant third party administrators to do

the rest of the tasks while manually scheduling and rescheduling tasks among the third party technicians assigned to them till task completion. They can also order parts, return excess parts, receive shipments, and create follow-up tasks.

> **Note:** Third party administrators can create new service requests and tasks for existing service requests if this feature has not been turned off using OA personalization. They can only manually manage the schedules of technicians belonging to their third party organization.

Field Service Technician Portal: enables field technicians to access, update, and report on their individual task assignments. Technicians can view their calendar, order spare parts, return excess parts, receive shipments, add notes, create follow-up tasks, and initiate new service requests. The Technician Portal integrates with other Oracle applications such as TeleService, Install Base, Knowledge Management, Service Contracts, Spares Management, as well as key components of CRM Foundation, such as Notes, Calendar, and Task Manager.

Field Service Third Party Technician Portal: enables third party technicians to access, update, and report on their individual task assignments. They can view their calendar, order spare parts, return excess parts, receive shipments, and add notes.

> **Note:** If OA personalization has not been used to turn off features, third party technicians can view service request details, create new service requests, and update the Install Base.

Preventive Maintenance (PM)

The Preventive Maintenance solution in Field Service supports planned maintenance and inspection programs. PM programs can be defined and linked to the install base through Contracts. PM schedules, based on either usage activity or time, can be automatically created along with the service request and task required for execution.

Spares Management Option

Oracle Spares Management includes both logistics and inventory planning functionality needed to manage a service parts inventory across the Field Service supply chain. Integration with Oracle Advanced Scheduler provides you with the capability to coordinate parts availability with technician schedules. Spares logistics processes include:

- Processing of orders.

- Managing excess inventory.

- Tracking and managing of parts repair activity for internal and external repair suppliers.

Complete integration with Oracle Depot Repair is included for internal repair suppliers.

Spares inventory planning covers technician and warehouse inventories. Automated min-max planning for technician sub-inventories includes specialized features to handle planning scenarios unique to Field Service, such as planning for the new or transferred technician. Automated time-phased planning for the warehouse includes integration with internal and external repair.

Field Service Integration with the E-Business Suite

Oracle Field Service integrates with these Oracle Applications.

> **Note:** If Oracle Endeca is installed and licensed in your environment, then refer to the *Oracle E-Business Suite Endeca Integration and System Administration Guide* for detailed information about the Endeca enhancements to your product.

CRM Foundation

Field Service relies on information set up in the following CRM Foundation components:

Resource Manager

You define service technicians and dispatchers individually in the Resource Manager. To be able to access the Oracle Field Service Dispatch Center, you also need to define dispatchers as part of a dispatcher group created in the Resource Manager.

For information on setting up Field Service technicians and dispatchers, see Setting Up Field Service Technicians and Dispatchers, *Oracle Field Service Implementation Guide*.

Territory Manager

Territory Manager is used for two purposes:

- Populating technicians in the Dispatch Center Plan Board and Gantt views.

- Identifying qualified technicians for task scheduling.

Task and Escalation Manager

You use the Task and Escalation Manager for setting up task types, statuses, templates, priority, escalation, and so on.

Knowledge Base

Knowledge Base is a repository of information useful for resolution of repetitively reported service issues.

Calendar

For each technician you need to define working hours, shifts, and non-available working hours such as public holidays or vacations. This information is used for scheduling.

Notes

Notes provide a text area for entering information about a customer, product, service, or anything related to the service report that may be helpful for other service technicians or customers. After creating a note, it can be attached to the task, sent to the customer, and submitted to the knowledge base for reuse. Notes functionality is accessible from Debrief.

Trading Community Architecture

Trading Community Architecture (TCA) provides information about parties and contacts. Field Service relies on information set up in the following Trading Community Architecture components:

Inventory

Inventory provides information used by the service request to determine the items that are serviceable. Inventory is also used to track inventory balances and is tightly integrated with debrief to process inventory transactions reported by the technician in task closure. Spares Management uses on-hand and available inventory balances for inventory planning and Advanced Scheduler integration.

Install Base

Install Base provides information used by the service request to indicate the items that are installed base items. It provides input to the Dispatch Center and Advanced Scheduler as to which service technicians are preferred to perform the field visit. Finally, Install Base provides information that is sent to the Mobile applications, and then used by service technicians when servicing the asset or customer-owned product.

You can update a customers Install Base from Debrief. Updating the Install Base results in an update of the items of the customers Install Base. After you report information in Debrief that information cannot be modified after it is transmitted to the Install Base.

TeleService

A *service request* is created when a customer calls for assistance. *Tasks* are created when it is determined that a service technician must visit the customer site.

Service Requests

Service requests are initiated by entering information through Self Service iSupport, the Contact Center window, or the Teleservice Service Request window that are delivered with the base Field Service product.

Charges

You can update Charges with parts usage, counter information, labor time, and expenses for a task from Debrief. Recorded information transmits to the Charges database when you update a transaction. In Charges, this information is checked against contracts. Charges are then sent to Order Management, and an invoice is generated.

After you report information in Debrief that information cannot be modified after it has been transmitted to Charges.

Service Contracts

Contracts and Service Contracts

The contracted response time for a service request is used for task scheduling. The Contracts Labor Billing Schedule is also used to automatically generate labor charges from labor debrief records.

Workflow

You can use Oracle Workflow to send task related notifications to technicians. The Field Service Task Assignment Alerts workflow is used to send notifications to the Field Service technicians for new task assignment, task assignment deletion or cancellation, and task rescheduling. However, you can customize the workflow to send notifications that suit your business requirements.

Field Service Business Models

The Oracle Field Service solution supports two business processes: break/fix and planned work. The break/fix process applies to repair operations for unplanned equipment outages, or annoyances and cosmetic issues that are saved up over time. The planned work process applies to preventive maintenance and field inspections. Many field service operations employ both processes.

Preventive maintenance requires some additional ongoing setup activities, such as defining time-based and usage-based PM programs, and forecasting usage rates. These periodic processes are discussed later. See Preventive Maintenance Programs, page 1-11.

This section includes the following topics:

- Field Service Business Processes, page 1-8

- Preventive Maintenance Programs, page 1-11

Field Service Business Processes

Field service business processes are initiated by field service requests, generated by a preventive maintenance program, or as the result of communication with a customer.

When service visits are necessary, field service tasks are created and scheduled to qualified and available service technicians. Required service parts are reserved or ordered. Technicians report completion of tasks along with time, parts and expenses used. Charges are recorded, and invoices are created. This process is driven by service request and task status changes.

Field service business processes are described in more detail below:

Initiating field service requests and verifying entitlement

1. Customers initiate field service requests through the Web, e-mail, or by dialing into a call center. As requests are received, the customer, product, and service contract are checked in the entitlement step. At this point, the Service Level Agreement (SLA) Respond By and Resolve By dates and times are stamped on the service request.

2. For preventive maintenance programs, the solution generates service requests and tasks automatically.

3. This process relates to the following applications:

   - Oracle TeleService Service Request window: Service requests are initiated by call center agents or dispatchers from the Contact Center or Service Request windows.

   - Oracle Service Contracts: Customer entitlements and SLAs are applied.

   - Oracle *i*Support: Service requests initiated by customers or agents through the Web.

   - Oracle E-mail Center: A service request arrives through the e-mail inbox.

   - Oracle Mobile Field Service: Service requests and tasks created by Field Service technicians.

   - Oracle Field Service Preventive Maintenance: System generates service requests.

Screening Field Service requests

1. After a service request is created, it is screened to determine whether a field visit can be avoided. Analysts search the Knowledge Base for solutions to previously reported similar service issues. Possible outcomes from this process include: closing the request, shipping a replacement part to the customer, or authorizing the

customer to return the defective product for exchange or depot repair. When field visits are required, predefined tasks can be used based on problem descriptions and actions needed to resolve the issues. Service parts and skills can also be defined for a task.

2. This process relates to the following user interfaces:

- Service Request: Access the Knowledge Base.

- Knowledge Base: Search for previously reported similar issues for a solution.

Scheduling tasks to service technicians

1. Task scheduling is the core functionality of the Field Service application. Task assignment in Oracle Field Service is assisted by the Advanced Scheduler. Advanced Scheduler functionality is used for enhanced task scheduling, either in interactive or automatic mode. Advanced scheduling is based on decision factors such as required skills, service territory, customer site access hours, preferred technician, and spare parts inventory.

2. This process relates to the following applications:

- Oracle Field Service: Use the Dispatch Center to schedule, monitor, and dispatch tasks.

- Oracle Advanced Scheduler: Provides comprehensive scheduling capabilities and enables the optimization and recalculation of scheduling tasks to qualified resources.

- Oracle Spares Management: Use the Spares Management application to order spare parts. When Advanced Scheduler is installed, and there is a parts requirement, the parts are automatically reserved or ordered at task assignment.

Scheduling service technician trips

1. Service trips are planned, based on factors such as travel time and distance, service level agreement priority, and overtime costs. When this step is done, task schedules are released to the service technicians. Optionally, the service technician may accept or reject task assignments, or unplanned events could require that committed schedules be changed.

2. This process relates to the following applications:

- Oracle Mobile Field Service (Laptop and Handheld Devices): After synchronization, the schedule is received on the mobile devices.

- Oracle Mobile Field Service (Wireless): Similar to Laptop and Handheld

Devices, however real time schedule information is available from the wireless connected mobile device.

Executing services

1. Service technicians deliver services at the customers sites according to the assigned task schedule. Technicians indicate progress by advancing the task status.

2. This process relates to the following user interfaces:

   • Knowledge Base: Search for related information.

   • Field Service Technician Portal: Drill to task details and notes.

Monitoring service visits

1. Dispatchers use the Dispatch Center to monitor execution of scheduled task activities and make adjustments or reschedule tasks if necessary. For example, a dispatcher responds when conditions of a Service Level Agreement are not being met for a particular service request.

2. This process relates to the following applications:

   • Oracle Field Service Dispatch Center: Plan Board, Gantt chart, and Map.

   • Oracle Service Contracts: Service Level Agreements (SLA).

Debriefing service visits

1. Technicians report time, expense, and service parts they install or recover from the site. They can also report additional information which includes counter readings and notes describing how the problem was resolved. Technicians can create follow-up tasks or new service requests if, for example, the problem was not resolved during this visit, or additional service issues are discovered.

2. This process relates to the following applications:

   • Oracle Mobile Field Service (Laptop, Handheld Devices, and Wireless): Technicians report time, material, expenses, and counter readings.

   • Oracle Field Service Debrief: Information from mobile devices is received and consolidated in Debrief. This information is then used to update Inventory, Install Base, and Charges.

Completing and closing tasks

1. As service technicians complete tasks, they advance the task status to Completed on the Update Task Status page that they access from the Technician Portal.

2. This process relates to the following page:

   - Field Service Technician Portal: Update Task Status.

3. Advancing the task status to Completed or Closed initiates updates to Inventory and Install Base and automatically generates charges.

4. Alternatively, technicians can report on parts, perform return routing during debrief and directly post debrief to update Inventory and Install Base and create charges irrespective of task status.

Billing for field service visits

1. The Field Service manager or administrator can validate service contract and warranty coverage information. They can review and change debriefing and charges information, initiate an invoice process, and update Inventory and Install Base information.

2. This process relates to the following applications:

   - Oracle Field Service Administrator Portal: Review and change debriefing and charges information.

   - Oracle Charges: Invoices are automatically generated and reviewed for billable expenses.

Managing service parts inventory

1. The Spares Management component plans service part inventory for Field Service warehouses and technicians, creates priority and replenishment orders, manages excess parts, and facilitates recovery, consolidation, and repair of defective parts.

2. This process relates to the following applications:

   - Oracle Spares Management: Logistics and inventory planning.

Preventive Maintenance Programs

Define Preventive Maintenance (PM) Programs

You can define PM programs for products that need planned inspection and maintenance. PM programs track customer products, installations, and usage. PM programs are defined either as usage-based or time-based. For usage-based PM programs, a usage forecast is required.

1. **Defining PM Programs**

Maintenance Engineering defines PM requirements and programs. This setup is implemented in Oracle Field Service Preventive Maintenance, and in Oracle Service Contracts.

2. **Authoring Contracts**

Service Marketing creates PM contract offerings, which define contract price and the financial coverage of work done, PM service requests, labor coverage, parts coverage, and so on.

Sell Maintenance Contracts

PM contracts are sold to customers and define which products in the Install Base are covered. Instances of products, coverage, and program schedules are maintained by the service contracts department to track and plan for PM activities.

Service contracts can be authored for serviceable products and incorporate fixed, or date based, preventive maintenance schedules. Service coverage templates can be created to include PM program and activities with patterns of maintenance schedules.

The PM program and activity schedules are automatically instantiated from the predefined coverage templates.

Generate PM Service Requests and Tasks

- **PM Planning**

  PM planning occurs in two phases:

  First, a general PM schedule is generated for the length of the program. PM schedules can be based on forecasted or actual usage, or can be based on appointed service due dates. For usage-based PM programs, the schedule is based on actual counter readings and forecasted usage. For time-based PM programs, the schedule is defined in the contract itself.

  Second, service requests and tasks are generated over a time frame that can be defined by the user. A concurrent program is used to automatically generate PM service requests and tasks.

- **PM Execution**

  Once PM programs are established, standard Field Service execution is used for scheduling, reserving or allocating resources, capturing customer confirmation, delivering PM activities, and billing the customer.

  > **Note:** The following additional processes are unique to PM task completion:

1. When PM tasks are completed, Debrief updates the PM schedule with task accomplish dates.

2. If the PM program is usage-based, Debrief updates counter readings. When the PM schedule is updated, the forecast usage rate adjusts for the actual usage recorded in Debrief.

For detailed information on setting up preventive maintenance, see the *Oracle Field Service Implementation Guide*.

Task Status and Task Assignment Status Flow

Task Status

Changes to task status drive the Field Service processes. Depending on the current status, different subsequent actions, transitions, and statuses are possible. Once a task is released to the scheduled resource, the task assignment status determines the task status.

Task Assignment Status

When the task is assigned to a resource, a task assignment is created. A task assignment consists of a resource and a related task. Oracle Advanced Scheduler assigns only a single technician to a task. Dispatchers can manually add more technicians in the Tasks tab of the service request.

After task assignment, you commit the schedule. The commit process releases the work to the technicians. When the schedule is committed, *task assignment status* and *task status* change to *Assigned* or as dictated through the profile option CSF: Default Commit Task Status. Task assignments are then available to the Field Service technicians, and sent to their mobile devices. Service technicians report on task assignment status.

Task assignment status displays in the Resources tab and it also displays on the Plan Board and Gantt chart of the Dispatch Center. *Task status* displays in the Task Status field of the Overview tab of the Dispatch Center.

Task statuses and task assignment statuses that display in the Dispatch Center enable the dispatcher to monitor progress. When a task is created, it typically enters the Dispatch Center at a status of *In planning*.

> **Note:** The dispatcher can manually update the status and assignment status of a task from the Dispatch Center. For more information on such updates and edits, see the Overview Tab and Overview: Rescheduling Tasks in this guide.

Oracle Field Service comes with a predefined task status flow. This table lists the seeded task statuses used in the predefined task status flow, their behavior, and the event that

occurs when they are created. When all task assignments for a task are completed, the task status changes to *Completed*.

Seeded Tasks Statuses and Task Assignment Statuses

Task Status	Task Assignment Status	Behavior	Event
In Planning	In Planning	The task is ready for scheduling. The dispatcher can schedule the task to technicians.	Task creation.
Planned	Planned	The task is scheduled. It has scheduled dates and times and is assigned to one or more technicians.	Task is scheduled and assigned.
Assigned	Assigned	The task is committed (released) to a service technician.	Task is released to a resource.
Accepted	Accepted	The task is accepted by the service technician. Reporting on the task is enabled.	Technician accepts the task.
Traveling	Traveling	The service technician is en route to the customer site to start work on the assigned and accepted task. While in this status, you cannot reschedule this task to the same technician or other technicians. Reporting on the task is enabled.	Technician travels to work site.
Working	Working	The service technician arrives at the customer site and starts work on the task. Entering actual start time enables dispatchers to view progress on the schedule and to view the predicted start times of next tasks. Reporting on the task is enabled.	Technician arrives at the work site.

Task Status	Task Assignment Status	Behavior	Event
Completed	Completed	Work on the task is done. No further updates or reporting on the task is allowed. Reporting on the task is enabled.	Task is complete. Technician departs from work site.
Closed	Closed	Debrief for the task is reviewed and sent to Charges. Install Base and Knowledge Base are updated. Note that irrespective of task assignment status, debrief may have been manually posted resulting in the update of Install Base and Inventory and the generation of charges.	After review, the service request associated to the task is closed.

> **Important:** You can define additional task statuses and modify the task flow. For the Preventive Maintenance module, you must define a Task Status of 'Confirm.'

For more information, see Setting Up Task Status, Transition Rules, and Cross-Task Validation in the *Oracle Field Service Implementation Guide*.

Close Task Automation

Under certain circumstances, tasks are closed automatically upon closure of the service request for which they are associated. Oracle Field Service makes several validations to ensure that only appropriate tasks are closed automatically. The validation of the automated closure ensures that the tasks comply with the Field Service state transitions applied to tasks during setup.

Conditions that must be met to enable automated closure:

- The Task Type must have the Rule set to 'Dispatch' and have the 'Schedulable' check box selected on the Task Types window (Field Service Setup > CRM Foundation > Task and Escalation Manager > Setup > Define Task Type).

- The task must be at one of these statuses: Rejected, Completed, or Canceled.

- The Task must not have an open debrief line.

  - For tasks that need to be closed but have not been scheduled yet, there is no

debrief line check.

- Scheduled tasks that need to be closed and have only the scheduled start date are unplanned during the close task automation process as long as no debrief lines exist.

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

2

Creating Service Requests and Field Service Tasks

This chapter covers the following topics:

- Overview: Service Request and Task Creation
- Overview: Dispatch Center
- Marking Tasks for Customer Confirmation
- Defining Customer Access and After Hours Constraints
- Creating and Submitting Charges
- Creating Task Dependencies
- Overview: Parts Search and Ordering
- Creating Parts Requirements Automatically for Tasks
- Viewing and Manually Creating Parts Requirements
- Receiving Parts from the Dispatch Center
- Creating Follow-up Tasks from the Dispatch Center

Overview: Service Request and Task Creation

Self-service Web portals built with Oracle *i*Support make it possible for customers and employees to log and monitor their service requests. Oracle TeleService agents can publish service requests for the customers to view, suggest knowledge base solutions, and communicate with customers through notes. To understand how customers interact with the service organization through a self-service Web-portal see the *Oracle iSupport User Guide*.

Refer to the *Oracle TeleService Implementation and User Guide* for more information about the following topics:

- Managing service requests from the Contact Center.

- Creating and updating service requests (from the Contact Center).

- Creating service requests (from the TeleService Service Request window).

- Creating tasks for a service request manually.

- Using Auto Task Generation (to create tasks automatically).

- Creating tasks using a template.

- Searching the Knowledge Base for solutions (to a service request).

- Selecting task owners and assignees.

  > **Note:** You can navigate to the Parts Search page from the Parts Requirement Find page or directly from the Dispatch Center, FSTP, FSAP or Service Request UI.

The Parts Search page is linked to the service request and task to enable the other groups to create Parts Requirements for technicians

Overview: Dispatch Center

The Oracle Field Service Dispatch Center is a one stop dashboard and workbench for dispatchers. It assists with planning, scheduling, committing, monitoring, and adjusting field service activities and schedules.

For complete information on setting up Field Service technicians and dispatchers, see Setting Up Field Service Technicians and Dispatchers., *Oracle Field Service Implementation Guide*

How the Dispatch Center Populates With Information

In this section, we summarize the Field Service technician and dispatcher setup, and then explain how the Dispatch Center populates with the subset of information of interest to the logged in dispatcher.

The setup summary includes:

- The System Administrator sets up each dispatcher and technician with a unique user ID.

  See Creating an Applications User ID., *Oracle Field Service Implementation Guide*

- Dispatchers and technicians are set up as employees in the Oracle Human Resources application.

  See Creating a Human Resources Employee Record., *Oracle Field Service*

- Employee records are imported to Oracle Field Service.

  See Importing the Field Service Employee into the CRM Resource Manager., *Oracle Field Service Implementation Guide*

- In Oracle Field Service, dispatchers are identified with the dispatcher resource type and role.

  See Assigning Dispatcher Role and Role Type to Resource., *Oracle Field Service Implementation Guide*

- Each technician is assigned to a territory.

  See Assigning the Resource to a Territory., *Oracle Field Service Implementation Guide*

- Each dispatcher is assigned to a planner (dispatcher) group. See Adding the Dispatcher Resource Record to a Planner Group, *Field Service Implementation Guide*.

- Each territory is assigned to a planner group. See Assigning Territories to Planner Groups., *Oracle Field Service Implementation Guide*

- Subsets of territories within a planner group are associated to specific dispatchers within the same planner group.

When the Dispatch Center window is invoked by the dispatcher user *for the first time*:

- From the log-in application user ID, the dispatchers employee record is identified.

- Based on the employee record, the dispatchers planner group is identified

- Based on the planner group, all territories assigned to the planner group are known.

- All technicians in all territories assigned to the planner group display.

- The dispatcher selects the appropriate territories to administer tasks. See Associating Territories to a Dispatcher, *Field Service Implementation Guide*.

- Plan Board, Gantt, and Map views populate with resources from the associated territories.

- List of selected territories is stored in a table.

For the *subsequent* log-ins by this user, the Dispatch Center window is invoked using the following process:

- From the log-in application user ID, the dispatchers territories are retrieved from the table where the selected territory IDs were stored previously.

- Field Service Dispatch Center Plan Board, Gantt, and Map views populate with resources from the associated territories.

When the dispatcher selects or deselects any of the selected territories in the Select Territories and Task Owners window, the territory IDs are updated accordingly for this user. This setting is honored for subsequent log-ins by that user.

Task View

The Dispatch Center Task view lists tasks and task attributes for the selected view in a table across the top of the window. Above this table is the list of view by query values, the time zone of the logged in dispatcher, and four icons at the top right for switching between the Tasks, Plan Board, Gantt or Scheduling Chart, and Map views. Below the task list table are several tabs that organize detail information for the task selected in the table.

The tasks list table enables you to look at multiple task attributes in a single view. These attributes focus on the task, associated service level agreement and service request, and scheduling details. You can use the properties of a table to sort tasks by a column such as task priority or assignee or you can use the Sort window available from the Task right-click menu. For more information, see Sorting the Tasks List Table, page 5-9.

Task List Table

You can use the right click menu provided to perform actions on a selected task such as mark a planned task for customer confirmation, create and view charges, create a parts requirement, schedule it, commit it, and enter debrief details. You can also later reschedule or cancel a scheduled task from the Dispatch Center.

You can populate the tasks list table by selecting a query from the list of values at the top of the Dispatch Center window. Some queries are seeded and delivered with the application. For example, you can view tasks that are at the 'Escalated' status.

Alternatively, you can launch the Basic or Advanced Find window, and then define a custom query to find tasks that match combinations of specified criteria. Once defined, the names and descriptions of these custom queries appear in the list of query values. You can see all seeded and custom queries in the Query tab of the Spreadtable Meta Data Administration window. See Populating the Dispatch Center Tasks List Table, page 5-2

Your system administrator can customize the display of task attributes and their order of display in the tasks list table using the Spreadtable Meta Data Administration window. For more information, see the *Oracle Field Service Implementation Guide*.

You can additionally right click and use the Sort menu to quickly sort the table by selected sort criteria and the order of these criteria. For more information, see Sorting the Tasks List Table, page 5-9.

Plan Board, Gantt, and Map Views

You can access other views of the Dispatch Center, by clicking the Plan Board, Gantt, or Map icons at the top of the window.

The Dispatch Center Plan Board and Gantt chart support monitoring progress against service technician schedules in the regular as well as stand by (After Hours) shifts. Dispatchers can change schedules to react to unplanned events. If spatial data is loaded, dispatchers can use the Dispatch Center Map to view a technician's status and location.

Marking Tasks for Customer Confirmation

Call center agents and dispatchers can mark a task to indicate that a customer requires confirmation prior to a technician arriving on site. Field Service provides a process for the dispatcher to record the customer confirmation requirement prior to scheduling the task. However, dispatchers can commit the task to the technician while recording customer confirmation. See Releasing Work to the Field - Interactive Process, page 5-40.

A customer confirmed visit can not be modified without the approval of the customer, although the dispatcher can change the task status from Confirmation Received back to Confirmation Required. However, you can use the regular task right-click menu options from the Dispatch Center's planboard to unschedule, reschedule, or cancel the task after

the receipt of customer confirmation. You can also use this task as the parent or child task in a set of tasks that you want to reschedule or cancel. When you reschedule, unscheduled, cancel a Confirmation Received task, the status of the task changes back to Confirmation Required.

Customer confirmation is a four-step process:

1. Capture the customer confirmation requirement.

2. Schedule the task.

3. Record receipt of the confirmation and commit the task.

4. Reschedule if customer confirmation is received and later rescinded.

Dispatchers can always reschedule if customer confirmation is previously received and later rescinded and optionally remove this constraint

In the break/fix mode, the customer confirmation requirement can be captured in the call center. For preventive maintenance work, the customer confirmation requirement is captured in the contract. The customer confirmation requirement is stamped on the task when the preventive maintenance service request is created.

Once recorded, if the Confirmed status is reversed, the Field Service application records whether the customer or the field service operation initiated the change. Business practice modifications may be indicated if an audit trail reveals that changes by the service provider are too frequent.

Use the following procedures to add a customer confirmation to a task, to record a confirmation, to commit the task, and to undo a previously required customer confirmation.

Steps:

1. Navigate to the Customer Confirmation window, page A-2.

Adding a Confirmation Requirement

2. In the Customer Confirmation region, if customer confirmation has not been set to yes, the field displays 'Not Required'. To set to 'Required', click Set to Required.

   Setting customer confirmation to Required for the task, enables the dynamic display of Customer Confirmation Required button on the Overview tab of the Task Details view of the Dispatch Center.

3. The dispatcher can change the confirmation back to 'Not Required' by clicking Set to No.

   A popup window with the following message: "Are you sure this task does not require customer confirmation?" appears. Click Yes.

Indicating Confirmation

4. After a dispatcher receives a customer confirmation, click Set to Received in the Customer Confirmation window. Alternatively, click Customer Confirmation Received in the Overview tab of the Task Details view of the Dispatch Center.

> **Important:** If confirmation is received for a parent or a child task, all the related parent and child tasks are confirmed.

5. In addition, select the Commit Task check box in the Customer Confirmation window to simultaneously assign the task to the technician.

Reversing Confirmed Status

6. Once a confirmation is received, a dispatcher can reverse this status, by clicking Set to Required.

A popup window asks whether this action is requested by the customer. If yes, then the Customer Confirmation Counter does not record the action. If no, then this change increments the counter.

Defining Customer Access and After Hours Constraints

Some customers restrict access to their site to times when work on a task would not intrude on normal business operations. To facilitate this scenario, Oracle Field Service enables you to define periods during all days in a week when a technician can arrive and start working. When access hours are defined, Oracle Advanced Scheduler automatically considers this constraint when it is identifying options.

Alternatively, you can also indicate that a task needs to be scheduled 'After Hours'. You enter the After Hours constraint as free form text and it is treated as 'Special Instructions for field visit'. When the After Hours mechanism is invoked, the task must be scheduled interactively. The dispatcher can view and schedule an After Hours task by making a query in the task list that identifies those tasks carrying the After Hours attribute.

Use this procedure to create access hours and after hours constraints for a particular task.

Steps:

1. Navigate to the Access Hours window, page A-2.

The Access Hours window appears. The task details for the task that you want to create access hours or after hours requirements for are displayed. Boxes appear for each of the seven days of the week. There are four boxes available for each day of the week, so you can schedule two different Access Hour time slots for each day.

Setting Up Access Hours

2. To create Access Hours, select the Active Access Hours check box.

   This disables the After Hours check box. The two actions are mutually exclusive.

3. Fill in the access hours that are available for scheduling service tasks. For example, Monday 09:00-11:00.

   Hours must be entered in military time.

4. Save your work.

After Hours

5. To create After Hours, select the After Hours check box.

   This disables the Access Hours check box.

6. In the text box to the right of the check box, enter any instructions regarding the after hours scheduling that you want the dispatcher to consider.

7. Save your work.

Restrictions

You cannot define or update access hours for tasks in Canceled or Closed status. In addition, you cannot remove access hours for tasks in Working or Completed status. If you update access hours, you must reschedule the task for these updates to take effect.

Creating and Submitting Charges

Charges is a component of the Oracle TeleService application that is used for:

- Creating orders for shipments

- Creating return orders (RMA)

- Billing customers for any services provided to them

You can use the charges feature to create and view charge lines (shipments, returns, and billing), create and view estimated charge lines and convert them to actual charges, roll up charge lines (labor, material, expenses) into a defined item (labor, material, and expenses), associate charge lines with an existing order, apply contract terms and conditions to charge lines, view coverage information for a contract, and submit charge lines to Oracle Order Management

Prerequisites

❑ The service request must have some tasks to create and submit charges.

1. Navigate to the Dispatch Center.

2. Right-click the task for which you want to create a charge

3. Select Charges and Service Logistics option.

   The Charges page appears.

4. Click Add New Charge in the Actual Charge Lines region to create an actual charge line or Add New Estimate in the Estimated Charge Lines region to create an estimate charge line.

5. Enter the following details:

   • Service request type - Enter the purpose of this charge line, for example, Return, Labor, or Expenses.

   • Item Name - Inventory number of the labor, material, or expenses item. You must make an entry in this field even if you are entering a charge line for an installed base item a customer is returning.

   • Quantity - If you are entering a return the quantity must be negative. If the return is for an installed base item, the quantity must be -1.

   • List Price - The price of the item from the price list entered on the Pricing Rules subtab, or for expenses.

   • Override Unit Price - You can use this field to adjust the unit price.

   • Extended Price - Read-only field that displays the Override Unit Price times the quantity.

   • Contract Discount Amount - Read-only field that displays the discount based on the contract.

   • Net Price - The extended price minus any contract discount. You can adjust this price, which is the price that appears on the customer invoice.

   • Party Addresses - The billing and shipping address for the customer. This information is displayed from the service request.

   • Inventory Organization - An organization for which you track inventory transactions and balances, and/or an organization that manufactures or

distributes products.

- Order Management Interface - Verify that the OM Interface check box is selected if you want this charge line to be passed to Oracle Order Management.

6. Click Apply. The new charge line appears in the Actual Charge Lines region.

7. Click Submit Charges to submit the charges to Order Management.

Creating Task Dependencies

To work more effectively with customers having multiple related tasks, you can create and view task dependencies from the Dispatch Center.
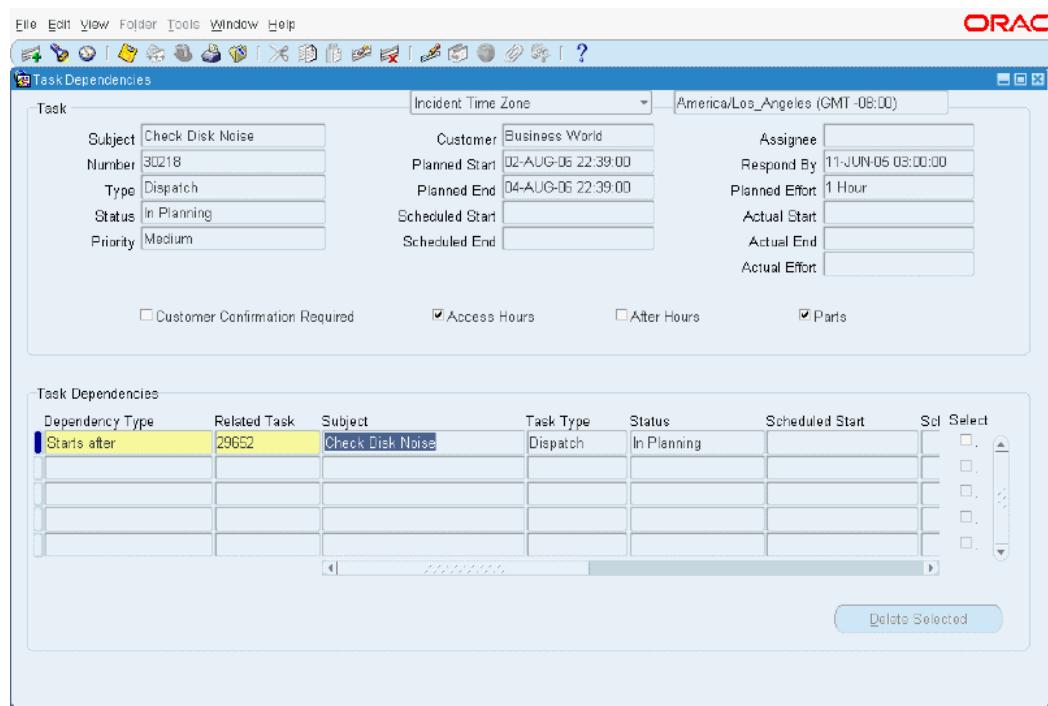
The purpose of the dependency relationship is to store time-based dependencies between tasks. For example, if two network specialists need to test cell telephone communication quality between two remote areas, you can create a 'Starts together with' dependency relationship between these two related tasks.

When you select a task to create a task dependency, the Task Dependencies window displays task details, including number, planned start and end, task type, status, and priority. It also displays check boxes indicating whether customer confirmation is required, whether there are specific access or after hours requirements, and whether parts are required.

If a task that is in a dependency relationship is canceled, the dependency is

automatically deleted.

Currently, dependencies are not considered by Oracle Advanced Scheduler. The dispatcher must manually schedule and monitor the execution of the dependent tasks to ensure the relationship is met.

Prerequisites

❐ The task must have a status of *In Planning*, or *Planned* to create a dependency.

> **Note:** This window is read only for tasks carrying a status other than *In Planning* or *Planned.*

Steps:

1. Navigate to the Task Dependencies window, page A-2.

   The Task Dependencies window appears.

2. After you navigate to the Task Dependencies window, and the task-related information displays, enter one of the following Dependency Types:

   - **Starts after:** This creates a relationship where the active task cannot start until the related task finishes.

   - **Starts together with:** This creates a relationship where both tasks must start at the same time.

   - **Finishes together with:** This creates a relationship where both tasks must finish at the same time.

   - **Finishes before:** This creates a relationship where the active task cannot finish until the related task starts.

3. In the Related Task Field, select the task number of the task for which you want to create the dependency. Tasks which are not yet scheduled alone can be selected to establish dependencies.

   This action populates some of the dependency fields with task-related information for the dependent task, such as Subject, Task Type, Status, and Planned Effort.

4. Save your work.

Overview: Parts Search and Ordering

The Parts Search and Ordering functionality enables the technician, dispatcher or other field service user to create a parts requirement, search for available parts in the field

service supply chain, select the closest or most cost effective source and generate an order for the parts that are found. The Parts Requirement page is used to define the parts required for the task. For more information about Parts Search and Ordering, see the *Oracle Spares Management User Guide*.

To Use Parts Search and Ordering:

1. Navigate to the Parts Search page from the FSTP, FSAP Dashboard or the Part Requirement Find page or The Service Request page.

2. Enter Item Number and Quantity to search the parts.

3. Enter or select the Distance, Address Type, Ship To, and Destination Location (Warehouse) in the Header Region to link the order to a service request and task.

4. Click the Go button.

5. The Search Results page displays the results with the parts that are available in the Subinventory selected.

   Note: The Parts Search Results page provides a Map link to view with location details for each item/part.

6. Click the Receive Parts link from the Dashboard, after selecting the source and parts in the Search Results page to create an inbound order or a reservation automatically.

   Note: After you create an order or a reservation, the Parts Requirement and Order sub-region appears.

7. In the Part Requirement and Order region, define the part requirement and view an order or a reservation details.

8. Click the Cancel button to exit the Parts Search page and return to the FSTP or FSAP Dashboard.

Creating Parts Requirements Automatically for Tasks

Advanced Scheduler functionality uses parts search and availability information from Spares Management to schedule and assign tasks to technicians based on both technician and parts availability. Advanced Scheduler now offers flexibility to make the spare parts requirement as mandatory constraint or as a soft constraint, and is dictated by the Spares Mandatory parameter value. If it is set to Yes, then the parts requirement will become a hard constraint. Scheduler and Spares Management modules will only

look for options where technicians can be scheduled by making sure that all the required parts are available or will be made available. By setting this parameter to No, you can make the parts requirement a soft constraint. In this case the Spares management module will identify all technicians possessing all or a few of the required parts and this information is used by Scheduler to cost the options of technicians appropriately, by using the cost factor - Parts Violation Cost to add additional cost for all missing parts.

There are two methods for creating parts requirements:

- Create Parts Requirements Automatically, page 2-12

- Create Parts Requirements Manually, page 2-14

Many field service operations execute certain tasks frequently, and the required parts for these tasks are known.

In the Spares Management Task Parts, you can predefine parts required for a task template and product. When you create a service request for that product and a task from a template linked to the product with parts defined, a parts requirement generates automatically. For details, see the Task Template and Task Parts setup sections in the *Oracle Field Service Implementation Guide*.

You define spare parts associated with a product and a task template during Field Service implementation. For more information on creating a service request and creating tasks from a task template, see the *Oracle TeleSupport User Guide*.

Prerequisites

❒ Task templates have been predefined.

❒ Task parts definitions have been created in Spares Management for the product and task template.

❒ Sub-inventories have been defined and assigned to specific organizations.

Steps:

1. Navigate to the Service Request window, page A-2.

    The Service Request window appears.

2. To create a service request using the task template functionality, create a basic service request, navigate to the Tasks tab, and then click Use Template.

    The Create Tasks from Template Group window appears.

3. In the Create Tasks from Template Group window, select the Template Group that corresponds to the task template you want to use.

The parts requirement creates automatically when parts have been predefined for the product from the service request and the task template used to create the task.

Viewing and Manually Creating Parts Requirements

In this scenario, a technician or dispatcher determines that some parts required for the task are not in stock. The dispatcher or field manager manually creates a parts requirement, and then uses the parts requirement information for creating an internal order.

For details about creating an internal order, see Creating an Internal Order or a Parts Reservation in the *Oracle Spares Management User Guide*.

The Parts Requirement window is divided into four parts:

- Header Information: Service Request or Repair Order, Task, Resource Type, Resource Name, Requirement Number, Destination Organization, Destination Sub-inventory, Need-by Date, and Order Type.

- Ship To Address region: Engineer (technician), Customer, or Special address.

- A tabbed region: On the Requirement tab, you specify items to be added to the parts requirement. The Source tab provides the supplier organization and source

sub-inventory. The Order tab provides order status information.

- The final region contains fields for Item Description and Item Scratch pad.

> **Note:** When an Inventory item number is unknown, technicians can enter a designated placeholder part number previously set up in Oracle Inventory in the Required Item field of the Requirement tab. Then enter descriptive details in the Item Scratch pad field, such as supplier and supplier part number. This information can be used to search the Inventory Item Master to find the actual item or set up a new item.

Use this procedure to view an existing, or manually create a parts requirement:

Prerequisites

❐ Destination organization is setup.

❐ Inventory items are setup.

Steps:

1. Navigate to the View Parts Order Status window, page A-2.

   The View Parts Order Status window appears.

2. To search for existing part requirements, use the View Parts Order Status window and the Find function. Enter search criteria, and then click Find.

   You can inquire by Order number, order Status, Item ID number, Source Organization, Service Request number, Resource Type, Resource name, Requirement number, Task number, Waybill, and Carrier. Other search criteria include Order By, Need By, and Promise dates.

3. To create a new parts requirement, from the View Parts Order Status window, click New.

   This closes the View Parts Order Status window, and the Part Requirements window appears.

4. If you are creating the parts requirement for a specific service request or task, enter the Service Request number. If you know the Task number, enter it.

   - If the Task number is entered, the Service Request number attached to the task is automatically entered.

   - If the Service Request is entered, the Task can be selected from the list of values

of tasks associated with the service request.

- If a resource has been assigned to the task, the Resource Type and Resource Name fields are automatically populated.

- If they have been set up for the resource, the Destination Organization, Destination Sub-inventory, and address are automatically entered.

5. Select a Destination Organization and Destination Sub-inventory.

   The destination organization and sub-inventory automatically populate when a technician is assigned to the task and the technician has a usable sub-inventory assigned. If the technician has more than one usable sub-inventory assigned, then the technicians default sub-inventory is used.

6. Enter a date in the Need By Date field.

   The Order Type field appears by default from the order type defined in the profile option CSP: Order Type. You can override the default setting by selecting a different Order Type from the list of values.

7. In the Ship To region, select the option for the address that you want to ship the parts to: Engineer, Customer, or Special.

   Engineer appears selected by default, and the engineers default address is displayed.

8. If you select the Special option, enter the Country, Address, and Time Zone fields, and then click Save.

   This address joins the engineers list of addresses.

9. To change addresses, click the Addresses button, and then select the new ship to address from the list of values. Click OK.

10. In the Required Item field of the Requirement tab, enter the item number you want to assign to this parts requirement.

11. In the Required Quantity field, enter the quantity needed for the parts requirement.

12. Repeat steps 10-11 for each item to be added to the parts requirement.

13. (Optional) Select the Order tab to view order details such as Supplied Item, Source Type, and Document Number.

14. Click Save to create a parts requirement.

   This creates a Requirement Number for accessing the parts requirement record at a later time.

Receiving Parts from the Dispatch Center

Technicians order and receive spare parts into their respective sub-inventories to replenish their trunk stock. If technicians are expecting shipments but are traveling or at the customer site where they cannot access Mobile Field Service or the Field Service Technician Portal, the dispatcher can receive parts from the Dispatch Center on their behalf.

You can use the Receive Parts menu option on the technician right click menu either in the Plan Board or Gantt view to receive one or more shipments of parts for a technician. The Receive Shipments page that opens is the same one that opens from the Oracle Field Service Technician Portal. For information on this page and how dispatchers can work in this page to receive parts for a technician, see Receiving Shipments, page 8-27.

Creating Follow-up Tasks from the Dispatch Center

Follow-up tasks are usually created after the technician has arrived at the customer site and finds missing parts in the trunk stock, finds that the task in hand requires a different skill set, or finds a new issue at the site. The technician then creates a follow-up task using Mobile Field Service or the Field Service Technician Portal. If the technician does not have access to these applications, the dispatcher can create the follow up task for the technician from the Dispatch Center.

You can create a follow-up task for a scheduled task from the Planboard, and the Scheduling or Gantt Chart using the appropriate option on the task right click menu. The Create Follow-up Task page opens with task type, status, and priority, and planned time and effort automatically populated. This is the same page that the technician uses to create such a task from the Field Service Technician Portal. For information on the fields on this page, see Creating and Scheduling Follow-Up Tasks, page 9-4.

After you enter the task subject and description and save the task, this task is created for the same service request as the original task. You can immediately schedule this task from the Create Follow-up Task page, assign it to the appropriate technician, and commit it in the same way as a regular task.

After you create this task and save it, you can update key task attributes for this task from the Dispatch Center. To update other task attributes, you must navigate to the source service request document for the task.

3

Understanding Skills Management

This chapter covers the following topics:

- Overview of Understanding Skills Management
- Assigning Skills to Tasks
- Assigning Skills to Task Templates
- Associating Skills to Technicians

Overview of Understanding Skills Management

For each task you can assign the desired skills (product and non-product) and skill levels. In addition, you can associate skills to each technician. This makes it possible for Advanced Scheduler to match task skill requirements to the skill sets of the available technicians.

Skills can be product oriented, such as model TCT-500, or non-product oriented, such as language skills (French). You can also define and match skills at the product category level, such as Computers, which is ideal for companies that are managing a high volume of products and want to simplify the skills management process.

For information on setting up skills and skill levels, see Setting Up Skills Management, *Oracle Field Service Implementation Guide*

Setup topics include:

- Setting Up Rating Scales and Skill Levels

- Defining Skill Types and Skills

This chapter covers the following topics:

- Assigning Skills to Tasks, page 3-2

- Assigning Skills to Task Templates, page 3-2

• Associating Skills to Technicians, page 3-3

Assigning Skills to Tasks

After skills and skill levels are set up, use this procedure to assign skills and skill levels to tasks. The application supports product and product category skill levels.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Click on the Planboard icon.

3. Select a task.

4. From the Navigate window, select Skills Assignment. The Skill Assignment window appears with the Task tab active.

5. In the Skills block, select a skill type such as Product Skill, Product Category Skills, or Language from the Type LOV.

6. Select the skill name from the Name LOV.

7. Select the skill level from the Skill LOV.

8. Save.

> **Note:** You can select the Disable Skill check box if Advanced Scheduler should not take this skill into account.

Assigning Skills to Task Templates

You can assign skills to task templates at the product category level.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Click on the Planboard icon.

3. Select a task.

4. From the Navigate window, select Skills Assignment. The Skill Assignment window appears.

5. Select the Task Template tab.

6. In the Task Template block, select a group from the Template Group name.

7. Select a task template from the Task Template list.

8. In the Skills block, select the desired skill (Product Category, Product, Non-Product) from the Type LOV.

9. Select the category from the Name LOV.

10. Select the skill level from the Skill LOV.

11. Save.

> **Note:** You can select the Disable Skill check box if Advanced Scheduler should not take this skill into account.

Associating Skills to Technicians

You can associate skills such as product skills, product category skills or language skills to technicians, from the Dispatch Center.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Click on the Planboard icon.

3. Right click a technician name.

4. Select Resource Skills Management. The Skill Management window appears with the Resources tab active.

5. In the Skills block, select a skill such as Products or Language, from the Type LOV.

6. Select the category from the Name LOV.

7. Select the skill level from the Skill LOV.

8. Save.

4

Scheduling Field Service Tasks

This chapter covers the following topics:

- Overview: Call Center Booking
- Overview: Schedule Task Window

Overview: Call Center Booking

The process for booking appointments for field service requests in the call center generally follows this sequence:

1. Access the Schedule Task window from the Service Request Task tab.

2. Choose a mode of scheduling assistance.

3. Depending on assistance mode, specify scheduling preferences and parameters.

4. Launch one of several scheduling process alternatives.

5. Review the scheduling advice using the Advice tab.

6. Depending on the scheduling process, select a scheduling alternative, or enable the system to make the selection automatically.

7. Release the schedule of work to the field.

Overview: Schedule Task Window

The Schedule Task window contains a Preferences tab and an Advice tab.

Preferences Tab

In the Resources region of the Preference tab, you specify whether you want resource

selection to be based on matching territory qualifiers, a preferred resource defined in Contracts, a resource associated to the Install Base instance, or a resource with skills. You can also suggest a specific resource to perform the task. Additionally, you can enable the Scheduler to consider stand by resources while scheduling.

In the Overrule region, you can specify a planned start and planned end date and time to constrain the scheduling solution to the given window of time.

When service parts are associated with tasks, in the Spares region you determine whether the Scheduler should mandatorily check for availability of all parts or it can process resources with missing parts too. Additionally, you can specify whether the Scheduler should check warehouses and technician's trunk stock for availability of the needed service parts.

In the Time Zone region, you can specify the Corporate, Incident, and User times zones, if they are different from each other.

In the Routing Mode region, you can specify whether or not street routing is to be factored into scheduling. Select the Route Based check box to include street routing.

The Task Details region provides task number, planned start and end dates, and estimated effort duration. Check boxes indicate which of the following special circumstances apply for the task to be scheduled:

• Task Dependencies

• Customer Confirmation Required

• Parts

• Access Hours

• After Hours

Advice Tab

The Advice tab displays the retrieved plan options available for the scheduling process. Depending on the scheduling assistance level and process used, the Advice can display several schedule alternatives for the dispatcher to choose, or the selection can be automated by the system. Additionally, the Advice tab displays the shift type of the technicians. You can view a technician's work history by clicking on the technician's name.

For example, if you choose the intelligent scheduler option and any of the Territory Qualifiers, Contracts, Installed Base, or Skills check boxes, the Scheduler displays a list of suggested resources in the Advice tab. You can click on the name of a resource to view the service history of the resource. The history lists the service requests attended by this resource for instances of the current task, products, or customers. You can also use this page to view the service history of other suggested technicians for this task.

The Advice tab also displays Spares Related Information using the following fields:

Arrival Date, Warehouse, Shipment Method, Distance, and Shipping Cost.

Accessing the Schedule Task Window

You can access the Schedule Task window by selecting the Schedule menu option on the right click menu for a task in the Dispatch Center tasks list table and in the Overview tab of the Task View.

You can also open this window from the Tasks tab of the Service Request window. To do this use the following procedure.

Prerequisites

The selected task is open for scheduling.

The task type is mapped to the Dispatch rule.

Steps

1. Navigate to the Service Request window, page A-2 Tasks tab.

   The Find Service Request window appears.

2. Find a task that has not already been assigned in the Results table and click OK.

   The Service Request window appears with information populated for the task.

3. Select the Tasks tab.

   The Tasks tab appears.

4. Click the Schedule Task icon located next to the Assignee field.

   The Schedule Task window appears. You can sort using any of the displayed columns in this window.

Specifying Preferences for Scheduling Tasks

Use this procedure to specify the preferences for scheduling tasks:

Steps

1. Navigate to the Schedule Task window, page A-2.

   When the Schedule Task window is invoked, by default it tries to retrieve plan options for the resources eligible to perform the task based on the following parameter settings:

   • Resource Preference

   • Consider Standby Shifts

- Prefer Contract Resources

- Prefer IB Resources

- Prefer Skilled Resources

- Prefer Territory Resources

- Router Mode

Additionally, the Schedule Task window uses the CSF: Default Scheduling Type profile option.

You can set the parameter and profile values based on the business requirement.

If you want to refine the search, you can navigate to the Preferences tab and modify the initial search criteria.

2. Based on the scheduler parameters set for the scheduler rule, the Territory Qualifiers check box is either selected or deselected by default. If the Territory Qualifiers check box is selected all territory qualifier attributes are also selected and the Select All check box is also selected. You can deselect the Select All check box to individually select the attributes that you require to be considered when matching resources. If the Territory Qualifiers check box is not selected by default, the Select All check box is also not selected and the territory qualifier attributes are grayed out. In this case, select the Territory Qualifiers check box to select all territory qualifier attributes. To pick and choose your attributes, select the Territory Qualifiers check box, then deselect the Select All check box and individually select the required attributes.

> **Note:** Based on the territory attributes that you specify for resource selection, Scheduler returns plan options for non-preferred resources that are part of the winning territories and preferred resources from Contracts or Installed Base. Scheduler then removes duplicate resources and applies the Preferred Resource Violation Cost, cost factor to each plan option before displaying the final list of resources and the resource source in the Advise tab of the Schedule Tasks window.

3. To suggest a specific technician to be assigned, in the Resource Type field, select Employee Resource from the list of values. In the Resource Suggestion field, select the technicians Resource Name from the list of values.

4. If required, then change the default value in the Consider Standby Resources field to modify the search criteria.

5. If you set the Resource Preference parameter value to Prefer Third Party Resources,

then Scheduler ignores all other constraints except resource availability for the planned dates and spares and skill requirements for the task. For more information, see Third Party Scheduling and Management in the *Oracle Advanced Scheduler User Guide*.

Selecting a Scheduler Option

The Preferences tab of the Schedule Task window contains an Assistance Level region. The Assistance Level region offers three Assistance modes.

- Intelligent

- Window to Promise

- Assisted

Use this procedure to select an assistance mode for scheduling tasks.

Steps

1. Navigate to the Field Service Dispatch Center window, page A-2.

2. From the Dispatch Center, populate the tasks list table with tasks. See Populating the Dispatch Center Tasks List Table, page 5-2

3. To schedule tasks interactively, access the Schedule Task window. In the tasks list table, right-click on the task you want to schedule, and then select Schedule from the popup menu.

   The Schedule Task window appears with plan options for the selected task. Switch to the Preferences tab.

4. Select one of the three Assistance Level options to indicate which option you want to use for scheduling the selected task. For more information see:

   - Scheduling Using the Intelligent Option, page 4-6

   - Scheduling Using the Window to Promise Option, page 4-7

   - Scheduling Using the Assisted Option, page 4-8

Using Interactive Scheduling

The section below elaborates the behavior when different scheduling modes are selected manually in the Schedule Task window.

Interactive scheduling includes the following Scheduling modes:

- Intelligent

- Window to Promise

- Assisted

as well as choosing the Auto Schedule background process after selecting tasks in the task list. See

- Scheduling Using the Intelligent Option, page 4-6

- Scheduling Using the Window to Promise Option, page 4-7

- Scheduling Using the Assisted Option, page 4-8

Scheduling Using the Intelligent Option

The Intelligent option is only available when Oracle Advanced Scheduler is installed. Use the Intelligent option to assign a task to a resource based on selected criteria.

Prerequisites

Oracle Advanced Scheduler is installed.

Steps

1. Navigate to the Schedule Task window, page A-2 from the Field Service Dispatch Center window.

   The Schedule Task window appears with plan options for the selected task. Switch to the Preferences tab.

2. Select the Intelligent option in the Assistance Level region.

3. In the Resources region, select the Territory Qualifiers, Contracts, Installed Base, or Skills check box. Select a check box to indicate resource selection based on matching territory qualifiers, a preferred resource defined in Contracts, a resource recommended from Installed Base, and resource Skills.

4. Based on the scheduler parameters set for the scheduler rule, the Territory Qualifiers check box is either selected or deselected by default. If the Territory Qualifiers check box is selected all territory qualifier attributes are also selected and the Select All check box is also selected. To pick the attributes that you want the system to consider when matching resources, deselect the Select All check box and individually select the required attributes. If the Territory Qualifiers check box is not selected by default, the Select All check box is also not selected and the territory qualifier attributes are grayed out. In this case, to select all attributes, select the Territory Qualifiers check box. To select required attributes, select the Territory Qualifiers check box and then deselect the Select All check box.

5. If you want a specific technician to be considered in addition to those matching the previously specified criteria, in the Resource Suggestion field, select a Resource Name from the list of values.

6. Select an applicable value in the Consider Stand By Resource field, if you want the scheduler to consider technicians working in the stand by (After Hours) shifts.

7. (Optional) If service parts are associated with the task, in the Spares region, you determine whether the Scheduler should mandatorily check for availability of all parts or it can process resources with missing parts too. Additionally, you can specify whether the Scheduler should check warehouses and trunk stocks of technicians for availability of the needed service parts.

8. Click Search.

   The list of qualified resources displays in the Advice tab.

9. Select the check box next to a resource (technician) to indicate your resource choice.

   The Start and End fields are populated with the scheduled date.

10. Click Schedule.

    The task is scheduled to the selected technician. The Plan Board and Gantt views are refreshed.

Scheduling Using the Window to Promise Option

The Window to Promise option is only available when Oracle Advanced Scheduler is installed. This feature is useful if the service representative or dispatcher is talking directly with the customer. The Window to Promise option provides the ability to find available time slots (predefined time windows) of technicians based on a selection criteria using Advanced Scheduler functionality. Possible time slots, along with related cost, display for you to offer to the customer.

After using the Window to Promise option to assign a task, a time slot is reserved for a customer and the Planned Start and End dates are set accordingly. A time slot is also assigned to a resource at the time of scheduling. Later in the process, you can assign the task to another resource, or use Advanced Scheduler algorithm to optimize the trip.

Prerequisites

Advanced Scheduler is installed.

Steps

1. Navigate to the Schedule Task window, page A-2 from the Field Service Dispatch Center window.

   The Schedule Task window appears with plan options for the selected task. Switch to the Preferences tab.

2. Select the Window to Promise option in the Assistance Level region.

3. In the Resources region select the Territory Qualifiers, Contracts, Installed Base, or Skills check box. Select a check box to indicate resource selection based on matching territory qualifiers, a preferred resource defined in Contracts, a resource

recommended from Installed Base, and resource Skills. Also select if you want to check resources availability.

4. When you select the Territory Qualifiers check box, the table of attributes is enabled. Select as many attributes as desired for consideration during territory qualification.

5. If you want a specific technician to be considered in addition to those matching to the previously specified criteria, in the Resource Suggestion field, select a Resource Name from the list of values.

6. Select an applicable value in the Consider Stand By Resource field, if you want the scheduler to consider technicians working in the stand by (After Hours) shifts.

7. In the Spares region, determine whether the Scheduler should mandatorily check for availability of all parts or it can process resources with missing parts too. Additionally, you can specify whether the Scheduler should check warehouses and trunk stocks of technicians for availability of the needed service parts.

8. Click Search.

   The plan options with available time slots and related cost display in the Advice tab.

9. (Optional) Select from View Window list of values to view only the options for a certain time slot. For example, if the customer requests a morning appointment. Select Morning from the list of values, and only the available morning time slots display for selection.

10. Select the check box next to a time slot to indicate the time slot of your choice.

    The Planned Start and End date for the task is set accordingly.

11. Click Schedule.

    A task assignment is created. The Plan Board and Gantt views are refreshed.

    > **Note:** The Window To Promise option is not enabled for Parent/Child model tasks and tasks with the After Hours flag set.

Scheduling Using the Assisted Option

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

Steps

1. Navigate to the Schedule Task window, page A-2 from the Field Service Dispatch Center window.

   The Schedule Task window appears with plan options for the selected task. Switch to the Preferences tab.

2. Select the Assisted option in the Assistance Level region.

3. In the Resources region select the Territory Qualifiers, Contracts, Installed Base, or Skills check box. Select a check box to indicate resource selection based on matching territory qualifiers, a preferred resource defined in Contracts, a resource recommended from Installed Base, and resource Skills. Also select if you want to check resources availability.

4. If you want a specific technician to be considered in addition to those matching the previously specified criteria, in the Resource Suggestion field, select a Resource Name from the list of values.

5. Select an applicable value in the Consider Stand By Resource field, if you want the scheduler to consider technicians working in the stand by (After Hours) shifts.

6. Click Search.

   The list of qualified resources displays in the Advice tab. Already assigned tasks appear in blue, and schedule options in green.

7. Select a check box next to a resource to indicate your resource choice.

   The Start and End fields are populated with the scheduled date.

8. Click Schedule.

   A task assignment is created and the Plan Board and Gantt chart are refreshed.

   For information on scheduling details, see the *Oracle Advanced Scheduler User Guide.*

Scheduling Tasks Automatically

You can automatically schedule a single task or multiple tasks directly from the Dispatch Center window. The applied scheduling criteria comes from the Advanced Scheduler default settings.

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

Prerequisites

Advanced Scheduler is installed.

Steps

1. Navigate to the Field Service Dispatch Center window, page A-2.

2. From the Dispatch Center, populate the tasks list table with tasks. See Populating the Dispatch Center Tasks List Table, page 5-2. Select one or multiple tasks, that you want to schedule, from the task table using the mouse and shift buttons.

3. Right click and select the Auto Schedule option.

    > **Note:** While the autonomous scheduling process is running, you can continue to perform other work.

4. Click Refresh to view the schedules in the Plan Board or Gantt Chart.

    You can view rejected tasks and the reason for their rejection in the Dispatch Center's Tasks List table.

    > **Caution:** If one or more tasks are rejected, you must resolve the issue for the rejected tasks. Then the Auto Schedule process needs to be re-initiated to schedule the remainder of the tasks. See Working with Tasks Rejected by Autonomous Scheduling, page 5-24

5. The alternative method is to run the Autonomous Scheduler batch (concurrent) program to schedule tasks automatically 'in the background', in other words, without user intervention. Autonomous Scheduler is setup during implementation.

Launching Autonomous Scheduler

Follow this procedure to run the Autonomous Scheduler concurrent program:

Steps

1. Navigate to the Submit Requests window, page A-2 for the Autonomous Scheduler program.

    The Parameters window appears in the foreground of the Search and Schedule Auto window.

2. In the Parameters window, select a Task List Query from the list of values. Click OK.

    The Parameters window closes. The selected query appears in the Parameters field of the Search and Schedule Auto window.

    Optionally, enter the Task Query name as the parameter for Autonomous Scheduler program. You can run this program periodically by scheduling it to run as

frequently as needed.

3. Click Submit.

Supporting Location Time Zones

When customers and service personnel are located in different time zones, it is useful to communicate dates and times in the time zone where the service task is performed, without having to manually convert the dates and times displayed on their windows. All Field Service and related products provide, where appropriate, full support for customer, incident, and technician time zones.

With this capability, call center agents, dispatchers, managers, and administrators can communicate with customers and field technicians in their local times without having to make mental conversions. This reduces scheduling mistakes and improves the customer experience.

This time zone functionality supports customer and incident address time zone, technician time zone, and daylight savings time.

The Field Service windows that support incident address time zone are:

- Schedule Advice Popup – Advice Tab Table View

- Schedule Advice Popup – Advice Tab Gantt View – Task Tool Tip

  Since the Gantt Chart displays tasks for many different incidents against a single time line, it is not feasible to support incident address time zones in the Gantt graphical display. However, incident time zone is supported in the Task Tool Tip.

- Dispatch Center – All Views – Active Task Details Line Planned Start and End Dates and Times

- Dispatch Center – Task Detail View – Overview Tab Scheduled Dates and Times

- Service Administrators Portal – All Date and Time Fields

Definitions

- The *Service Request Incident Address* is the location where service was performed on an asset or customer product.

- The *Task Address* appears by default from the Service Incident Address, and the dispatcher can correct it.

5

Managing Field Service Task Schedules

This chapter covers the following topics:

- Introducing the Dispatch Center
- Populating the Dispatch Center Tasks List Table
- Working with Tasks
- Working with Resources
- Working with the Map View
- Committing Schedules
- Rescheduling Tasks

Introducing the Dispatch Center

Using the Dispatch Center for scheduling tasks involves:

- Populating the Dispatch Center with information for the appropriate subset of technicians. See How the Dispatch Center Populates With Information, page 2-2.

- Selecting tasks to be scheduled.

- Completing one of the following task scheduling methods:

  - See Scheduling Tasks Automatically, page 4-9

  - See Using Interactive Scheduling, page 4-5

Opening a Different View of the Dispatch Center

To switch between Dispatch Center views, click the appropriate Tasks, Plan Board, Gantt, or Map icons located near the top right of the window.

Using the Dispatch Center Navigate Menu

You can access many other features and functions from the Dispatch Center tool bar Navigate menu:

- Schedule Management

- Access Hours

- Task Dependencies

- Parent/Child

- Skills Assignment

- Parts Requirement

- Source Document

- Customer Confirmation

- Select Territories and Task Owners

- Resource Addresses and Sub-inventories

- Resource Skills Management

- Service History

- Spares Management

Populating the Dispatch Center Tasks List Table

The Dispatch Center provides two methods to search for tasks: Basic search and Advanced search. *Basic* search criteria include task details, customer details, task owner, dates, and whether the task can be scheduled.

The *Advanced* search feature enables searching by constraints, such as Access Hours, whether there is a dependency relationship, whether the task is longer than a shift, or whether the task requires customer confirmation. Further, you can search by date range, specific date, after (greater than) a specific date, and prior to (less than) a specific date.
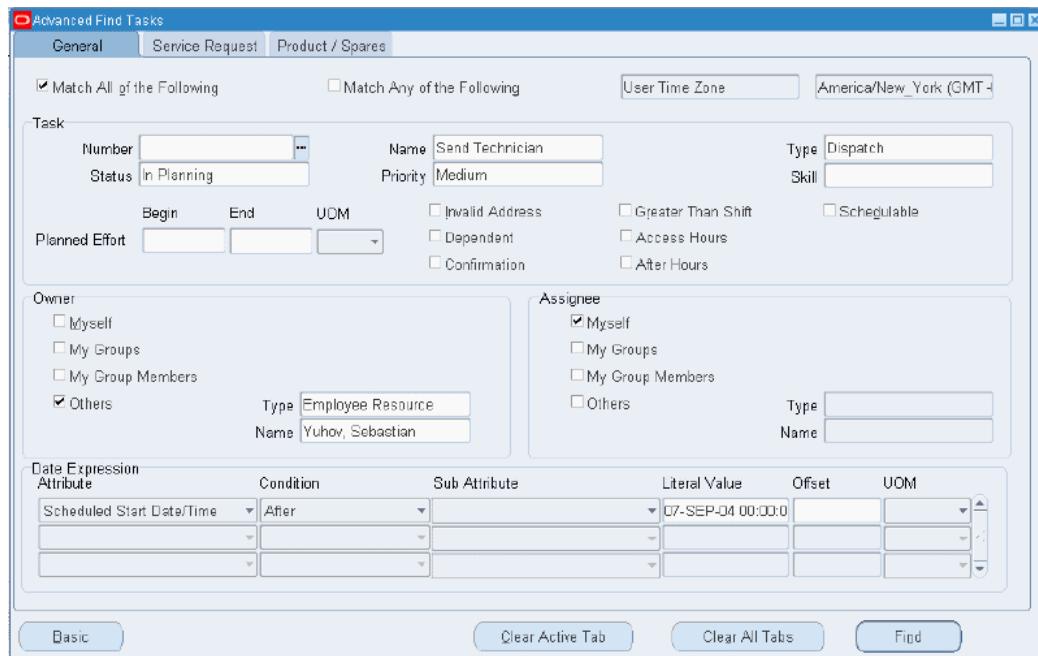
Seeded Task Query Definitions

Query Name	Description
All Open	All tasks that are available for planning and can be scheduled.
Assigned	All tasks that are already assigned to a resource. These tasks have an assigned schedule start date and the 'Assigned' attribute is set to 'Yes.'
Auto Rejected	All tasks that are rejected by the Autonomous Advanced Scheduler (status: Auto Rejected).
Auto Scheduling	All tasks that can be scheduled by the Autonomous Advanced Scheduler.
Closed	All Closed tasks. These Tasks have Closed status set to 'Yes'
Commit Candidates	All tasks that are scheduled and have a planned status and that have to be executed in the next four hours from now.
Escalated	All tasks that are marked as 'Escalated' and are not 'Closed'.

Query Name	Description
Inbox	All tasks created today (current date) that have task type and status that allow scheduling, and the schedule start date is NULL.
Invalid Address	All tasks with an address marked as Invalid. These tasks have the VALIDATED_FLAG set to 'No.'
My Inbox	All tasks owned by this dispatcher. These tasks are owned by the current application USER ID and Resource Type 'Employee'.
Non Schedulable	All tasks that cannot be scheduled.

Monitoring and Managing Tasks Belonging to Other Dispatchers (Task Owners)

Dispatchers sometimes oversee tasks owned by other dispatchers (schedule technicians, manage exceptions, and so on) to assume the responsibilities of dispatchers who are on leave. The Dispatch Center window enables dispatchers to select the task owners dynamically, and then view and manage tasks owned by other dispatchers. Dispatchers can interactively select multiple task owners.

For more information, see Setting Up Query Selection for Task Owner Enforcement, *Oracle Field Service Implementation Guide*.

Steps:

Use this procedure to populate the Tasks List Table in the Dispatch Center.

Using a Predefined Query to Populate the Tasks List Table

1. Navigate to the Field Service Dispatch Center window, page A-2.

   The Dispatch Center window appears to the Tasks view.

2. To use a predefined query to search for tasks, make a selection from the 'View By' list of values located near the top of the Tasks region. Seeded queries are described in the previous table.

   The Task List Table populates with tasks matching the predefined query.

Using Basic Search to Define a Query

3. To use basic search functionality to find tasks that do not conform to one of the predefined queries, click the flashlight icon on the tool bar.

   The Advanced Find Tasks window appears.

4. Click Basic at the bottom of the window to open the Basic Find Tasks window.

   The Basic Find Tasks window appears.

   In the Basic Find Tasks window, you can create queries based on combinations of the following search criteria:

   • Task or service request number

   • Task or service request name

   • Tasks that you own

   • Tasks that are assigned to you

   • Tasks for a specific customer

   • Tasks that need to be scheduled

   • Tasks that have been scheduled

   • Tasks that have been started for a selected date or date range

5. Enter search criteria in the available fields, and then click Find.

   The tasks list table of the Dispatch Center populates with tasks matching the basic query definition you specified.

Using Advanced Search to Define a Query

6. To use advanced search functionality to find tasks that do not conform to one of the predefined queries:

   • From the Field Service Dispatch Center window, click the flashlight icon on the tool bar, or

   • From the Basic Find Tasks window, click Advanced.

   The Advanced Find Tasks window appears.

7. On the General tab of the Advanced Find Tasks window, select a check box to indicate whether you want the search to return tasks that match *any* of the specified criteria, or retrieve only those tasks that match *all* of the specified criteria.

8. Next, on the General tab specify any combination of search criteria. For example, you can enter task search criteria followed by constraints, such as access hours, the existence of task dependencies, effort of task, and need for customer confirmation. You can also add owner and assignee criteria to search for scheduled tasks. You can also search by one or more of the date attributes given below.

- Attribute (such as Actual End Date)

- Condition (such as Before or Equal to)

- Sub Attribute (such as Scheduled End Date)

- Literal Value (calendar date)

- Offset (number)

- UOM (such as days, or weeks)

9. Select the Service Request tab and select any combination of service request information.
    - Service Request region
        - Number

        - Urgency

        - Type

        - Project Number

        - Project Task Number

        - Preferred Resource - Installed Base or Contract

    - Customer region
        - Type

        - Name

        - Number

        - Site Name

        - Site Number

        - Postal Code

        - City

        - Account

        - Contract Type

10. Select the Product/Spares tab and select a combination of product and spares information.

- Product region

  - Item

  - Item Description

  - Item Instance

  - Serial Number

  - Lot

  - Revision

- Spares region

  - Required Item

  - Required Item Description

  - Internal Order Status

11. Click Find.

    The tasks list table of the Dispatch Center populates with tasks matching the advanced query definition you specified.

Saving and Editing Query Definitions

12. To add this query definition to the View By list of values for the tasks list table, select Save Query As from the Tools menu on the tool bar.

    The Save Query As window appears.

13. Enter a Name and Description for the query. Select the Public check box if you want this query to be accessible to all. Click OK.

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

14. To edit a query, select Edit Query from the Tools menu on the tool bar.

    The Edit Query window appears.

    You cannot modify the query information, but you can enter an End Date for an obsolete query. When the Active End date is reached, the query disappears from the list of view by query values at the top of the Dispatch Center window. Repeat steps 3 through 11 or define a new query, and then add it to the View By list of values.

Sorting the Tasks List Table

15. You can use the tasks list table sort functionality from the right click menu to organize the list of retrieved tasks into ascending or descending order for up to three ranks of criteria. For ease of sorting, each of the three sort criteria display the entire list of task attributes that are available in the tasks list table.

For example, set the primary sort to be by planned effort in descending order. The longest task appears first in the list. Then set the secondary sort to be by planned start date in ascending order. Tasks of equal effort are further sorted with the task having the earliest planned start date appearing first. Finally set the tertiary sort to be by actual end date in descending order. Tasks having the same effort and planned start date are further sorted so that the task with the latest completion date appears first.

From the right click menu of the tasks list table, click **Sort**.

The Sort window appears.

16. In the Sort By section, select the primary sort criterion from the list of values, and then click the radio button to indicate whether to sort in ascending or descending order.

17. (Optional) Specify the secondary and tertiary sort criteria and sort order.

18. Click **Sort**.

The Task List Table sorts according to the specification.

19. To view the source document associated with a task, right-click the task in the tasks list table.

The right-click menu appears.

20. Select 'Source Document' from the right-click menu.

> **Note:** It is not necessary to also select the task by checking the check box .

The source document, for example, the Service Request window appears. See Viewing Service Request Details, page 5-18.

21. To display the window listing the required parts for a task, select Parts Requirement from the right-click menu.

The Parts Requirement window appears. It is possible to add parts requirements at this time. See Viewing and Creating Parts Requirements, page 8-29

22. To assign the task, select Schedule from the right-click menu.

The Schedule Task window appears. Open the Advice tab. See Scheduling Tasks, page 4-1

When the task cannot be scheduled, this option is not available.

Working with Tasks

Dispatch Center displays the Task Table view consistently in the upper half of the user interface and is visible in Plan Board, Gantt (scheduling) Chart, and Map Views. The application queries the tasks based on the task query that you select in the View By drop down and populates the table view. After the Dispatch Center populates the table with tasks, you can review, sort based on any displayed task attribute, or schedule them.

Tabs

You can view the task details in the bottom half of the user interface in the Task Details View. The tabbed area provides additional detailed information. The following describes the information available on each tab. Most of the information displayed in these tabs is view only and cannot be updated.

Overview Tab

The Overview tab displays the task description, customer information, task urgency, and date details as described in the following table.

Overview Tab Fields

Field	Description
Subject	Descriptive name given to the task.
Task Number	Task number, generated at task creation. You can perform actions on this task by using the menu options on the right click menu. The right click menu options are the same as those available in the Tasks List table.
Task Type	Task type definition. For tasks that can be scheduled, the task type definition must be Dispatch. This setting is defined during implementation.
Task Status	Task status. This field indicates the stage of progress for the task. If required, dispatchers can update the task status from AutoReject to In Planning, Canceled to In Planning and In Planning to Canceled.

Field	Description
Priority	The degree of urgency assigned to the task.
Owner	The person or Dispatcher Group taking ownership for this task.
Assignee	Technician assigned to provide service. See also the Assignee field on the Resource tab.
Planned Start	The estimated start date given when creating this task from the service request.
Planned End	The estimated end date given when creating this task from the service request. Dispatchers can update planned start and end dates even after work has started on a task.
Scheduled Start	The time a service technician is scheduled to arrive at the customer site.
Scheduled End	Either the Start Date plus the Effort time, or when scheduled with Window to Promise, the End Date of the time window offered to the customer. Dispatchers can update scheduled start and end dates even after work has started on a task.
Planned Effort	This estimate made at the time a task is created indicates the planned amount of time needed to complete the task. Dispatchers can update this after the task is assigned to a technician, if required.
Actual Start and Actual End	These fields display the actual start and end times of the task work.
Actual Effort	This indicates the actual effort of the task.
Access Hours	Check box indicating the task has access hours assigned.
After Hours	Check box indicating the task is planned for after business hours.
Parent	Check box indicating the task is a parent task.

Field	Description
Child	Check box indicating the task is a child task.
Parts	Check box indicating spare parts need to be ordered. When Advanced Scheduler is installed this is done at task assignment.
Dependency	Check box indicating the task is part of a dependency relationship with another task.
Task Notes	Check box indicating that notes on the task exist.
SR Notes	Check box indicating that notes on the service request exist.
Customer Number	Customer number.
Customer Name	Customer name.
Account	Customer account number.
Incident Time Zone	The customer site time zone.
Scheduled Start and Scheduled End	The time range that technicians are planned to be present at the customer site, adjusted for the customer site time zone.
Actual Start and Actual End	The time range that technicians actually work at the customer site, adjusted for the customer site time zone.
Customer Confirmation	The dynamic button label indicates whether customer confirmation is required, not needed, or received. Click the Customer Confirmation button to open the Customer Confirmation window.
All Notes	Click on this button to view all existing notes for this service request in the Notes page.
Task Notes	Click on this button to view all existing notes for tasks in the Notes window, if any, and create new notes, if required

In addition, you can use and edit the descriptive flexfield provided to capture additional task information and use the flexfield provided to capture additional customer information. For more information on configuring these flexfields for use, see the *Oracle E-Business Suite Flexfields Guide*.

If you added attachments to this task when you created it, you can use the FND

attachment icon at the top of the page to display the attachments in the Attachment html page.

> **Note:** You can edit the task priority, task status, planned effort, and planned and scheduled start and end dates of tasks directly in the Overview tab for tasks irrespective of if they are scheduled, have received customer confirmation, have access hour restrictions, or have actual start and end dates.
>
> When you edit scheduling dates and times, scheduling validations are automatically done such as overlap with existing tasks, tasks falling outside the trip, and one task spanning trips.If you have set the CSF: Display warning messages in Dispatch Center to Yes, you can view all warning messages resulting from these scheduling validations together, in the List of Warning Messages window.
>
> For updates that you make to scheduled tasks to take effect, you must reschedule the task. For more information, see Overview: Rescheduling Tasks in this guide.

Service Request Tab

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

Service Request Tab Fields

Field	Description
Number	Service request number.
	Right-click the Number field to open a popup menu to access the source document (the Service Request window).
Type	Type of service request.
Unit	The service request belongs to this organization unit.
Created On	Date the service request was created.
Respond By	Date and time by which technician is obliged to visit customer site per service level agreement (SLA).
Resolve By	Date and time by which technician expects to close the service request per service level agreement (SLA).

Field	Description
Expenditure Organization	The expenditure organization specified in the service request. This field is hidden out of the box and can be displayed on personalization.
Project Number	The project number specified in the service request. This field is hidden out of the box and can be displayed on personalization.
Project Name	The project name specified in the service request. This field is hidden out of the box and can be displayed on personalization.
Project Task Number	The project task number specified in the service request. This field is hidden out of the box and can be displayed on personalization.
Project Task Name	The project task name specified in the service request. This field is hidden out of the box and can be displayed on personalization.
Summary	Brief summary describing the service request.
Problem	A problem description for the service request.
Resolution	A resolution description for the service request.
Contract	Service contract ID.
Service	Name of the service.
Description	Description of the service to which the customer is entitled.
Status	Contract status if active or expired.
Coverage	Description of service coverage and customer entitlement,
Warranty	The warranty check box is enabled if warranty on the contract exists. If enabled, you can click on the Warranty icon to see details of the service contract coverage in the Service Contracts Coverage window.
Start Date	Service start date.
End Date	Service end date.
SR Notes	Check box to indicate if notes exist on this service request.

Field	Description
Notes	Click this button to view existing notes and create new notes on this service request in the Notes window.
Service History	Click this button to view the service history for a customer site or a product. For more details, see Viewing Service History, page 5-19.
	Double-click the service request number in the Results block to access the Service Request window.

In addition, you can use and edit the descriptive flexfield provided to capture additional information on agents. For more information on configuring these flexfields for use, see the *Oracle E-Business Suite Flexfields Guide*.

Escalations Tab

This tab displays the escalations associated with the task.

Spares Tab

The Spares tab lists the spare parts necessary to resolve the task. If the task has already been scheduled or orders have been created, the Spares tab also provides status information.

To access the Spares Management application, select Spares Management from the Navigate menu on the tool bar. The Parts Search window appears enabling the search for specific parts. To view more details for the task selected, you can access the Parts Requirement window by clicking the Requirement Number link.

The Spares tab field displays the following fields:

Spares Tab Fields

Field	Description
Order Number	Internal order number or reservation number corresponding to Parts Requirement
Arrival Date	Arrival date of the parts
Warehouse	Source location of the required parts
Shipment Method	Shipment method used to ship the part from source to destination

Field	Description
Distance	Distance between the source and destination addresses
Shipping Cost	Cost to ship the parts from source to destination
Status	Order line status for the corresponding order number

For more information, see the *Oracle Spares Management User Guide*.

Product Tab

The Product tab displays details about the product stated in the service request as described on the following table. Additional information displays when the product is defined as an Install Base item. The Installed Base check box is selected, if Installed Base validation is selected on the service request.

Product Tab Fields

Field	Description
Item	Inventory Item identification number for the product.
Description	Product description.
Serial number	Serial number, if applicable.
Lot	Lot number, if applicable.
Revision	Item Revision number, if applicable.
Installed base	Indicates product is defined as an Install Base item.
Contract Type	The contract type for the product, if applicable.
Description	Description of the contract type.

In addition, you can use the descriptive flexfield provided to capture additional information on item instance. You can also edit this flexfield if installed base item is present for a customer. For more information on configuring these flexfields for use, see the *Oracle E-Business Suite Flexfields Guide*.

Resources Tab

When the task is scheduled, the Resources tab Assignee field displays the service technician assigned to the task, as well as their assignment status for the task. It also displays technician travel information such as, the scheduled travel duration and distance, and the actual travel duration and distance. If spatial data is installed, then scheduled travel time and distance are calculated by Advanced Scheduler. Without spatial data, default information displays.

Resources Tab Fields

Field	Description
Assignee	Name of the service technician to whom the task is assigned.
Type	Resource type such as, employee.
Scheduled Duration and Distance	The time and distance scheduled for travel to a service task site.
[Actual Duration and Distance	These fields reflect the actual time spent and distance traveled to a service task site.
Assignment Status	Displays the assignment status for the task.
	Dispatchers can update the task assignment status for a Field Service technician after the task is assigned (committed) to a technician. This field indicates the stage of progress for the task.
	Technicians can update this field when entering debrief information for the task using the Field Service Technician Dashboard.
	For more information, see Maintaining the Task Assignment Status for a Technician in this guide.

Address Tab

The Addresses tab displays addresses for the customer and the site of the product that needs service. The latter is also known as the incident address.

Contacts Tab

The Contacts tab displays the title, first name, last name, telephone number and extension, and e-mail address of the contact person. This can be the contact person of the service request or the contact person of the task, because these can be different. The contact person for the service request appears by default.

Skills Tab

The Skills tab displays the required skills for the task: Skill Type, Skill Name and Skill Level. If a skill has been disabled in the Skill Assignment window for the task, the Disabled check box is selected.

Access Hours Tab

This tab displays the customer access hours that are available for a task. This information is useful when, for business reasons, a customer needs to restrict the hours of access to perform a task. These hours are determined during task setup. There are two check boxes, one for Active Access Hours and one for After Hours. A task can be associated to either of these, but not both. A text box is present where any additional details can be entered. Hour fields are displayed for each day of the week.

Task Dependencies Tab

This tab displays whether a task is part of a dependency relationship.

For example, if a task requires the completion of a different task before it can begin, that relationship is noted. The information displayed includes, dependency type, related task, subject, task type, status, scheduled start, scheduled end, planned effort, assignee, actual start, actual end, and actual effort. The possible dependency options are Starts After, Finishes Before, Finishes Together With, and Starts Together With.

Parent/Child Tab

This tab displays the relationship of a set of tasks. When the effort of the task is longer than a regular work shift, Oracle Advanced Scheduler splits that task, called the "Parent" task, into multiple "Child" tasks, to accommodate and execute within the regular work shift of technicians. Parent task information is displayed on the top of the window and Child task information is displayed in a table below.

For example, a parent task effort is 12 hours. The parent task propagates two child tasks, one for an eight hour shift, and another for a four hour task.

> **Note:** In the task list block of the Dispatch Center task view, if a task number appears in italics, it indicates that a task is a parent task.

To navigate to the Parent/Child window, and then either cancel or reschedule all or parts of the child tasks and the original parent task, see Rescheduling Tasks Longer Than a Standard Shift Duration, page 5-44.

Viewing Service Request Details

When the task originates from a service request, the Oracle TeleService Service Request window can be accessed to view details from the Dispatch Center.

For more information on Service Requests, see the *Oracle TeleService User's Guide.*

Use this procedure to access the Service Request window.

1. Navigate to the Service Request window, page A-2 from the Field Service Dispatch Center window.

    > **Note:** When you navigate to the Service Request window from the Dispatch Center, the Tasks tab appears by default.

    The Service Request window displays information associated with the service request for which the task is assigned.

2. The user can make updates to the service request at this time, such as adding notes, and editing dates.

Viewing Service History

Service history is valuable when determining whether to increase or decrease a customer service agreement and to determine whether multiple calls are related. It can also be used to detect whether hardware or software failures are leading to multiple service requests.

Service history of technicians is also useful when assigning tasks to resources during interactive scheduling. For more information on viewing the work history of technicians using the Service History window, see Overview: Schedule Task Window, page 4-1 .

You can access the Service History window from

*   the navigator

*   the Dispatch Center's Navigate menu

*   the Service Request tab of the Dispatch Center Task View

*   the Advice tab of the Schedule Task window when scheduling tasks interactively from the Dispatch Center

The list of technician resources displayed in this window depends on how you accessed the window. For example, if you access the window from the Dispatch Center's Navigate menu, the window displays all the resources for the dispatcher. If your access was from the Schedule Task window, the window displays only those resources advised by the Scheduler.

Oracle Field Service provides a search mechanism to view service history by any of the fields in the customer or subject regions such as customer, site, product, problem, resolution, or technician. Furthermore, you can perform text searches based on key

words for both summaries and notes.

After you perform a search, the results display in the Results table. In this table, you can view request number, creation date, item, item description, customer name and number, item instance, problem and resolution codes, summary, request type, status, severity, urgency, contact name, and employee.

You can click the service request number for any of the service requests you want to view. The Service Request window appears.

Profile option CSF: Default Service History Display

From the Dispatch Center, you can query service history for a particular customer linked to an open task. The profile option CSF: Default Service History Display determines which query is executed.

For example, if you have the profile option set to Customer, all service requests associated with the particular customer appear. Other possible values include: Site, Item, or Instance.

Profile option CSF: Service History Time Frame Number and Profile Option CSF: Service History Time Frame UOM

Two other profile options, CSF: Service History Time Frame Number and CSF: Service History Time Frame UOM (unit of measure), determine the default amount of time for which you want to retrieve the service history.

For example, if you set 30 for the number, and Days for UOM, then your default service history search covers the past 30 days. UOM values include: days, weeks, months, and years.

Steps

Use this procedure to query and view service history:

1. Navigate to the Service History window, page A-2.

2. Enter the search criteria. If you select more than one search criterion, for example, customer name and item, both criteria must be met to return a value.

3. Click Search.

   The Results table populates with service requests that meet the search criteria.

4. To view a particular service request, click the Service Request number link.

5. To perform a search using different criteria, click Clear.

6. Enter the new criteria, and then click Search.

7. To change the time frame of the search, modify the Number and UOM fields.

Maintaining the Task Assignment Status for a Technician

Depending on how your Field Service environment is structured, you may want Field

Service technicians to be able to call or notify the dispatcher (to whom they report) to update the task assignment status for a task on their behalf. Dispatchers can maintain the task assignment status for a task from the Resources tab of the Field Service Dispatch Center.

Technicians can also update task assignment statuses using the same window from the Field Service Technician Dashboard when performing debrief. The same rules apply for technicians and for dispatchers. For more information on maintaining task assignment status during debrief, see Updating Task Assignment Status, page 8-16.

> **Note:** Dispatcher will not be able to update the task assignment status for a task that is part of a blocked trip.

Display of Assignment Status

The task Assignment Status field in the Resources tab of the Field Service Dispatch Center only becomes available to the dispatcher after the task has been initially committed (assigned) to the technician. The Assignment Status field will contain the statuses (list of values) that have transitions defined, from the current assignment status of the task, and have the Assignment check box selected. For more information on defining task and task assignment statuses, see the *Oracle Field Service Implementation Guide.*

Impact of the Update Schedulable Task Profile

The Assignment Status field behaves as follows:

- When the profile option CSFW: Update Schedulable Task is set to No:

    - Changing the Assignment Status from a non-schedulable status to a schedulable status *is not* allowed.

    - Selecting and saving with a status that has the Cancel check box selected, cancels the task assignment.

- When the profile option CSFW: Update Schedulable Task is set to Yes:

    - Changing the Assignment Status from a non-schedulable status to a schedulable status *is* allowed.

        If the assignment status is changed from a non-schedulable status to a schedulable status, the task will remain scheduled to the technician, but the task status may be updated.

    - Changing the task assignment from a schedulable status to a non-schedulable status where customer confirmation is set to Required, is not allowed.

    - Selecting and saving with a status that has the Cancel check box selected,

cancels the task assignment.

- Selecting and saving the status value present in profile option CSF: Default Unscheduled task status, *does not* un-schedule the task.

  Note: This profile has impact only on the Mobile Field Service wireless application.

If the profile option CSFW: Update Schedulable Task is set to Yes or No and you cancel a task assignment the following behavior occurs:

- If canceling an assignment leads to the cancellation of the task, where a customer confirmation has been received, dispatcher will be prompted to proceed or cancel the current action performed. They will receive a message: The task has Customer Confirmation set to Received. Do you want to continue with the cancellation of assignment?

- If canceling an assignment leads to the cancellation of dependency between or among tasks, dispatcher will be prompted to proceed or cancel the current action performed. They will receive a message: The task has dependency with other tasks. Do you want to continue with the cancellation of assignment?

- If canceling an assignment leads to the cancellation of task, where customer confirmation is received and task dependency exists, dispatcher will be prompted to proceed or cancel the current action performed. They will receive a message: The task has dependency with other tasks and Customer Confirmation is set to Received. Do you want to continue with the cancellation of assignment?

Updating Task Assignment Status

Whenever a task assignment status is manually updated, the task status will also be automatically updated with the same status value, if the task has a single resource assignment and there is a transition defined from the current task status to the selected status. Updating the task assignment status always triggers the task status update to keep both the statuses synchronized.

Updating the task assignment status functionality was designed around a task having only one resource assigned to it. Oracle Field Service recommends that you do *NOT* have multiple assignees for a task but to actually create multiple tasks instead. In the case where a task has multiple assignees, task assignment status updates are enabled with the following validation:

- If all the task assignment statuses have the same value after updating, the system will trigger the Task Status synchronization process.

- If all the task assignment statuses have different values after updating, you will be

able to save the records, but the system will not trigger the Task Status synchronization process.

Steps to Update Task Assignment Status from the Dispatch Center

Use the following steps to update the status for a technician.

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Query for tasks that have been assigned (committed) to a technician and then select the Resources tab.

   The Resources tab appears displaying the current assignee and the current task assignment status for the service request and task.

3. Select a different Assignment Status.

4. Save your work.

Cross-task Validation for Task Assignment Status Updates

You can set up cross-task validation rules for specified task assignment statuses. These rules control task assignment status updates based on existing assignment statuses of other tasks assigned to the same technician.

For example, if you set up cross-task validation rules for the Traveling task assignment status, tasks for a technician in a trip to different customer sites cannot be in the same Traveling status.

For more information, see Setting Up Task Status, Transition Rules, and Cross-Task Validation, *Oracle Field Service Implementation Guide*.

Unscheduling Tasks

If a task assignment has not been worked upon, completed, or closed, it can be unscheduled from the Schedule Management window. Unscheduling a task cancels the task assignments and changes the task status back to In Planning.

Use this procedure to unschedule tasks.

Prerequisites

The task must be scheduled to a technician.

The task must have a status other than Working, Completed, or Closed.

Steps

1. Navigate to the Schedule Management window, page A-2.

2. Select the check boxes located next to resource names for those technicians that you

want to unschedule tasks. You can select multiple check boxes to unschedule tasks for multiple technicians. If you want to unschedule tasks for all technicians, select the Select All check box.

3. In the Trips section, select the Start and End dates and times for the tasks you want to unschedule.

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

4. In the Actions section, select Unschedule in the Tasks field.

   > **Note:** You can block trips and unschedule tasks for the same specified period at the same time by selecting Block and Unschedule in the respective Actions fields.

5. Click OK.

   A popup window displays a message confirming that one or more tasks are to be unscheduled.

6. Click OK.

   A second message confirms the number of tasks you successfully unscheduled.

7. Click OK.

   The window closes. The tasks are unscheduled.

Tasks Rejected by Autonomous Scheduler

When the autonomous scheduler engine cannot schedule a task, the task status changes to the value set for the Auto Reject Status - Others parameter. If the Scheduler fails to identify any technician possessing spare parts (in cases where spare parts are mandatory), then the application assigns the task a status dictated by the Auto reject Status – Spares Unavailability parameter. The corresponding rejection status helps dispatchers find rejected tasks.

Dispatchers can view tasks that are rejected and their respective rejection reason in the Dispatch Center's Tasks List table. Dispatchers can also review the log and output file generated by the Search and Auto Schedule (Autonomous Scheduler) concurrent program to find problem description details for each rejected task. From the Dispatch Center, dispatchers can run a task query to identify all tasks with the Auto Reject status.

Prerequisites

Advanced Scheduler is installed.

1. Navigate to View Requests window, page A-2.

   The Find Requests window appears.

2. Find the relevant log entry for the Search and Schedule Task Automatically (Autonomous Scheduler) concurrent program to identify errors that require attention.

3. Navigate to the Field Service Dispatch Center, page A-2.

   The Field Service Dispatch Center window appears.

4. To find tasks rejected by the Autonomous Scheduler, in the Tasks section, select Auto Rejected from the View By list of values.

   The Task section populates with the list of rejected tasks.

5. Make the appropriate changes to the rejected tasks to fix the errors.

6. Change the task status back to 'In Planning.'

7. Run the Autonomous Scheduler concurrent program again to process the tasks accordingly.

   You can also schedule the rejected tasks interactively, if necessary.

Working with Resources

The Dispatch Center's Plan Board and Gantt views enable dispatchers to manage field service tasks from the perspective of resource availability and location.

Working with the Plan Board View

The Oracle Field Service Dispatch Center Plan Board contains a grid populated with service technician names as column headings and technician service trip information in the associated column cells. By default, information displays for the service technicians and the territories the user selected during the previous visit to the Dispatch Center.

If you configured the role and role type of Field Service Representative for internal technician resources while importing HR employee records or in the Resources window and set the CSF: Display only Technicians in Dispatch Center profile to the default Yes, the Plan Board displays only technician resources and excludes dispatchers and dispatch groups.

You can right click on a resource in the Plan Board and perform eligible actions such as creating personal tasks, and trips. For more information, see the Technician Right-Click Menu, page 5-32. A trip consists of departure tasks, arrival tasks, and scheduled, as

well as assigned service tasks.

Dispatchers use the Plan Board to monitor progress against the daily schedules of technicians. The primary methods for monitoring that are available to the dispatcher are the Field Service Plan Board cell color and letter codes.

To search for a particular task in the volume of tasks displayed in the Plan Board, enter the task number in the field at the end of the window and click on the Find Task icon to find this task and bring it into focus.

You can use the Tools menu option of Hide/Shift Tasks to hide the display of regular and/or standby shift tasks of resources such as departure and arrival tasks. In this case, the Plan Board displays only assigned tasks and personal tasks. This makes it easier for the dispatcher to focus on his requirements. Note that your configuration applies to the current session of the Dispatch Center. To change the default display of shift tasks in the Dispatch Center, set the CSF: Display Shift Tasks profile option to the required setting. For more information on this profile, see the *Oracle Field Service Implementation Guide*.

Cell Color Codes

Task type, task status, task priority, whether the task has been escalated, and the resource's shift type drive color coding. For example, The Plan Board displays a service technicians' shift using different background color scheme for differentiating regular and stand by shifts Color code setup is performed during implementation. For more information on color setup, see the *Oracle Field Service Implementation Guide*.

Letter Codes

Within each Plan Board cell, Field Service letter codes identify whether a task has specific attributes. When these letters appear in a Plan Board cell, then the corresponding task attribute is in effect. Letter codes are positioned from left to right within a cell by priority. This list explains letter codes and cell positions:

1. In first position: **A** (Access Hours) or **F** (After Hours)

2. In second position: **C** (Customer Confirmation Required), or **V** (Customer Confirmation Received)

3. In third position: **S** (Spares)

4. In fourth position: **M** (Parent), **D** (Child)

5. In fifth position: **R** (Task Dependency)

6. In sixth position: **N** (Notes)

Use the following procedures to work with the Plan Board.

Prerequisites

Populate the Plan Board view.

The Plan Board view appears displaying information for the same technicians previously accessed by this user by default. You can use the Select Territories and Task Owners window, page A-2 to populate the Plan Board, Gantt, and Map views with territories of service technicians other than the ones currently displayed. See Associating Territories to a Dispatcher, *Oracle Field Service Implementation Guide*.

Monitoring Technician Trips

Dispatchers monitor trips of service technicians from the Dispatch Center Plan Board view.

1. Navigate to the Field Service Dispatch Center Plan Board view, page A-2.

   The Plan Board view appears.

2. The plan for the current date appears by default. You can also use the forward and backward buttons located on either side of the Date field to change the date displayed. To select a different date from the calendar, click the Date field.

   The Calendar window appears.

3. Select a date from the Calendar, and then click OK.

   The Calendar window closes.

4. To focus on a specific service technician, click Goto.

   The Resources window appears.

5. Use the Find field to locate a resource name from the list of values. Alternatively, use the scroll bar to find the service technician that you want to select. Click OK.

   The selected service technicians name is highlighted on the Plan Board view.

6. To view other service technicians, select Select Territories and Task Owners from the Navigate menu on the tool bar. See Associating Territories to a Dispatcher, *Oracle Field Service Implementation Guide*.

   > **Note:** For more information on managing technician trips refer to Overview of Managing Field Service Technician Trips, page 6-1.

Tasks Right-Click Menu

Right-click the *task name* on the Plan Board or Gantt Chart to display the list of options available. Selecting an option opens a related popup window.

- For tasks that can be scheduled, select Auto Schedule to automatically schedule

tasks to resources using the criteria set up in Advanced Scheduler, if installed.

- Select Commit Task to commit a task to a technician. See Releasing Work to the Field - Interactive Process, page 5-40.

- Select Unschedule Task to unschedule a task. See Unscheduling Tasks, page 5-23.

- Select Cancel selected Task to cancel a task. See Canceling a Scheduled Task, page 5-48.

- Select Cancel starting at selected task if the task is part of a parent and child task relationship and you want to cancel all tasks beginning with a selected task. See Canceling a Scheduled Task, page 5-48.

- Select Schedule to schedule a task. The Schedule Task window appears. See Overview: Schedule Tasks Window, page 4-1 and the *Oracle Advanced Scheduler User Guide.*

- Select Customer Confirmation to add the customer confirmation requirement or to indicate confirmation from the customer. The Customer Confirmation window appears. See Marking Tasks for Customer Confirmation, page 2-5.

- Select Reschedule selected Task to reschedule a task. The Reschedule Task window appears. See Rescheduling a Scheduled Task from the Plan Board, page 5-42.

- Select Reschedule starting at selected Task if the task is part of a parent and child task relationship and you want to reschedule all tasks beginning with a selected task. The Task Parent/Child window appears. See Rescheduling Tasks Longer Than a Standard Shift Duration, page 5-44.

- Select Debrief to report on or view a report of a performed task. See Debriefing Work Completion, page 9-1.

- Select Parts Requirement to view the required parts for the selected task.

  The Parts Requirement window appears for the selected task. See Viewing and Creating Parts Requirements, page 8-29.

- Select Access Hours to create access hours and after hours constraints for a particular task. The Access Hours page appears. See Defining Customer Access and After Hours Constraints, page 2-7.

- Select Task Dependencies to view or create task dependencies. The Task Dependencies window appears. See Creating Task Dependencies, page 2-10.

- Select Parent/Child to view the parent and child task relationships or to either cancel or reschedule all or parts of the child tasks and the original parent task. See Rescheduling Tasks Longer Than a Standard Shift Duration, page 5-44.

- Select Change Invalid Address to change or correct the invalid address for a task. See Correcting and Validating Addresses, page 5-37 and Geotesting and Reverse Geocoding, page 5-38.

- Select Send Message to send a message to another user.

- Select Source Document to have the window for the originating document associated with the task appear. See Viewing Service Request Details, page 5-18.

- Select Task Related Information to view the details for the task. The Task Related Information window appears.

- Select View Task on Maps to view the task with its incident address plotted on the Google or eLocation Map. You can view the location details of the task on the map and use, if required, the Plot Eligible Technicians button on the map to view the locations of technicians qualified for the task.

- Select View Task and Technicians location on Map to view the task with its incident address plotted on the Google or eLocation Map and the locations of all technicians in the territories managed by the dispatcher. See Viewing Selected Tasks and All Technician Locations, page 7-3.

- Select Charges and Service Logistics to create, update, or view charges on a service request. See, Creating and Submitting Charges, page 2-8.

    Note: Third party administrators have the same task right-click menu options except for

    - Reschedule Starting at selected Task

    - Cancel Starting at selected Task

    - Rescheduling

    - Parent/Child

    In addition, third party administrators cannot view service request details, or view or perform any activity related to maps or trips. For more information on functions of a third party administrator, see Managing Third Party Tasks in the *Oracle Advanced Scheduler User Guide* .

Right-Click Menu Options for Departure Tasks

Right-click the Departure Task on the Plan Board to display the list of options available. Selecting an option opens a related popup window.

- Select Optimize to call Advanced Scheduler to evaluate all possible sequences of a

trip. If Scheduler finds a new sequence for the existing tasks with a cheaper cost factor, it optimizes the trip. This affects the task sequence. This function is available only when Advanced Scheduler is installed.

- Select Recalculate to rearrange the tasks of a trip without altering the sequence of tasks in the trip. This function is used whenever a new task is included in the trip, or an existing task is eliminated from the trip.

- Select Block to cause the trip to not be available when scheduling tasks. Alternatively, if the trip is blocked, you can select Unblock to remove the block.

- Select Update Trip to update a technician's trip. See Updating Trips within the Dispatch Center, page 6-3.

- Select Delete Trip to delete a trip. See Deleting a Trip within the Dispatch Center, page 6-5.

- Select Commit to commit the tasks in a trip.

- Select View Task on Map to view a map of the task location.

Right-Click Menu Options for Arrival Tasks

Right-click the *Arrival Task* on the Plan Board to display the list of options available. Selecting an option opens a related popup window.

- Select Update Trip to update a technician's trip. See Updating Trips within the Dispatch Center, page 6-3.

- Delete Trip to delete a trip. See Deleting a Trip within the Dispatch Center, page 6-5.

- Select View Task on Map to view a map of the task location.

Working with the Gantt View

Dispatchers use the Gantt chart to view the schedules of several technicians across multiple days, and to schedule or reschedule tasks. For more information, see Rescheduling a Scheduled Task from the Gantt View, page 5-42.

The Gantt chart view is a graphical overview of the scheduled tasks mapped to a time line. To search for a particular task in the volume of tasks displayed in the Gantt chart, enter the task number in the field at the end of the window and click on the Find Task icon to find this task and bring it into focus.

On the left is an alphabetical list of the resources in the territories of the dispatcher. The Goto… button helps you find and display a specified resource.

> **Note:** If you configured the role and role type of Field Service
> Representative for technicians while importing HR employee records
> or in the Resources window and set the CSF: Display only Technicians
> in Dispatch Center profile to the default Yes, the Resource section only
> displays technicians and not dispatchers or dispatch groups.

When you move to the Gantt or Scheduling Chart view, the actual date displayed by default at the bottom is the current system date. You can enter a different actual date and click Refresh to update the view. The date range shown by default starts with the current system date and spans the number of days configured in the CSF: Data window in days for Gantt profile. You can use the buttons at the bottom of the window to adjust the date range and move the view forward or backward in blocks of a day, week, or month from the actual date.

The Gantt chart uses the same color coding scheme that is available in the Plan Board view. The Gantt chart displays a service technician's shift using different background color scheme for differentiating regular and stand by (After Hours) shifts, assigned tasks, and the travel time between tasks. The right-click menus in the Gantt Chart are identical to those that the user can access through the Plan Board. To configure the default display of shift tasks, set the CSF: Display Shift Tasks profile option to the required setting. You can also configure the current session of the Dispatch Center Gantt chart view using the Tools menu option of hiding shift tasks.

When you move from the Gantt chart to the Plan Board view, the Planboard refreshes data as per the start date of the last selected task in the Gantt View. To maintain the date context, set the CSF: Pass Scheduling Chart context date to Plan Board profile to the default value of Yes.

> **Note:** For territory or district managers who may want to see the
> schedules and availability of technicians in their territories across the
> date range or period set by the CSF: Data Window in Days for Gantt
> profile, they can access the Read Only Scheduling Chart from the
> Navigator. This Scheduling Chart view is not interactive. Territory
> managers can only use the scroll buttons at the bottom to move the
> schedules forward or backward a day or a week at a time in context
> with the original period. For more information on the profile, see the
> *Oracle Field Service Implementation Guide*.

The Gantt chart features icons and task attributes for accessing additional task details, such as the task number, priority, customer name, and whether the task is in a parent and child relationship. Icons and attributes are ranked in importance during set up, and then appear on the task bar accordingly. For information about setting up Gantt chart icons (Field Service Setup > Scheduling Chart Setup), see the *Oracle Field Service Implementation Guide*.

Other key features of the Gantt chart are the ability to drag-and-drop to reschedule tasks to the same or a different technician and the ability to elongate/contract the effort

of the scheduled tasks. While performing these actions appropriate validations are done and the user is informed if any violation occurs. The user can either accept the violation or cancel their current action

Use this procedure to explore the Gantt view tools and options available for task management.

Specify Viewed Information

1. Navigate to the Field Service Dispatch Center Gantt view, page A-2.

    The Gantt view appears displaying information about service technicians, their shifts, and assigned tasks.

2. Specify From and To dates to define the date range that you want to view, if different from the default display.

    The Gantt view displays information for the specified date range.

3. Right-click the date or time on the Gantt chart column header to change the scale of the Gantt chart. You can select from one of these options: 15 Minutes, 30 Minutes, Hours, Three Hours, Six Hours or Days.

4. To focus on a specific service technicians schedule, click Goto

    The service technicians name is highlighted and visible.

View Task Details

1. To view a task description using the "tool tip" feature, pause the mouse over a task.

2. To view task-related details, position the mouse over the task bar that you want to view, right-click, and then select Task Related Information from the right-click menu to view task details.

    The Task Related Information window appears displaying information relating to the specific task, including product, task customer, and required skills. It also contains both planned and actual start and end dates and times. If a project is associated with the service request task, then you can also view the project related information, including expenditure organization, project number, project name, project task number, and project task name.

Technician Right-Click Menu

1. Right-click the *Service Technicians Name* on the Plan Board to display the list of options available. Selecting an option from the right-click menu opens a related popup window.

    *   Select Create Personal Task to create personal tasks for this resource. See Steps to Create a Personal Task from the Dispatch Center, page 6-11.

- Select Create Trip to manually create a trip if you have defined the shift pattern for this resource. See Creating Trips from Existing Shift Patterns within the Dispatch Center, page 6-2.

- Select Receive Parts to receive expected shipments of spare parts on the behalf of technicians out in the field. See Receiving Parts from the Dispatch Center, page 2-17.

- Select Commit Schedule to commit the resources schedule. See Releasing Work to the Field - Interactive Process, page 5-40

- Select Schedule Management to view the resources current schedule. From the Schedule Management popup window, you can Unschedule tasks, Optimize, and Block or Unblock trips for specified days. See Manage Field Service Technician Availability, page 6-5.

- Select Resource Information to view the resources details such as name, phone number, and e-mail address. See Viewing Resource Details, page 5-33.

- Select Resource Addresses and Sub-inventories to view the resources addresses and sub-inventories. You can add an address for the resource at this time. See Maintaining Technician Addresses and Subinventories, *Oracle Field Service Implementation Guide*.

- Select Resource Skills Management to view technician skills and skill levels. The Resources tab of the Skill Management window appears for the selected resource. You can also navigate to the Skills and Skill Levels tabs for related information. See Assigning Skills and Skill Levels to Technicians, *Oracle Field Service Implementation Guide*.

- Select Calendar menu option to view the technicians calendar for the upcoming month. See Viewing Technicians' HTML Calendars, page 5-34.

- Select View Technician Location on Map to view all tasks scheduled to the resource on Google or eLocation Map, including the technicians start and end location. See Viewing Technician Location and Trip, page 7-2.

Viewing Resource Details

Use the Resource Information window to view the details of the resource assigned to the task. Details include, name, telephone number, and e-mail information.

Steps

1. Navigate to the Resource Information window, page A-2.

   The Resource Information window appears.

2. View name, telephone, and e-mail information. Click Close.

Viewing Technicians HTML Calendars

A dispatcher has the ability to access the calendar of each technician in an HTML format that can viewed in a daily, weekly, or monthly format. This calendar also contains trip information that can be accessed, including arrival, departure, and task details. The calendar can be refreshed to update the current information and it can be printed as well.

Use this procedure to access a technicians calendar.

A dispatcher can launch multiple calendars at the same time.

> **Note:** After a calendar is launched in HTML format, it remains open until it is manually closed. If the Dispatch Center is closed, it does not effect the calendar.

Steps

1. Navigate to the technicians Calendar page, page A-2.

   The technicians calendar launches in HTML format in the monthly view.

2. To view a single day of the technicians calendar, click the Daily date link.

   You can change the daily view by changing the parameters in the View fields.

3. To view task, arrival, or departure details for a particular trip, click the appropriate link.

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

5. To close the calendar, click the Close Window link.

Working with the Map View

The Dispatch Center provides a geographical representation of service areas for service technicians. You can use the Map for monitoring purposes. The Map provides a geographical view of a service technician's location when a task is in a status of *working.* The date shown for the Map is the actual date.

The Dispatch Center Map facility enables dispatchers to view a range of views that vary in detail. At the highest level, the Map displays countries and states outlined, major roads and waterways, and label names of state capitols and major cities. At the most detailed level, the Map displays roads with names, including on and off ramps, city boundaries, regional features, and major landmarks. You can zoom in and zoom out

using the buttons located on the right side of the map display area.

Prerequisites

Spatial multiple datasets must be loaded and the CSF: Enable Multi Dataset profile set to Yes at the site level

Data pertaining to the road network must be loaded into the spatial scheme.

Steps

1. Navigate to the Field Service Dispatch Center Map view, page A-2.

   The service technicians you are managing display on a service area Map of the country.

2. Profile Option - CSF: eLocation Map Last Used Spatial Dataset

   The Map opens to the default view based on the value of this profile option. The first time that you access the map, it is blank, since there is no value set for the user in this profile option. When you select a dataset and dataset country and save this Map view, the view updates the profile and becomes the default view for the next time you access the Map view. For example, if you manage technicians in France, you must select the EU dataset for Europe.

3. Profile Option - CSF: eLocation Map last used service area number

   The Map opens to the default view based on the value of this profile option. When you save a Map view, that view updates the profile option, and becomes the default view for the next time you access the Map view. The first time you access the Map, it is blank, since there is no value set for the user in this profile option.

4. To view a Map, select a dataset, dataset country, and service map from a list of values in the Service Area region of the window.

   The selected tasks, along with their locations, are shown on the Map.

5. (Optional) To control the detail of the area of the Map display use the In and Out buttons in the Zoom section. Alternatively, use the mouse to draw a box on the Map.

   The Map level of detail changes as specified.

6. (Optional) To adjust the area displayed within the Map, use the left, right. up, and down arrows.

7. To show the Map in its entirety when a fragment of the selected service area is shown, click Reset.

8. To change the Map, select a new option from the list of values in the Service Area

region.

9. To save your current Map settings, click Save.

   Saved settings determine the default opening display the next time you use the Map.

Overview: Invalid Addresses

When the customer address in the system is invalid, Oracle Advanced Scheduler can not associate a technician with the task if the user decides to schedule invalid address tasks.

To address this issue, Field Service provides a background process (concurrent program) that identifies invalid addresses in the system for a date range, and then enables a dispatcher to correct the found invalid addresses. This option is only available if you have geo-spatial data loaded for your application.

If you set the CSF: Enable Multi Dataset profile to Yes at the site level, based on the country of the current task, then the appropriate spatial data is loaded into the instance. For example, if the current task's country is United States, the NA dataset chosen and all list values are set for this dataset.

Field Service then considers the following criteria to determine whether an address is invalid:

- Address

- City

- State

- Zip code

- Country

Identifying and changing invalid addresses is a three-step process:

- Submitting the Invalid Addresses Concurrent Program, page 5-37

- Identify invalid addresses in the Change Invalid Address window

- Correcting and Validating Addresses, page 5-37

If you do not have spatial data loaded, you can use Field Service's eLocation Map to verify addresses on the Geotester page. For more information, see Geotesting and Reverse Geocoding, page 5-38.

Correcting and Validating Addresses

To change or correct the invalid addresses, follow this procedure.

Prerequisites

You must run the Find Invalid Addresses concurrent program. See Submitting the Find Invalid Addresses Concurrent Program, page 5-37.

Steps

1. Navigate to the Change Invalid Address window, page A-2.

    The Change Invalid Address window appears.

    - If invoked from the Dispatch Center, the table displays the invalid address of the task currently in focus. If the Address is valid, then this option is disabled.

    - If invoked from the Navigator, the table contains all tasks with addresses marked as invalid by the Find Invalid Addresses concurrent program.

2. Select the task for which you want to change the address.

    In the Address tab, the current invalid address is displayed.

3. Click the Logged Errors tab.

    A detailed error message regarding the invalid address appears.

4. In the Addresses tab, make the appropriate corrections to the addresses.

5. After you have made changes, click Validate Address or save the entered data, to ensure that the new values you entered can be geo-coded.

    After you have changed and validated the address, the task is removed from the table that displays invalid addresses.

Submitting the Find Invalid Addresses Concurrent Program

All Field Service tasks that are yet to be scheduled are candidates for the Find Invalid Addresses program.

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

Prerequisites

Task Status: Schedulable

Task Planned Start Date is within the date range specified.

Steps

1. Navigate to the Find Invalid Addresses window, page A-2.

The Parameters window appears in the foreground of the Find Invalid Address window.

2. (Optional) Enter the start and end date range for the address records that you want the system to check. If no date range is specified, there is no validation based on start date.

3. Click OK.

   The Parameters window closes. The date range, if entered will appear in the Parameters field.

4. In the 'At these times' region, you can schedule the program to run automatically, or on demand.

5. Click Submit.

   For each candidate task selected, the Location Finder attempts to resolve addresses having no associated geo codes (latitude and longitude).

   • If resolved successfully, the HZ_LOCATIONS table updates with geo codes for the task incident or resource address.

   • If the Location Finder fails to resolve the address, then the erroneous geo code entries in the HZ_LOCATIONS table are cleared.

6. The Decision popup window appears to display the concurrent request number, and asks whether you want to submit another request.

7. Note the request number, and then click No.

8. Check the status of the concurrent program by navigating to View > Requests in the tool bar.

9. When the request is completed, click View Output to see the report of invalid addresses.

   The concurrent program generates the output file with the list of tasks having invalid addresses, the error messages, and a detailed error log.

Geotesting and Reverse Geocoding

Before scheduling or plotting tasks and technician trips on a map, dispatchers can verify customer addresses using the Geotester. In addition, if only geographic coordinates of a task address are known, dispatchers can use Reverse Geocoding to find the actual street-level address.

Geotesting Steps

Use these steps to verify a pair of addresses.

1. Use the Field Service Manager responsibility to navigate to the Geotester page.

2. If you have uploaded spatial data, you can select the data set, country, state, city, postal code, and address for the From address and the To address in the Geotester tab.

   If there is no spatial data installed, you must enter the From and To address fields.

3. Use the Verify From Address and the Verify To Address buttons. If the addresses are correct, the geographic coordinates for the addresses are populated.

4. Close the Geotester page.

You can use the eLocation Route Calculator to calculate and display the route and driving directions between this pair of addresses on the eLocation Map. For more information on route calculations, see Setting Up Advanced Scheduler and Time and Distance Calculations in the *Field Service Implementation Guide*.

Reverse Geocoding Steps

Use these steps to find a valid address using reverse geocoding.

1. Use the Field Service Manager responsibility to navigate to the Geotester page.

2. Go to the Reverse Geo Coder tab of this page.

3. If you have uploaded spatial data, select the appropriate data set for the coordinates that you entered.

   If there is no spatial data installed, but you have registered with Google Map, select Google Maps as the data set. If you neither have spatial data nor Google Map registration, select eLocation as the data set.

4. Click Submit to populate the nearest valid address and display it on the eLocation map.

   The distance populated is the distance from the given coordinates at which a valid customer address could be found.

5. Close the Geotester page.

Committing Schedules

When you commit the schedule it is communicated to the service technicians. You can also assign a task to a technician by selecting the task in the tasks list table of the Dispatch Center and using the task right-click menu option of Commit. For more information, see Working with the Planboard View, page 5-25.

Releasing Work to the Field - Interactive Process

Use this procedure to interactively commit a schedule and release the corresponding task assignments to the technician.

Steps

1. Navigate to the Commit Schedule window, page A-2.

   The Commit Schedule window appears displaying the default dates.

2. In the Time Frame section, indicate the date range of the schedule to be committed. The date can indicate schedules created in the past hour, but also can cover one or more days.

   When the commit schedule function has been accessed by right-clicking a resource name in the Plan Board or Gantt view, the 'From' date field contains the active date of the Plan Board or Gantt. The default 'To' date is the 'From' date plus one entire day.

3. In the Resource section, the Resource Type and the Resource Name fields display the technician for whom you want to commit the schedule.

   When starting the function by right-clicking a Resource Name in the Plan Board, the Resource Name is filled in automatically.

4. Click OK.

   The schedule is committed. Once this procedure is completed, the task status is updated to 'Assigned'.

Releasing Work to the Field - Concurrent Program

For automatic schedule commitment, you can run a concurrent program called Auto Commit Tasks in the background. The Auto Commit Tasks program is set up at implementation or can be launched at any time. When you run this concurrent program, you can optionally enter the task query that you want the program to use in the Parameters popup window. For example, to auto commit all tasks in the Inbox, select the *Inbox* query from the list of values in the Task List Query parameters field.

Steps

1. Navigate to the Auto Commit Schedule window, page A-2.

   The Parameters window appears in the foreground of the Auto-Commit Schedule window.

2. In the Parameters window, select a Task List Query or Territories from the list of values. Click OK.

The Parameters window closes. The selected query appears in the Parameters field of the Auto-Commit Schedule window. If you select Territories, two more fields are displayed: Commit Horizon and UOM.

3. Click Submit.

Rescheduling Tasks

You may need to reschedule a scheduled task for a variety of reasons. For example, the technician to whom a task is assigned may fall ill or have to go on leave to attend to an emergency personal matter. Alternatively, the circumstances of a scheduled task may change, necessitating updates and subsequent rescheduling for these updates to take effect. For example, the customer may request a preferred resource on a field service task but due to non-availability of this resource and the contract or service agreement demanding an immediate turn around on the task, the task may have been scheduled to another available resource. However, after this other resource starts work on the task, the customer's preferred resource may become available. In such a case, the dispatcher may want to reschedule the task to the preferred resource without any further delay.

Sometimes, after a task has been scheduled and the technician has started work on it, the dispatcher may update one or more of the following task attributes. The reasons for change may be varied. Below are some examples of when such updates may be necessary.

- **Customer access hours** may change if a new access hours schedule is received from the customer

- **Planned effort** which may have been based on the non-availability of skilled resources or parts may change once these resources or parts are available

- **Task priority** which is based on the contract or service agreement may change if updates are made to the contract or agreement

- **Task status** may change if parts ordered for the task do not arrive on time or if the assigned resource suddenly has an emergency personal task that he must attend

- **Planned start and end dates** may change if there are updates to the contract or service agreement that adversely affects the response time

- **Scheduled start and end dates** may change based on availability of resources, parts, or task dependencies of the scheduled resource.

Use one of these procedures to move an already assigned task from one service technicians schedule to another.

- Rescheduling a Scheduled Task from the Plan Board, page 5-42

Rescheduling a Scheduled Task from the Plan Board

Use this procedure to reschedule a task from the Plan Board.

Steps

1. Navigate to the Field Service Dispatch Center, page A-2.

   The Dispatch Center Task view appears (by default).

2. From the Task view, click the Plan Board icon to switch to the Plan Board view.

   The Plan Board view appears.

3. Right-click the task you want to reschedule, and then select Reschedule selected Task from the right-click menu.

   The Reschedule Task window appears. You can reschedule the task using all the available options and normal scheduling filters.

Rescheduling a Scheduled Task from the Gantt View

Dispatchers can reschedule tasks from the Gantt chart either by using the drag-and-drop functionality or the task right click menu for the tasks that they want to reschedule.

You can reschedule a task from one service technician to another by dragging and dropping the task or you can make adjustments to existing tasks for a technician by dragging to increase or decrease the length of the task bars. For information about scheduling a task, see Working with the Gantt View, page 5-30.

You can also drag and drop tasks not associated with a service request such as personal tasks across the same or different trips of the technician. When you move a personal task, the task status and task assignment status remain the same.

Drag-and-Drop Steps

This procedure documents how to use drag-and-drop functionality to reschedule a task from the Gantt view.

1. Navigate to the Field Service Dispatch Center, page A-2.

The Dispatch Center Task view appears (by default).

2. From the Task view, click the Gantt icon to switch to the Gantt view.

3. Select the task to be moved by placing the cursor on the cell. You can move a planned, scheduled, or assigned task. Click and hold down the left mouse button while you drag the task to its new position in the Gantt view. The reschedule can call for a different time and effort or a different technician.

> **Note:** For a planned task with task dependencies you can choose to recalculate the trip after moving the task or decreasing or increasing the task effort. To ensure trip optimization on scheduled and assigned tasks that you moved, the system flips the status of a task rescheduled to a different technician's trip back to the status governed by the CSF: Default Planned Task Status for Planned Task profile.

4. Release the left mouse button.

   The task is rescheduled to the technician and the time slot is indicated on the Gantt.

5. Alternatively, you can reschedule the task of a technician by adjusting the time and effort on it. To do this, select the task bar for the task, hold down the left mouse button, scroll to the end of the task bar, and drag in or out to adjust the length of the task bar.

6. Release the left mouse button.

   The task is rescheduled to the technician with the required change in time and effort.

7. Save your work.

Right-Click Steps

This procedure documents how to use the right-click menu to reschedule a task from the Gantt view.

1. From the Task view, click the Gantt icon to switch to the Gantt view.

2. Select and right-click a task, and then select Reschedule selected Task from the right-click menu.

   The Reschedule Task window appears. You can reschedule the task using all the available options and normal scheduling filters.

Rescheduling a Scheduled Task from the Tasks View

Use this procedure to reschedule scheduled tasks from the Task list region of the Dispatch Center:

To reschedule a task from this view, you must either be sure of the resource that you want to reassign this task to or depend on the Scheduler for advice.

1. Navigate to the Field Service Dispatch Center, page A-2.

   The Dispatch Center Task view appears (by default).

2. Query for tasks that are scheduled.

3. In the Task list table, right-click the task you want to reschedule, and then select Reschedule selected Task from the right-click menu.

   The Reschedule Task window appears. You can reschedule the task using all the available options and normal scheduling filters.

Rescheduling Tasks Longer Than a Standard Shift Duration

When the effort for a task takes longer than a standard work shift, for scheduling purposes, Advanced Scheduler automatically splits this (parent) task and creates multiple child tasks with durations that are equal to, or shorter than a standard shift.

During initial scheduling of a task with a duration that is longer than a standard shift, Advanced Scheduler looks for a single technician who has availability in contiguous time slots. A parent task is created with planned effort that exceeds the standard work shift. After that task is scheduled, either through autonomous scheduling functionality or interactively, the parent task is split and related child tasks are created that fit into the standard shift, each with a unique task number. Each child task is then assigned a Planned Effort time, in hours, that adds up to the total task time of the parent task.

For example, if the planned effort for a task is 20 hours, and a standard work shift is eight hours, the parent task propagates three related child tasks; two with eight hour durations, and one a four hour duration.

This table describes whether attributes or functions are associated with the parent task or the child tasks. For example, the Assignee attribute is associated only with the Child tasks, and not the Parent task. Skills assigned to the Parent task are copied to the Child tasks, thus all child tasks require the same set of skills as the Parent task. The Parent task cannot be debriefed. Only Child tasks are debriefed.

Attributes of tasks longer than a shift:

Attribute or Function	Parent Task	Child Task
Assignee	No	Yes
Skills	Yes	Yes, copied from Parent
Parts	Yes	No
Owner	Yes	Yes, default value is from Parent
Debrief	No	Yes
Dispatch Center Task List	Appears in italic font	Appears in standard font
Dispatch Center Plan Board	No	Yes
Dispatch Center Plan Board Split Flag	No	"D" appears in the Plan Board cell, 4th position.
Dispatch Center Gantt view	No	Yes
Schedule Task Advice Tab	Yes	Yes, for reschedule only
Planned Dates	Yes, as created	Always set equal to Scheduled dates
Scheduled Dates	Always synchronized to Child dates: • Start = Earliest Child Start • End = Latest Child End	Yes, as scheduled

The Parent task displays in italic font in the task list, and the Parent check box is selected. Child tasks displays in standard font in the task list, and the Child check box is selected.

All technician recorded work, such as actual work time, and debrief, is executed against

the child tasks. The relationships between the parent and child tasks are created and maintained automatically by the Field Service functionality.

When using assisted scheduling in the Dispatch Center, only the first possible position in the schedule displays. When using the Intelligent scheduling mode, multiple possible scheduling scenarios display, ranked by cost.

In the event that the parent task or one or more of the child tasks needs to be rescheduled or canceled, you can do this either by right clicking on tasks in the Dispatch Center and then selecting Reschedule starting at selected Task or Cancel starting at selected Task, or through the Parent/Child window, which is accessible from the Dispatch Center.

Use the following procedure to navigate to the Parent/Child window, and then either cancel or reschedule all or parts of the child tasks and the original parent task.

Prerequisites

The task must have a Planned Effort greater than or equal to the default shift duration.

Task must be scheduled.

Steps

1. To reschedule, navigate to the Task Parent/Child window, page A-2 by either selecting the parent or one of the child tasks.

   The task details for the selected task display in the top region of the window. Below that parent task information displays in the Parent region and information relating to the child tasks appear in the Child region.

2. To make changes to the Parent task, click the Parent Number field of the Parent section.

   This enables the following buttons: Cancel Parent Task, Unschedule Parent Task, and Reschedule Parent Task.

3. If you click Cancel Parent Task, all related Child tasks are canceled as well. If you click Unschedule Parent Task, all the child tasks are unplanned. If you click Reschedule Parent Task, all the child tasks are rescheduled to correspond to the new parent task schedule.

4. You can also perform similar functions against any one or all of the child tasks. To enable the child task buttons, click any of the child tasks in the Child section.

   The available buttons for child tasks are: Cancel Selected Task, Cancel Starting Selected Task, Reschedule Selected Task, Reschedule Starting Selected Task.

5. To cancel a single task, select the task you want to cancel and click Cancel Selected Task.

   The child task is removed.

6. You can also cancel all tasks that follow a selected task in the hierarchy. To cancel a set of tasks, select the task that you want to begin the cancellation process with and click Cancel Starting Selected Task.

   This function is not available for the first or last task in the set. Canceling the initial task and all that follows requires that you perform this function at the Parent level. This button also is not available for the last task in the sequence because no tasks follow it.

7. To reschedule a selected task, select the child task you want to reschedule and click Reschedule Selected Task.

   This function enables you to shift the task to another technician, for example, in the case of illness or some other unexpected development.

8. To reschedule a child task and all the subsequent child tasks, select the task you want to begin rescheduling and click Reschedule Starting Selected Task.

   This functionality addresses a situation where a technician is not available for future work, but the parent task is not completed.

Unscheduling a Scheduled Task

After a task is scheduled, you can choose to unschedule it. Then at a later date you can schedule it again.

For more information on unscheduling a task from a trip, see Unscheduling Tasks, page 5-23.

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

Steps

1. Navigate to the Field Service Dispatch Center, page A-2.

   The Dispatch Center Task view appears (by default).

2. From the Task view, click the Gantt icon to switch to the Gantt view, or click the Plan Board icon to switch to the Plan Board view.

   The Plan Board or Gantt view appears.

3. Select and right-click the task number for the task that you want to unschedule.

4. Select Unschedule Task from the right-click menu.

5. Click Continue.

   The task is unscheduled.

6. Click Refresh.

The task status changes to the value in the profile option CSF: Default Unscheduled Task Status.

Canceling a Scheduled Task

To cancel a scheduled task you need to cancel all task assignments for the task. After a task is canceled, you can choose to schedule it again, or close it. If a task is part of a parent and child task relationship, you can also choose to cancel all tasks beginning with a selected task.

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

Steps

1. Navigate to the Field Service Dispatch Center, page A-2.

   The Dispatch Center Task view appears (by default).

2. From the Task view, click the Gantt icon to switch to the Gantt view, or click the Plan Board icon to switch to the Plan Board view.

   The Plan Board or Gantt view appears.

3. Select and right-click the task number for the task that you want to cancel.

4. Select Cancel selected Task from the right-click menu.

   Alternatively, select Cancel starting at selected Task. If a task is part of a parent and child relationship, this option cancels all tasks beginning with the task selected.

   Warning messages, if any, appear in a popup window. For example, a warning message appears if the task you want to cancel is part of a parent and child relationship, and the scheduled start time has passed.

5. Click Continue.

   The task is canceled.

6. Click Refresh. The task status changes accordingly.

Rescheduling, Unscheduling, or Canceling a Task With Debriefed Timings

Using Oracle Field Service you have the ability to reschedule, unschedule, or cancel a task when the task has debriefed timings reported against it. Debriefed timings are associated with a task when technicians report time, labor, material, and expense transactions against a task during debrief. When the dispatcher goes to reschedule, unschedule, or cancel a task with debriefed timings, the system will display to them a warning message that the task contains debriefed timings. At that time they can proceed with the action or not perform the action. If they perform the specific action, the actual transactions stay with the task that has been rescheduled, unscheduled, or

canceled.

In addition, you cannot unschedule, reschedule, or cancel a task if one of these conditions exist:

- The task has multiple resource assignments.

- The task has received the Customer Confirmation.

    You will need to change the confirmation status to Not Required or Required before you can unschedule, reschedule, or cancel the task.

For more information on rescheduling a task, see Overview: Rescheduling Tasks, page 5-41.

For more information on unscheduling a task, see Unscheduling a Scheduled Task, page 5-47 and Unscheduling Tasks from a Blocked Trip, page 5-23.

For more information on canceling a task, see Canceling a Scheduled Task, page 5-48.

These tables illustrate the rescheduling, unscheduling, and canceling task functionality associated with the different task status flags:

Rescheduling a Task

Task Status Flag	Debriefed Timings Present	Reschedule Selected Task	Reschedule Starting at Selected Task	Window Changes	Functional Impact
Schedulable	No	Yes	Yes	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Reschedule Selected Task • Reschedule Starting at Selected Task (if child task) The Reschedule buttons in the Task Parent/Child window behave the same as the reschedule options from the right click menu in the Field Service Dispatch Center.	Update new schedule times and assignment if applicable. Old assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Planned Task Status. Task will display in the Plan Board and Gantt Chart with new scheduled times.

Task Status Flag	Debriefed Timings Present	Reschedule Selected Task	Reschedule Starting at Selected Task	Window Changes	Functional Impact
Schedulable	Yes	Yes	Yes	Right click Menu (Task List, Plan Board, Gantt Chart): • Reschedule Selected Task • Reschedule Starting at Selected Task (if child task) The Reschedule buttons in the Task Parent/Child window behave the same as the reschedule options from the right click menu in the Field Service Dispatch Center.	User receives the warning message: Task <task number> has Actual Timings. Update new schedule times and assignment if applicable. Old assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Planned Task Status. Task will display in the Plan Board and Gantt Chart with new scheduled times. Debriefed timings stay with the task.

Task Status Flag	Debriefed Timings Present	Reschedule Selected Task	Reschedule Starting at Selected Task	Window Changes	Functional Impact
Assigned, Accepted, or Rejected	No	Yes	Yes	Right click Menu (Task List, Plan Board, Gantt Chart): • Reschedule Selected Task • Reschedule Starting at Selected Task (if child task) The Reschedule buttons in the Task Parent/Child window behave the same as the reschedule options from the right click menu in the Field Service Dispatch Center.	User receives the warning message: Task <task number> has task status Assigned, Accepted, or Rejected. If you reschedule a rejected task to the same technician that rejected it, you will receive a decision message: Resource <resource name> previously rejected the task. Do you want to continue scheduling the selected plan option to the resource. Update new schedule times and assignment if applicable. Old assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Planned Task Status.

Task Status Flag	Debriefed Timings Present	Reschedule Selected Task	Reschedule Starting at Selected Task	Window Changes	Functional Impact
					Task will display in the Plan Board and Gantt Chart with new scheduled times.
Assigned, Accepted, or Rejected	Yes	Yes	Yes	Right click Menu (Task List, Plan Board, Gantt Chart): • Reschedule Selected Task • Reschedule Starting at Selected Task (if child task) The Reschedule buttons in the Task Parent/Child window behave the same as the reschedule options from the right click menu in the Field Service Dispatch Center.	User receives two warning messages: Task <task number> has task status Assigned, Accepted, or Rejected and Task <task number> has Actual Timings. Update new schedule times and assignment if applicable. Old assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Planned Task Status. Task will display in the Plan Board and Gantt Chart with new scheduled times. Debriefed timings stay with the task.

Task Status Flag	Debriefed Timings Present	Reschedule Selected Task	Reschedule Starting at Selected Task	Window Changes	Functional Impact
Working, Completed, Closed, Cancelled, On Hold, or Approved	No or Yes	No	No	N/A	Cannot reschedule a task with a status that has one of these types of flags set.

Canceling a Task

Task Status Flag	Debriefed Timings Present	Cancel Selected Task	Cancel Starting at Selected Task	Window Changes	Functional Impact
Schedulable	No	Yes	Yes	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Cancel Selected Task • Cancel Started at Selected Task (if child task) The Cancel buttons in the Task Parent/Child window behave the same as the cancel options from the right click menu in the Field Service Dispatch Center.	Assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Cancelled Task Status. Task will not display in the Plan Board and Gantt Chart.

Task Status Flag	Debriefed Timings Present	Cancel Selected Task	Cancel Starting at Selected Task	Window Changes	Functional Impact
Schedulable	Yes	Yes	Yes	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Cancel Selected Task • Cancel Started at Selected Task (if child task) The Cancel buttons in the Task Parent/Child window behave the same as the cancel options from the right click menu in the Field Service Dispatch Center.	User receives the warning message: Task <task number> has Actual Timings. Assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Cancelled Task Status. Task will not display in the Plan Board and Gantt Chart. Debriefed timings stay with the task.

Task Status Flag	Debriefed Timings Present	Cancel Selected Task	Cancel Starting at Selected Task	Window Changes	Functional Impact
Assigned, Accepted, or Rejected	No	Yes	Yes	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Cancel Selected Task • Cancel Started at Selected Task (if child task) The Cancel buttons in the Task Parent/Child window behave the same as the cancel options from the right click menu in the Field Service Dispatch Center.	User receives the warning message: Task <task number> has task status Assigned, Accepted, or Rejected. Assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Cancelled Task Status. Task will not display in the Plan Board and Gantt Chart.

Task Status Flag	Debriefed Timings Present	Cancel Selected Task	Cancel Starting at Selected Task	Window Changes	Functional Impact
Assigned, Accepted, or Rejected	Yes	Yes	Yes	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Cancel Selected Task • Cancel Started at Selected Task (if child task) The Cancel buttons in the Task Parent/Child window behave the same as the cancel options from the right click menu in the Field Service Dispatch Center.	User receives two warning messages: Task <task number> has task status Assigned, Accepted, or Rejected and Task <task number> has Actual Timings. Assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Cancelled Task Status. Task will not display in the Plan Board and Gantt Chart. Debriefed timings stay with the task.
Working, Completed, Closed, Cancelled	No or Yes	No	No	N/A	Cannot cancel a task with a status that has one of these types of flags set.

Task Status Flag	Debriefed Timings Present	Cancel Selected Task	Cancel Starting at Selected Task	Window Changes	Functional Impact
On Hold or Approved	No	Yes	Yes	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Cancel Selected Task • Cancel Started at Selected Task (if child task) The Cancel buttons in the Task Parent/Child window behave the same as the cancel options from the right click menu in the Field Service Dispatch Center.	Assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Cancelled Task Status. Task will not display in the Plan Board and Gantt Chart.

Task Status Flag	Debriefed Timings Present	Cancel Selected Task	Cancel Starting at Selected Task	Window Changes	Functional Impact
On Hold or Approved	Yes	Yes	Yes	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Cancel Selected Task • Cancel Started at Selected Task (if child task) The Cancel buttons in the Task Parent/Child window behave the same as the cancel options from the right click menu in the Field Service Dispatch Center.	User receives the warning message: Task <task number> has Actual Timings. Assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Cancelled Task Status. Task will not display in the Plan Board and Gantt Chart. Debriefed timings stay with the task.

Unscheduling a Task

Task Status Flag	Debriefed Timings Present	Unschedule Task	Window Changes	Functional Impact
Schedulable	No	Yes (Option not available for child tasks)	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Unschedule Task The Unschedule button in the Task Parent/Child window behaves the same as the Unschedule option from the right click menu in the Field Service Dispatch Center.	Unschedules the task. Task status is updated with value in profile CSF: Default Unscheduled Task Status. Task will not display in the Plan Board and Gantt Chart.
Schedulable	Yes	Yes (Option not available for child tasks)	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Unschedule Task The Unschedule button in the Task Parent/Child window behaves the same as the Unschedule option from the right click menu in the Field Service Dispatch Center.	User receives the warning message: Task <task number> has Actual Timings. Assignments are changed to the Cancelled status. Task status is updated with value in profile CSF: Default Unscheduled Task Status. Task will not display in the Plan Board and Gantt Chart. Debriefed timings stay with the task.

Task Status Flag	Debriefed Timings Present	Unschedule Task	Window Changes	Functional Impact
Assigned, Accepted or Rejected	No	Yes (Option not available for child tasks)	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Unschedule Task The Unschedule button in the Task Parent/Child window behaves the same as the Unschedule option from the right click menu in the Field Service Dispatch Center.	User receives the warning message: Task <task number> has task status Assigned, Accepted, or Rejected. Assignments are changed to the Cancelled status. Task status is updated with value in profile CSF: Default Unscheduled Task Status. Task will not display in the Plan Board and Gantt Chart.
Assigned, Accepted, or Rejected	Yes	Yes (Option not available for child tasks)	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Unschedule Task The Unschedule button in the Task Parent/Child window behaves the same as the Unschedule option from the right click menu in the Field Service Dispatch Center.	User receives two warning message: Task <task number> has task status Assigned, Accepted, or Rejected and Task <task number> has Actual Timings. Assignments are changed to the Cancelled status. Task status is updated with value in profile CSF: Default Unscheduled Task Status. Task will not display in the Plan Board and Gantt Chart. Debriefed timings stay with the task.

Task Status Flag	Debriefed Timings Present	Unschedule Task	Window Changes	Functional Impact
Working, Completed, Closed, or Cancelled	No or Yes	No	N/A	Cannot unschedule a task with a status that has one of these types of flags set.
On Hold or Approved	No	Yes (Option not available for child tasks)	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Unschedule Task The Unschedule button in the Task Parent/Child window behaves the same as the Unschedule option from the right click menu in the Field Service Dispatch Center.	Assignments are changed to the Cancelled status. Task status will be updated to the value in profile CSF: Default Unscheduled Task Status. Task will not display in the Plan Board and Gantt Chart.
On Hold or Approved	Yes	Yes (Option not available for child tasks)	Right click Menu in the Field Service Dispatch Center (Task List, Plan Board, Gantt Chart): • Unschedule Task The Unschedule button in the Task Parent/Child window behaves the same as the Unschedule option from the right click menu in the Field Service Dispatch Center.	User receives the warning message: Task <task number> has Actual Timings. Assignments are changed to the Cancelled status. Task status is updated with value in profile CSF: Default Unscheduled Task Status. Task will not display in the Plan Board and Gantt Chart. Debriefed timings stay with the task.

6

Managing Field Service Technician Trips

This chapter covers the following topics:

- Overview of Managing Field Service Technician Trips
- Creating Trips from Existing Shift Patterns within the Dispatch Center
- Creating Trips within the Dispatch Center when No Shift Patterns Exist
- Updating Trips within the Dispatch Center
- Creating Trips with Different Departure and Arrival Addresses
- Deleting a Trip within the Dispatch Center
- Manage Field Service Technician Availability
- Blocking Technician Trips
- Unblocking Technician Trips
- Optimizing Technician Trips
- Reserving Technician Personal Time
- Recalculating a Trip
- Recalculating All Trips

Overview of Managing Field Service Technician Trips

You must assign each field service technician to a primary calendar. Calendars have assigned shifts and Field Service trips are created from the shift patterns created within a shift. A trip marks the start time and end time in the day of a technician. Advanced Scheduler schedules tasks within the technician trip. Technician trips are generated by the Generate Field Service Trips concurrent program. They can also be created and managed from the Dispatch Center. Oracle Field Service allows flexibility with regards to start and end times and also provides the ability to specify shift start and end locations in order to support technicians who may begin or end work from different locations.

For more information on creating trips from existing shift patterns refer to the Running the Generate Field Service Trips Concurrent Program, *Oracle Field Service User Guide*.

> **Note:** Before you can schedule trips for technicians you must run the Generate Field Service Trips program.

This chapter covers the following topics:

- Creating Trips from Existing Shift Patterns within the Dispatch Center, page 6-2

- Creating Trips within the Dispatch Center when No Shift Patterns Exist, page 6-3

- Updating Trips within the Dispatch Center, page 6-3

- Creating Trips with Different Departure and Arrival Addresses, page 6-4

- Deleting a Trip within the Dispatch Center, page 6-5

- Manage Field Service Technician Availability, page 6-5

- Blocking Technician Trips, page 6-6

- Unblocking Technician Trips, page 6-7

- Optimizing Technician Trips, page 6-7

- Reserving Technician Personal Time, page 6-10

- Recalculating a Trip, page 6-12

- Recalculating All Trips, page 6-12

Creating Trips from Existing Shift Patterns within the Dispatch Center

You can create trips within the Dispatch Center from the existing shift patterns for the day.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Click on the Gantt icon or the Planboard icon.

3. Right-click on a technician name.

4. Select Create Trip.

5. Click Yes in response to the message, "Resource has a shift pattern on this day. Do you want to create Trips from shift patterns?"

    Departure and Arrival shift tasks appear in the Planboard and the scheduling chart. A trip will not be created if:

    • It has already been created from the shift pattern.

    • A trip that overlaps with the shift pattern already exists.

Creating Trips within the Dispatch Center when No Shift Patterns Exist

You can create trips within the Dispatch Center even when no shift patterns exist for the day.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Click on the Gantt icon or the Planboard icon.

3. Right click on a technician name.

4. Select Create Trip.

5. Click No in response to the message, "Resource has a shift pattern on this day. Do you want to create Trips from shift patterns?"

    The Create Trip window appears.

6. Modify the values (as needed). You can change the trip timings, trip type (Regular and Standby), and the trip start and end locations.

7. Click OK.

    Departure and Arrival shift tasks appear in the Planboard and the scheduling chart.

    The trip will not be created if a trip that overlaps with the timings entered in the Create Trip user interface already exists.

Updating Trips within the Dispatch Center

You can update trips (created using the Generate Field Service Trips concurrent program or Create Trip user interface) from within the Dispatch Center.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Click on the Gantt icon or the Planboard icon.

3. Right-click on the departure or arrival task of a technician trip.

4. Select Update Trip. The Update Trip window appears.

5. Modify the values (as needed). You can change the trip timings, trip type (Regular and Standby), and the trip start and end locations.

6. Click OK.

   Departure and arrival shift tasks are updated and displayed in the Planboard and the scheduling chart accordingly. When tasks exist within a trip:

   • The trip type can be updated but with a warning.

   • New trip timings also should encompass the existing tasks.

   • New trip timings do not overlap with existing trips (This is applicable for a trip without tasks too).

Creating Trips with Different Departure and Arrival Addresses

You can create trips with different departure and arrival addresses.

> **Note:** You can invoke the Generate Field Service Trips concurrent program with the option to enter a default start location for each technician. The default address is based on the profile CSF: Shift Task Address Source.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Click on the Gantt icon or the Planboard icon.

3. Right click on a technician name.

4. Select Create Trip.

5. Click No in response to the message, "Resource has a shift pattern on this day. Do you want to create Trips from shift patterns?"

   The Create Trip window appears.

6. To change the start location, choose a different location from the Source list within the Trip Start Location block.

7. To change the end location, choose a different location from the Source list within the Trip End Location block.

> **Note:** You can enter a new address by selecting One-Time Address from the Source list and then you must enter the address details.

8. Click OK.

Deleting a Trip within the Dispatch Center

You can delete a trip within the Dispatch Center.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Click on the Gantt icon or the Planboard icon.

3. Right click on the departure or arrival task of a technician trip.

4. Select Delete Trip.

    The selected trip is deleted. This is possible only when no tasks are scheduled within the selected trip.

Manage Field Service Technician Availability

In thre event that one or more field technicians unexpectedly become unavailable, dispatchers can use Schedule Management functionality to unschedule tasks, and then temporarily block technician trips to prevent the Advanced Scheduler from automatically scheduling further tasks to those technicians. Alternatively, dispatchers can drag and drop assigned tasks in the Scheduling Chart to reschedule them to other technicians and recalculate trips. For more information on rescheduling tasks directly from the Dispatch Center, see Rescheduling a Scheduled Task from the Gantt View, page 5-42.

Dispatchers can also create personal tasks for technicians directly from the Dispatch Center for the period in which they are unavailable. For more information, see Steps to Create a Personal Task from the Dispatch Center, page 6-11.

Plus, dispatchers can use the Schedule Management functionality to optimize the trips among the technicians in their selected territories. Dispatchers will be able to pick and choose the technicians and the date range for which they want to achieve optimized trips. The dispatcher can also choose Optimize functionality to reschedule tasks from blocked trips to unblocked trips. For more information, see the *Oracle Advanced Scheduler User Guide*.

Schedule Management functions include:

- Blocking Technician Trips, page 6-6

- Unblocking Technician Trips, page 6-7

- Optimizing Technician Trips, page 6-7

> **Note:** For information on unscheduling tasks from the Schedule
> Management window, see Unscheduling Tasks, page 5-23.

Blocking Technician Trips

From the Schedule Management window, a dispatcher can block one or more trips. This action prevents new assignments for the technician, and temporarily freezes the task assignments in the blocked trip.

Use the following procedure to block a trip.

Steps:

1. Navigate to the Schedule Management window, page A-2.

   > **Note:** If you navigate to the Schedule Management window from
   > the Plan Board or the Gantt view, only the selected resource
   > displays.

   The Schedule Management window appears.

2. Select the check boxes next to the resource names for technicians that you want to block trips. You can select multiple check boxes to block trips for multiple technicians. If you want to block trips for all technicians, select the Select All check box.

3. In the Trips section, select the Start and End dates and times for the trips you want to block.

4. In the Actions section of the window, select Block in the Trips field.

5. Click OK.

   The trips for the date range you specified are blocked in the Plan Board and the Gantt views.

Unblocking Technician Trips

You can unblock trips that have previously been blocked. You can also unblock trips for a specified date range and for multiple technicians. When you unblock a trip all tasks in that trip return to a task status of Planned.

Use this procedure to unblock trips.

Steps:

1. Navigate to the Schedule Management window, page A-2.

    > **Note:** If you navigate to the Schedule Management window from the Plan Board or the Gantt view, only the selected resource displays.

    The Schedule Management window appears.

2. To unblock a trip, select the check box located next to the resource name for the technician schedule that you want to unblock. You can select multiple check boxes to unblock trips for multiple technicians. If you want to unblock trips for all technicians, select the Select All check box.

3. In the Trips section, select the Start and End dates and times for the trips that you want to unblock.

4. In the Actions section of the window, select Unblock in the Trips field.

5. Click OK.

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

Optimizing Technician Trips

From the Schedule Management window you can reschedule and reassign tasks from one trip to another. You can select the technician trips that should be optimized. The source trips can include trips which are blocked or past dated but the destination trips cannot be in blocked status or within past dated trips. Select the trip action of Optimize to achieve the desired result. Upon selecting the technicians, date range and action, the tasks are optimized to the selected technicians.

A dispatcher can optimize the trips of multiple technicians spanning several days. All uncommitted tasks are considered by the optimization process. During the optimization

process tasks are geographically clustered (if spatial data is available) and scheduled to the eligible technicians. Optimization tries to schedule a cluster of tasks to a single technician provided that there is free time in his or her trip to accommodate the tasks in the cluster.

For more information on the optimization across trips functionality, see Optimizing Technician Schedules Across Trips, *Oracle Advanced Scheduler User Guide* and Optimizing One or More Trips From the Dispatch Center, page 6-9.

Use the following procedure to optimize trips for multiple technicians.

Prerequisites

❒ Advanced Scheduler is implemented.

❒ Optimization Across Trips parameters are set up.

Optimizing Technician Trips from the Schedule Management Window:

1. Navigate to the Schedule Management window, page A-2.

   > **Note:** If you navigate to the Schedule Management window from the Plan Board or the Gantt view, only the selected resource displays.

   The Schedule Management window appears.

2. Select the check boxes next to the resource names for technicians that you want to optimize the trips for. You can select multiple check boxes to optimize trips for multiple technicians. If you want to optimize trips for all technicians, select the Select All check box.

3. In the Trips section, select the Start and End dates and times for the trips you want to optimize.

4. In the Actions section of the window, select Optimize in the Trips field.

5. Click OK.

   The trips for the date range and technicians you specified are optimized. The Optimization Across Trips concurrent program is launched in the background.

   In addition, the Optimization Across Trips program will generate an output file. This output file contains information about the optimization process such as, tasks that were auto-rejected during the process and trips that were skipped and the reasons why they were skipped.

   For more information on the output file, see Running the Optimization Across Trips Concurrent Program, *Oracle Advanced Scheduler User Guide*.

Overview of Optimizing One or More Trips From the Dispatch Center:

From the Field Service Dispatch Center Plan Board view you can optimize a single trip for a technician or you can optimize all trips for technicians that appear in the Plan Board view.

When optimizing one trip for a technician, the Field Service Optimize Trip functionality rearranges schedulable tasks and recalculates travel time for each task in a trip for a single resource so as to minimize total costs. Tasks planned start and end date timings, priority, and cost parameters set up in Advanced Scheduler will influence the task sequence.

During single trip optimization, Advanced Scheduler unplans all tasks in the trip. It then reschedules the tasks one by one within the same trip finding the most cost effective position in a sequence. The sequence of tasks within the trip can change.

When optimizing trips for all technicians for a specific date, the optimization across trips functionality identifies all schedulable tasks within the technician trips and then schedules them optimally to the eligible technicians.

For more information on optimizing across trips, see Optimizing Technician Schedules Across Trips, *Oracle Advanced Scheduler User Guide*.

For more information for optimizing blocked or past dated trips, see Optimizing Technician Trips, page 6-7.

Use these procedures to optimize one or more trips from the Dispatch Center:

To Optimize One Trip from the Field Service Dispatch Center:

1. Navigate to the Field Service Dispatch Center, page A-2.

   The Dispatch Center window appears to the Task view.

2. Click the Plan Board icon.

   The Plan Board view appears to display technician trips and tasks.

3. Right-click a departure task, and then select Optimize from the right-click menu.

   The optimization process for the trip is performed immediately.

To Optimize More Than One Trip from the Field Service Dispatch Center:

1. Navigate to the Field Service Dispatch Center, page A-2.

   The Dispatch Center window appears to the Task view.

2. Click the Plan Board icon.

   The Plan Board view appears to display technician trips and tasks.

3. Select Optimize Across Trips from the Tool menu (Tools > Optimize Across Trips).

> **Note:** The Optimize Across Trips menu option is only available in the Plan Board view of the Field Service Dispatch Center. This option is not available in the Task, Gantt, and Map views.

The Optimization Across Trips concurrent program is initiated for the technicians and selected date on the Plan Board.

In addition, the Optimization Across Trips program will generate an output file. This output file contains information about the optimization process such as, tasks that were auto-rejected during the process and trips that were skipped and the reasons why they were skipped.

For more information on the output file, see Running the Optimization Across Trips Concurrent Program, *Oracle Advanced Scheduler User Guide*.

Reserving Technician Personal Time

Personal time for appointments, meetings, training, and vacations can be reserved to prevent task assignments during that time. Dispatchers can enter the personal time off requested by a technician if the technician does not have access to Mobile Field Service or the Field Service Technician Portal.

You can navigate to Task Management to create a personal task or you can create it using the right click technician menu in the Scheduling Chart or the Plan Board view of the Dispatch Center.

Steps to Create a Personal Task Using Task Management:

1. Navigate to the Tasks window, page A-2.

   The Find Tasks window appears in the foreground of the Tasks window.

2. Click New.

   The Find Tasks window closes.

3. On the Tasks window, create a task for personal time. Enter the Subject field.

4. Select the type of time off in the Type field. For example appointment.

5. Select the status of Assigned in the task Status field.

6. Select the Owner Type and Owner of the individual requesting the personal time.

7. In the Dates section, enter the planned and scheduled start date and time of the personal time.

8. In the Effort section, enter the planned effort and duration of the personal time.

9. Save the task.

    The task number is automatically assigned. The status for the task is Assigned.

10. Click the More button.

    The Task Details window appears.

11. Under the Assignments section, enter the type and name of the individual requesting the personal time and a status of Assigned.

12. Click OK and then save the task again.

13. Navigate to the Field Service Dispatch Center, page A-2.

14. Access the Plan Board or Gantt view by clicking the Plan Board or Gantt icons.

    The personal task appears on the technician's schedule.

    The Advanced Scheduler will take into consideration technicians personal time off when scheduling tasks to technicians.

    > **Note:** The personal time task will not appear in the Task List section of the Dispatch Center because the personal time task is not associated to a service request.

Steps to Create a Personal Task from the Dispatch Center:

1. Navigate to the Scheduling Chart or Plan Board view of the Field Service Dispatch Center, page A-2.

2. Find the technician for whom you want to create the personal task.

3. Right click on the name of the technician and select the Create Personal Task menu option.

4. The Personal Task window opens with time zone and location sources, scheduled start and end dates, and other task details automatically populated. You can edit this information, if required.

5. Enter the name and description of the task and edit the scheduled date range of the task and the effort or time to be reserved for the task, if required.

    > **Note:** The status of the task is approved by default as technicians usually take time off within their shift timings for personal tasks with the approval of their managers.

6. Enter the address of the location for the personal task. You can enter a one-time address (City and Zip or both). You can also select an existing address for the location. Advanced Scheduler considers this while scheduling other consecutive tasks around this personal task and can calculate the required travel time and distance to perform the next field task.

7. Click OK to save your work.

8. Return to the Scheduling Chart or Plan Board view to see this task. Once created, you can update or cancel the task, if required, using the technician right click menu.

Recalculating a Trip

When a task has been added to a trip or a task has been removed from an existing trip, the dispatcher can use the recalculate trip functionality to recalculate the travel time of all tasks in that particular trip. See Recalculating All Trips, page 6-12.

Recalculating a trip takes into account the planned and scheduled start date and time of the tasks and travel time and duration. This feature also enables you to manually make changes to the trip without invoking Advanced Scheduler.

Use the following procedure to recalculate a service trip after task assignment, but before task commitment.

Prerequisites

❒ Advanced Scheduler is implemented.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. From the Dispatch Center, click the Plan Board icon.

   The Plan Board view appears to display technician trips and tasks.

3. Select and right-click a departure task.

   The right-click menu appears.

4. Select Recalculate from the right-click menu.

   Gaps or overlaps in the trip are removed and travel times are recalculated.

Recalculating All Trips

The Recalculate all trips functionality of Field Service recalculates the trips of all resources displayed on the Plan Board. Time gaps and overlaps are removed and travel

times are recalculated, but the sequences of tasks within trips are not altered.

Use this procedure to recalculate all service technician trips that display on the Plan Board after task assignment, and before task commitment.

Prerequisites

❒ Advanced Scheduler must be installed.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. From the Dispatch Center, click the Plan Board icon to open the Plan Board view.

   The Plan Board view appears to display technician trips and tasks.

3. From the Tools menu, select Recalculate All Trips.

   The process is performed immediately for the selected date in the Plan Board. A window appears to report the number of updated trips, and whether errors occurred.

7

Using Maps in the Field Service Dispatch Center

This chapter covers the following topics:

- Understanding the Map Integration
- Viewing Technician Location and Trip
- Viewing Selected Tasks and All Technician Locations
- Viewing Territory Tasks and All Technician Locations
- Plotting Eligible Technicians for a Task
- Using Guided Maps in Field Service
- Understanding the Tool Tip Details

Understanding the Map Integration

The Oracle Field Service application provides customers with an option to view and track information about technicians, task status, and task incident address locations in a more interactive way through Google or eLocation Maps. These maps make it easy for the dispatchers to visualize key business information. With this new functionality, the Field Service application enables customers with or without spatial data information, to have a pictorial view of the tasks, task status, and technicians location details. These maps provides a high performance, visually appealing, and interactive map viewing experience, with all the capabilities built-in such as, zooming in and out, panning or scrolling, and printing.

In addition, if you set up Global Positioning System (GPS) and assigned GPS devices to technicians, you can plot GPS locations of technicians and tasks on Google or eLocation Maps. This enables dispatchers adjust and fine tune schedules on an ongoing basis to manage tasks and technicians. For example, if an emergency job comes up and a technician has to show up at that customer location immediately or if a technician at a customer location has an urgent requirement for spare parts or for help, having real

time GPS information on the location of eligible technicians closest to the task location enables dispatchers handle the emergency more efficiently in terms of time, cost, and customer satisfaction.

For more information on implementing and setting up Google or eLocation Maps, see Setting Up Maps in the *Oracle Field Service Implementation Guide.*

For more information on implementing GPS, see Setting up GPS in the *Oracle Field Service Implementation Guide*.

For more information on the Map integration with the Field Service Technician Portal, see Viewing Tasks on Maps, page 8-11.

Prerequisites

Rendering technician trips, task location, tasks within resources of the selected territories, and tasks fetched by executing the task query onto Google or eLocation maps requires that the addresses and locations be geo-coded. Oracle Advanced Scheduler geo-codes tasks whose locations have not been previously geo-coded, by leveraging the geo-spatial dataset loaded within Oracle Field Service schema. Google Map tries to resolve and display tasks, which are not geo-coded, either in case the geo-spatial data is not loaded or for tasks not resolved earlier by Oracle Geo-coder. If neither spatial data nor Google Maps is available, then Field Service uses eLocation Maps to resolve task addresses for display.

The geo-coder, which is part of the Oracle Advanced Scheduler, has been extended to support country specific address formats and currently provides support for more than 70 countries which includes, North America (Canada, United States, and Mexico), and European & World Markets datasets.

For more information, please see the *Oracle Advanced Scheduler User Guide*.

Viewing Technician Location and Trip

Use this procedure to view the current location of the resource and all the tasks in the resource trip along with Shift tasks. The map displays all the tasks in the trip connected by a line that represents the best route for the resource to perform the assigned tasks.

Prerequisites

❒ Set up Google or eLocation Maps.

Oracle Advanced Scheduler geo-codes tasks whose locations have not been previously geo-coded, by leveraging the geo-spatial dataset loaded within the Oracle Field Service schema.

❒ Set up GPS.

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Perform one of these options:

   • Right click on a Resource Name in the Plan Board.

   • Right click on a Resource Name in the Gantt chart.

3. Select **View Technician Location on Map**

   If you set up GPS and the resource was assigned a registered device, the current location of the resource is displayed on the map with the tool tip displaying the exact address of this location and the resource's GPS status if at home, stopped, traveling, off the road, or unknown.

   On the map, the plotted resource trip is always for the date viewed in the Plan Board or the Gantt chart. The start and end addresses can be departure and arrival task addresses or as specified by the resource. Markers are plotted at the customer incident addresses, with sequence numbers depicting the order of the task in the trip. This is also the order in which the technician is supposed to visit the customer, based on the scheduled start times of the tasks.

Viewing Selected Tasks and All Technician Locations

Use this procedure to view one or more selected tasks on Google or eLocation Maps and all the resources that belong to the territories managed by the dispatcher.

Prerequisites

❒ Set up Google or eLocation Maps.

Oracle Advanced Scheduler geo-codes tasks whose locations have not been previously geo-coded, by leveraging the geo-spatial dataset loaded within the Oracle Field Service schema.

❒ Set up GPS.

Viewing Selected Task or Tasks and Technicians location on Map:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Perform one of these options:

   • Select one task from the task list table of the Dispatch Center.

- Select multiple tasks from the task list table of the Dispatch Center.

Then, from the Map Options menu, select **View Selected Tasks(s) on Map**.

This invokes the Map and plots the incident addresses of the tasks. The tool tip for the task marker displays additional information about the task such as customer, assigned resource, task number, assignment status, planned effort, and scheduled and planned dates.

Viewing Territory Tasks and All Technician Locations

Use this procedure to view on the map all the tasks assigned to the resources in the territories for which the logged in dispatcher is responsible. These are the tasks scheduled to technicians that are displayed in the Plan Board or Gantt chart for the date entered therein.

Prerequisites

❒ Set up Google or eLocation Maps.

Oracle Advanced Scheduler geo-codes tasks whose locations have not been previously geo-coded, by leveraging the geo-spatial dataset loaded within the Oracle Field Service schema.

❒ Set up GPS

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. From the Map Options menu, select **View all Territory Task(s) on Map**

This invokes the map for the selected territory resources in the Plan Board or Gantt chart as of the selected active date. This option does not plot the departure and arrival tasks of the technicians.

If the information regarding tasks, incidents, and technicians location has valid addresses then the tasks and locations are rendered on the map. Oracle transfers unresolved task addresses to Google or eLocation for resolution. If the address of the task to be marked on the map, is not resolved either by Oracle Geo-coder or by Google, then the task is listed in the Unresolved section of the map.

The Task Marker Icon reflects the color of the corresponding task status, as per the color scheme set up. A tool tip is enabled for the task (marker/icon displayed on the map) with two tabs 'Task Info' and 'Address' when you click on the marker of the task plotted.

Plotting Eligible Technicians for a Task

Use this procedure to view a selected task on the map and plot eligible technicians for this task. Oracle Advanced Scheduler only consider qualified resources for the task as determined by scheduler parameters for resource consideration.

Prerequisites

❏ Set up Google or eLocation Maps.

Oracle Advanced Scheduler geo-codes tasks whose locations have not been previously geo-coded, by leveraging the geo-spatial dataset loaded within the Oracle Field Service schema.

❏ Set up GPS

Steps:

1. Navigate to the Field Service Dispatch Center, page A-2.

2. Right click on a task in the task lists table in the Dispatch Center and select View Task on the Map.

   This invokes the Google or eLocation Map with the selected task plotted and the Plot Eligible Technicians button available. If you click this button, resources qualified to handle this tasks and closest to the location of the task are displayed.

   The system considers resources using the appropriate scheduler parameters..

Using Guided Maps in Field Service

You can invoke Google or eLocation Map in a standalone mode either from the Dispatch Center or directly from the navigator under Field Service Setup. The Map window is capable of displaying task related information based on the guided search options and filters provided on the window.

Navigation: Field Service Dispatcher > Dispatch Center > Map Options > Launch Map

Navigation: Field Service Manager > Field Service Setup > Launch Map

You can choose to plot tasks by criteria rendered for tasks, resources or resource trips. This window enables you to plot tasks on the map based on your selections.

- If you select the Tasks mode, you can further choose to plot by selected territories or by a selected task list query. In addition, you can plot the nearest, eligible technicians.

- If you select the Resources mode, you can further choose to plot by selected

resources available under the dispatcher's territories.

- If you select the Resource Trips mode, you can further choose to plot by trip date and selected resources in the dispatcher's territories, or by trip date and selected territories.

Tasks are plotted on the map for the resources and territories criteria considering the date selected. For task list query, date has no effect.

Viewing Tasks Belonging to Selected Resources

The resources are populated in the Available Resources section, based on the territories that have been selected in the Dispatch Center or the territories that have been assigned to the dispatcher. To plot the tasks for those technicians and for a specific date (selected on the Map) that you are interested in, you can move the desired technicians to the 'Selected' section. Once the selection is complete, clicking the Refresh button will plot the resolved tasks scheduled to the selected resources on the map. The departure and arrival task information for the selected resources also displays on the map.

When there are multiple resources plotted on the map, upon selecting a resource name in the drop-down list box field, all the tasks scheduled to that resource alone are plotted on the map.

Viewing Tasks in a Task List Query

All task list queries available in the Field Service Dispatch Center are listed here. Upon selecting a task list query, the tasks retrieved by executing the query are rendered on the map.

Viewing Tasks Belonging to All Technicians of Selected Territories

The territories are populated in the Available Territories section, based on the territories that have been selected in the Dispatch Center or the territories that have been assigned to the logged in dispatcher. You can move the desired territories to the 'Selected' section to plot the tasks for those territory resources alone for the date selected on the map. After the selection is done, clicking Refresh will plot all the resolved tasks scheduled to the selected territory resources on the map.

When multiple tasks are plotted on the Google map, there is an option to zoom into the tasks plotted on the map by selecting the task in the drop-down list box field. To view the location of the task with tool tip information you can search for the task number in the Find task text field displayed in the map area.

When multiple Tasks of same location are plotted on the eLocation Map, an unique identifing icon * is plotted on that location. Clicking on the * icon invokes a popup window listing all the task numbers plotted on that location.

Understanding the Tool Tip Details

This table describes the details of the tool tip for the Task Marker/Icon that appears on Maps.

Task Info Label	Task Info Description	Address Label	Address Description	Resolved Address Label	Resolved Address Description
Task	Task Number	Road	Road Name	Road	Road Name
Customer	Customer Name	City	City Name	City	City Name
Assignment Status	Task Assignment Status	State	State	State	State
Task Status **Note:** This label would only display if the task has multiple assignees.	Task Status	Postal Code	Postal Code	Postal Code	Postal Code
Resource	Resource Address	Country	Country	Country	Country
Planned Effort	Planned effort of task	Person	Primary Contact Person	N/A	N/A
Planned Start	Planned start date and time of task	Phone	Phone number of the contact person	N/A	N/A

Task Info Label	Task Info Description	Address Label	Address Description	Resolved Address Label	Resolved Address Description
End	Planned end date and time of task	Travel Duration	Time required to travel to this task from the previous task (in minutes)	N/A	N/A
Scheduled Start	Scheduled start date and time of task	Distance	Distance to travel to this task from the previous task (in Kilometers)	N/A	N/A
End	Scheduled end date and time of task	N/A	N/A	N/A	N/A

8

Receiving and Accepting Work Assignments

This chapter covers the following topics:

- Explaining the Elements of the Field Service Technician Dashboard
- Explaining Quick Links to Key Processes
- Customizing Dashboard Views
- Personalizing an Existing View
- Creating a New View
- Viewing the Technicians Calendar
- Viewing Tasks on Maps
- Receiving Work Tasks
- Understanding Task Updates
- Understanding the Update Task Page
- Updating Task Assignment Status
- Accepting or Rejecting Tasks
- Field Service Task Assignment Alerts Workflow
- Ordering Parts for Trunk Stock
- Ordering Parts for a Specific Task
- Managing Trunk Stock
- Receiving Shipments
- Starting Work
- Viewing Service Request Details
- Viewing Parts Requirements
- Creating Service Requests

Explaining the Elements of the Field Service Technician Dashboard

The Field Service Technician Portal (Dashboard) provides several convenient entry points into the application. Views of assigned tasks can be personalized and filtered in several ways.

Field Service Technician Dashboard (1 of 2)

Quick Links

Create Parts Order
Receive Shipments
Return Excess Parts
Return Defective Parts
Calendar
Trunk Stock Management

Create Service Request

⊙ Use existing Service Identifier
Search Key   Customer Number   ⌄
Value   [   ]   🔍
[Go]

Search Knowledge

*Keywords
[   ]
⊙ Knowledge Search
○ Advanced Solution Search
[Go]

The page is divided into two tabs: Graphs and Dashboard. The Dashboard tab has the following five components:

- Search and Advanced Search, page 8-3

- Seeded Views, page 8-4

- Search Knowledge, page 8-5

- Quick Links, page 8-5

- Create Service Requests, page 8-5

Search and Advanced Search

The Field Service Technician Dashboard enables you to search for task-related information based on Customer Name, Service Request, or Task Number. By selecting a criterion in the Search Task By field, and then entering a partial value in the Search

Criteria field, technicians can quickly retrieve specific task information.

Advanced Search functionality is also available. By clicking the Advanced Search link, the Advanced Search page appears, where more detailed criteria can be entered. For example, a search based on a specified task Scheduled Start Date.

Seeded Views

The Field Service Technician Dashboard has three seeded views:

- Escalated Tasks

- Open Tasks

- Today's Tasks

In each of these, the search criteria and the display columns cannot be modified. The seeded views display the following information in the table:

- Task details

- Service Request number

- Customer name

- Task number

- Update task icon

- Subject

- Scheduled Start Date

- Planned Effort

- Parts icon (if any)

- Assignment status

- Debrief icon

- Schedule icon

The summary table associated with a view displays relevant task information for each task that fits the search criteria for the technician. For example, the Open Tasks view displays all tasks assigned to the technician that have not been canceled or closed.

Updating a task, can be performed directly from the dashboard view. Technicians can drill down to task details, view service request details, and open a debrief. Additionally, the technician can view parts associated with the task, view Install Base details,

schedule a task, and if Google Maps is implemented they can invoke and render the tasks associated with the view on Google Maps.

Personalized Views display selected columns containing information related to those tasks. Technicians can access any of the seeded or personalized views, and can select a view that will appear by default.

Search Knowledge

The Field Service Technician Dashboard enables easy access to the Oracle Knowledge Management application. A user can perform either a simple keyword search or an advanced solution search from the Field Service Technician Dashboard. This functionality enables a technician to access existing solutions for task-related problems.

You can also access Knowledge Management through the Update Task page. In this case, the Service Request Summary appears by default in the keyword search field, although it can be modified as needed.

Quick Links

The Quick Links section provides navigation links to several Field Service processes:

- Create Parts Order

- Receive Shipments

- Parts Search

- Receive Parts

- Parts Return

- Search eRecord Evidence Store

- Calendar

- Trunk Stock Management

- Transaction History

- Preferences

- Field Service Resource Setup: select a resource and click the Field Service Resource Setup link to modify the resource details. You can use any of the following subtabs to update the resource details: user names and responsibilities, roles and groups, territories, calendars, addresses and subinventories, and skills

Create Service Request

While working on a task at the customer site, technicians sometimes discover that a new service request must be logged to address a customer issue that was not addressed in the original service request. You can restrict the creation of this new service request in the context of an open task, in which case, the technician can only create the new service request from the Update Task page. To restrict the technician, set the CSF:Restrict Service Request Creation to Scheduled Site profile to Yes at the responsibility level.

To enable the technician to create a new service request using the direct link from the Field Service Technician Dashboard set the profile to No. The technician can then create a new service request by using existing service identifiers, such as part serial number, tag number, instance address, account name, and so on.

Explaining Quick Links to Key Processes

The Field Service Technician Dashboard provides quick access to key processes needed to perform these day-to-day material management activities:

- Create Parts Order

  - Ordering Parts for Trunk Stock, page 8-21

  - Ordering Parts for a Specific Task, page 8-24

- Receive Shipments , page 8-27

- Return Excess Parts, page 9-27

- Return Defective Parts, page 9-29

- Search eRecord Evidence Store, page 9-22

- Calendar

  - View Technicians Calendar, page 8-9

- Trunk Stock Management, page 8-26

Customizing Dashboard Views

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

search criteria are determined by the technician.

Use these procedures to customize the dashboard:

- Personalizing an Existing View, page 8-7.

- Creating a New View, page 8-8.

Personalizing an Existing View

You can personalize any of the views in the dashboard by duplicating the view under a different name, and then changing the parameters for the duplicated view to fit your needs.

Use this procedure to personalize an existing view.

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. From the main dashboard page, click Personalize.

3. In the table, select the Select option next to the view that you want to personalize.

4. Click Duplicate.

   The Duplicate View page appears. In this page, all the values of the original view are selected and displayed in the various fields and dialog boxes. You can modify any or all of the display fields.

5. In the View Name field, enter a name for the new view.

6. You can change any of the settings in the General Properties section (rows displayed, whether to set the view as the default, and the description.)

7. Modify the columns that you want appear in your view. To remove a column, move it from the Columns Displayed dialog box to the Available Columns dialog box. To add a column to the view, move it from the Available Columns dialog box into the Columns Displayed dialog box.

8. (Optional) To rename the columns, click Rename Columns/Totaling.

9. Change the column names as desired, and then click Apply.

10. Define new Sort Settings, if applicable.

11. You can add additional task search parameters to the view in the Search Query to Filter Data in the Table section.

12. When you have finished modifying the view, click Apply.

Creating a New View

You can create a new view for the dashboard that displays the data you want to view. New views are added to the list of existing views, and you can modify or display them at any time.

When creating a view, you can set the number of tasks to display, designate the new view as your default view, determine which columns to display and the column sequence, and define task search criteria.

Use this procedure to create a new view for use on the dashboard:

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. From the main dashboard page, click Personalize.

The Personalize Views page appears. This page displays a table listing the existing views.

3. Click Create View.

The Create View page appears.

4. In the General Properties region, enter the View Name.

5. Select the Number of Rows Displayed from the drop-down list.

This field determines how many tasks display for the view.

6. If you want this to be your default view, select the Set as Default check box.

7. Enter a brief description of the view.

In the Column Properties section, all the columns that can appear in the view are listed in the Columns Displayed dialog box.

8. Select the columns that you do not want to have appear in your view from the Columns Displayed dialog box and remove them to the Available Columns dialog box.

You can rearrange the order of the columns by using the up and down arrows to move them into the desired order.

9. In the Sort Settings region, select the column you want to sort by, and then select whether the sort order should be in ascending or descending order.

You can sort up to three columns. There is no sort order selected by default.

10. In the "Search Query to Filter Data in your Table" region, set your criteria for the task search.

   By selecting the appropriate option, you can specify that a search match requires *all* search parameters be met, or *any* of the parameters be met.

11. Select a search parameter. The four default search parameters are service request, customer, task, and scheduled start date. You can use one or any combination of these parameters.

12. After you select a search parameter, choose the qualifier you want to use to filter the parameter.

   The following search qualifiers are available: is, is not, contains, starts with, ends with.

13. Enter a value in the value field.

   Example
   For example, if you want to set up a view that only displays tasks associated with a particular customer. Use this search criteria construction:

   Search Criteria Example

Parameter	Search Qualifier	Value
Customer	is	<Customer Name>

14. (Optional) Add another search parameter by selecting it from the list of values in the Add Another drop-down list, and then click Add.

15. To save the view, click Apply.

Viewing the Technicians Calendar

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

Use this procedure to view the calendar:

Steps:

Opening the Calendar

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. From the Quick Links section, click the Calendar link.

   The technicians calendar appears in the daily view for the current date by default.

Navigating in the Calendar

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

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

   The Weekly or Monthly calendar format appears to display the current week or month, depending on which tab was selected.

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

6. On the Monthly tab, to view the previous or next month, select a different month and year in the View fields. Click the Current Month button to display the current month.

7. To view the calendar for a specific day, click the calendar date link from the Weekly or Monthly tab.

   The Daily tab appears for the date selected.

Viewing Task Details

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

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

Printing the Calendar

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

Closing the Calendar

11. To close the calendar, click the Field Service Technician Dashboard link in the top left of the page.

Viewing Tasks on Maps

If you have installed and set up Google Maps you have the ability to invoke and render the tasks that appear for the view that you select on the Field Service Technician portal on Google Maps.I f you have not set up Google Maps, you can view selected tasks on Field Service's eLocation Maps.

The Show Tasks on Map button appears at the top of the task summary table of the Field Service Technician Dashboard portal. When you click this button, a new window will appear and all the tasks associated with the view are rendered on the Google Map

For more information on installing and setting up Maps, see the *Oracle Field Service Implementation Guide*.

For more information on the integration of Google or eLocation Maps with the Field Service Dispatch Center, see Understanding the Map Integration, page 7-1.

Receiving Work Tasks

The commit process releases work to the technicians. See Releasing Work to the Field, page 5-40. When the schedule is committed, the *task status* changes to *Assigned.* Work assignments are then available to Field Service technicians through the Field Service Technician Dashboard.

The Task Status setup in the Task and Escalation Status window determines whether tasks at a given status are sent to the Field Service Technician Dashboard, and whether those tasks can be updated from the Dashboard.

On the Task and Escalation Status window (Field Service Manager: Field Service Setup > CRM Foundation > Task and Escalation Manager > Setup > Define Task Status) if the check box in the Assigned column is selected for a given task status, then you can work with tasks at that status from the Dashboard. Selecting the corresponding Schedulable check box enables scheduling in Oracle Field Service and makes task information available to the technician dashboard in view only mode.

For more information about Task Statuses and Transition Rules, see Setting Up Task Status and Transition Rule in the *Oracle Field Service Implementation Guide.*

For more information on the task status check boxes, see the Defining Task Statuses and Status Transition Rules section of the *Oracle Common Application Calendar Implementation Guide.*

For more information on the task types check boxes, see the Defining Task Types section of the *Oracle Common Application Calendar Implementation Guide.*

Service technicians report on *task assignment status*. The Field Service Technician Dashboard opens to the default view designated by the technician. The technician can select other existing views from the list of values, create custom views, and designate a different default view. The view determines which columns of information appear. The view can be set up to filter the displayed tasks. For example the technician can define a

view to display only tasks that are at Task Assignment Status: *Assigned.* In this way, when the technician opens the dashboard, all assigned tasks appear. See Customizing Dashboard Views, page 8-6.

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

   The Field Service Technician Dashboard for the logged in technician appears to the view designated as the default view.

2. Select a view that displays tasks having the Task Assignment Status filter set to *Assigned.*

   To create a personalized view, see Customizing Dashboard Views, page 8-6.

   All tasks assigned to the technician appear in the dashboard.

Understanding Task Updates

The Field Service Technician Portal (Dashboard) displays the tasks assigned to the technician in the task summary table. Details display according to the selected view. Technicians can perform these functions from the task summary table:

- Update an existing task by clicking the Update icon for the appropriate task in the table view.

  The Update Task page appears displaying the Details sub tab.

- View the part requirements for a task or create a new parts order for the task by clicking the Parts icon for the appropriate task in the table view.

  The Update Task page appears displaying the Parts sub tab.

- Perform debrief on the task by clicking the Debrief icon for the appropriate task in the table view.

  The Update Task page appears displaying the Debrief sub tab. Debrief enables the following:

  - Update Task Assignment Status, page 8-16

  - Debrief Procedures, page 9-1, such as capturing travel, labor, material and expense details

  - Update Task Details and Notes, page 9-20

  - Create a Follow-Up Task, page 9-4.

- Schedule a task by clicking the Schedule icon for the appropriate task in the table

view.

The Schedule Task page appears.

For information on scheduling tasks, see Scheduling Tasks, page 9-2.

Understanding the Update Task Page

Update Task: Title

The Task Name and Task Number appear in the title of the Update Task page.

Update Task: Header

The header region of the Update Task page contains the following information:

Update Task Header Fields

Field Label	Description
Task Type	The category of the task, such as Diagnostic, Dispatch, or Callback.
Task Status	The phase of the task, such as Assigned, Accepted, Approved, Canceled, or Working.
Priority	The urgency of the task, such as high, medium, or low.
Assignment Status	The assignment status for the task, such as Assigned, Accepted, Canceled, or Working.
Escalation	The escalation level of the task.
Planned Effort	The estimated time required to complete the task.

Update Task: Show Service Request Region

The details of the service request associated with the task can be viewed and updated. To view the details, click the +/- button to the left of the Show Service Request heading.

Once expanded, the following information can be viewed:

• Service request number (link)

• Severity

- Customer Name

- Incident Address

- Contact Name

- Communication

- Item (link)

- Item Description

- Problem Summary

- Resolution Summary

- Problem (problem code)

- Resolution (resolution code)

- Attachments

- Status

- Type

- Purchase Order Number

- Serial Number

- Service Tag

- Contract Number

- Contract Service

- Service Description

At the time the service request is created, the problem code is selected from a list of predefined lookups. Similarly, the resolution code is selected from a list of values at the time the task is completed at the customer site. At any time, the technician can modify problem code, resolution code, and enter resolution summary information detailing the issue addressed at the customer site.

The Pro forma invoice displays information only after debrief lines have been sent to Charges for posting. Click Pro Forma Invoice to view the detail report of charges entered for the task performed.

Update Task: Tabs

Within the Update Task page, there are several sub tabs and expandable sections that the technician can view and update. The following sections describe the sub tabs and associated actions available to the technician:

Update Task: Details Tab

- View and add a description associated with the task.

- View existing notes and create new notes for the task.

- View planned and scheduled start and end dates.

- View owner and assignee for a task.

Update Task: Details Fields

Field Label	Description
Description	This field displays the description for the task.

For a step-by-step procedure for updating task details, see Updating Task Details and Notes, page 9-20.

Update Task: Parts Tab

The user can invoke the parts sub tab either by clicking the Parts icon on the Field Service Technician Dashboard or by navigating to the Update Task page, and then selecting the Parts sub tab.

> **Note:** The parts icon is available on the Dashboard only for those tasks for which parts are required to complete the job at the customer site.

The parts tab displays information such as requirement number, required quantity, destination organization, destination sub-inventory, need by date, arrival date, and source organization.

Using the Parts sub tab you can create a parts order for a task and receive parts. See Ordering Parts for a Specific Task, page 8-24.

Update Task: Debrief Tab

The Field Service technician has the ability to capture travel time, labor time, materials

used to perform the job at the customer site, and expenses incurred during the task assignment.

For more information on entering debrief information, see Understanding Debrief Procedures, page 9-1.

Update Task: Debrief Fields

Field Label	Description
Travel Distance	(Optional) Enabled by a profile option, this field captures distance traveled between task assignments.
Travel Start Time	(Optional) This field can be enabled at the profile option level and allows the user to track the time traveled between task assignments.
Travel End Time	(Optional) Enabled by a profile option, this field tracks the time traveled between task assignments.

Create a Service Request

To restrict technicians from creating a new service request only in context of an open task, set the CSF: Restrict Service Request Creation to Scheduled Site profile to Yes at the responsibility level. Then, on the Update Task page, click the Create Service Request button.

You can create a service request for an open task only from the Update Task page. If creating a service request is not restricted, you can create a new request from the technician dashboard. For more information, see Creating Service Requests, page 8-29.

Updating Task Assignment Status

Use this procedure to update the Task Assignment Status and send information to Oracle Inventory, Install Base, and Charges.

Prerequisites

❐ A service request and task to report on exist.

❐ Status transition engine must be set up for tasks.

Updating Task Assignment Status Using the Summary Table:

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. From the Field Service Technician Dashboard main window, locate the task you want to work with.

3. In the Assignment Status column select an Assignment Status you want to update the task to.

   With service requests created against a product that has an associated counter, upon completion of the task assignment, debrief generates an alert reminder to the technician that the product has a counter. Debrief generates this alert when a task assignment is changed to *Completed* or *Closed.*

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

   > **Note:** For more information about Task Assignment Status, see Task Status and Task Assignment Status Flow, page 1-13.

4. Click Save.

   If the concurrent program CSF: Update Debrief Lines is enabled, the concurrent program sends information to Inventory, Install Base, and Charges only if the task status has one of the following statuses enabled in the Tasks Status setup window:

   - Completed

   - Closed

   - Canceled

   - On Hold

   - Rejected

5. (Optional) You can run the Update Debrief Lines program manually by specifying the debrief number.

   The debrief status can have the following values:

   - Complete: Indicates the debrief lines have been sent to Inventory, Install Base, and Charges successfully.

   - Running: Indicates the concurrent program is still running.

   - Pending: Indicates the concurrent program is still running.

   - Completed with errors: The concurrent program completed with error. Error information can be viewed in the error column for debrief lines.

6. Verify the information by logging into Inventory, Install Base, and Charges to view the processed information.

Updating Task Assignment Status Using the Update Task Page:

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. From the Field Service Technician Dashboard main window, locate the task you want to work with.

3. Access the Update Task page by clicking one of the following:

   • Update Task icon

   • Parts icon

   • Debrief icon

   The Update Task page appears displaying the specified sub tab.

4. In the Show Service Request section select a new Assignment Status.

5. Click Apply.

   If the concurrent program CSF: Update Debrief Lines is enabled, the concurrent program sends information to Inventory, Install Base, and Charges only if the task status has one of the following statuses enabled in the Tasks Status setup window:

   • Completed

   • Closed

   • Canceled

   • On Hold

   • Rejected

Accepting or Rejecting Tasks

A technician can change the Shipping Method or the Ship To Address before accepting a task. The CSP: Initial Status of Internal Order profile option must have the value as Entered to enable the technician to review the order and change either the Ship To Address or the Shipping Method. After changing the Ship To Address or the Shipping Method, the technician can accept the task and the status of the order is automatically changed to Booked.

Use this procedure to accept or reject assigned work.

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

   The Field Service Technician Dashboard for the logged in technician appears to the view designated as the default view.

2. Select a view that displays tasks having the Task Assignment Status filter set to Assigned.

   All tasks assigned to the technician appear in the dashboard.

3. To accept a task, select the seeded value: *Accepted* from the Assignment Status list of values, or select any custom status that has the Accepted check box selected on the Task and Escalation Status window. Click Save.

4. To reject a task, select the seeded value: *Rejected* from the Assignment Status list of values, or select any custom status that has the Rejected check box selected on the Task and Escalation Status window. Click Save.

Field Service Task Assignment Alerts Workflow

Oracle Field Service leverages Oracle Workflow to send task related notifications to technicians. You can use the predefined task notifications or define additional notifications to meet your business requirements. The predefined notifications are as follows:

- New task assignment

- Task reassignment

- Task assignment cancellation

- Task rescheduling

The notifications are in different formats such as, email, fax, or Short Message Service (SMS). These notifications provide the technician with all the details associated with the task.

> **Note:** The process that converts a message to SMS is handled by third party software.

You need to perform some steps to set up the notifications functionality, then the system will begin to send notifications related to tasks.

Follow this procedure to set up the notifications process:

Prerequisites

❑ Oracle Workflow has been setup and implemented

❑ Field Service Alerts and Notifications is setup

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 synchronization 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: Access Preferences SSWA, Preferences link, then in the Notifications section of the page, select an appropriate value from the Email Style list.

4. Define the following profile options associated with this functionality:

   • CSF: Default Accepted Task Status: The system will change the task assignment status to this status when you select the **Accept** option from the notification.

   • CSF: Default Rejected Task Status: The system will change the task assignment status to this status when you select the **Reject** option from the notification.

   • CSF: Alert Send Preference: The system uses this profile option to calculate the send date for the notification. The values for this profile option are as follows:

     • 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, 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 an 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 the **Field Service Task Assignment Alerts** Item Type from the Oracle Application Manager Workflow Manager. Set the concurrent program to run on a periodic basis.

   Navigation: Log in as a system administrator. Click Workflow Administrator, Vision Enterprises, Oracle Applications Manager, Workflow Manager, and then from the Submit Request For list select the Background Engines value.

   For more information on Oracle Workflow, see the *Oracle Workflow Administrator's Guide* and *Oracle Workflow User's Guide*.

Ordering Parts for Trunk Stock

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

- Purchase Requisition

- Internal Order

- Reservation

Use this procedure to create a parts order for trunk stock sub-inventory:

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

   The Field Service Technician Dashboard appears.

2. From the Quick Links section, click the Create Parts Order link.

   The Create Parts Order: Destination page appears. A temporary Parts Requirement number is automatically created for the order. This Parts Requirement number is saved when you click Finish to complete the transaction. See Step 14.

3. Verify the Address.

4. Confirm the Destination Sub-inventory is correct. If it is not correct, select the correct sub-inventory from the list of values.

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

6. Click Next.

   The Create Parts Order: Parts page appears. This page displays all the information you have already added to the parts order in a display-only mode.

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

   The UOM appears by default after the item is selected.

8. Enter the Required Quantity.

9. (Optional) Enter the Ship Set value.

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

10. Click Next.

    The Create Parts Order: Options page appears and displays the various options available to you to create the parts requirement.

11. Select the sourcing options for the parts order.

    This chart details the fields and their respective definitions during this step:

Create Parts Order Field Definitions

Field Name	Definition
Required Item	This field displays all Inventory items that can be used to create the parts requirement.
Required Quantity	This field indicates the quantity required to create the parts requirement.
Supplied Item	If the required quantity for the item is not available, then the system checks for alternate parts like substitutes or superseded items based on the item setups and sourcing rule. If alternate items are available, then the order is created for them instead of the required item.
Item Type	The field indicates whether the supplied item is a substitute or superseded item.
Available Quantity	This field displays the available quantity of the required item in the source organization based on the sourcing rule.
Source Type	This field indicates whether the order source is an outside vendor or an internal warehouse/inventory.
Source	This field refers to the source organization for internal orders and reservations, or the field is blank in the case of a purchase order.
Order Qty	This field indicates the quantity for the order by source type and source.
Shipping Method	Based on the delivery times and shipping methods set up, this field populates with the shipping method to be used to ship the order.
Arrival Date	Based on the lead times of shipping method and the order date, this field populates with the arrival date for the shipment.

12. Enter the Order Quantity for the sourcing option you want to use for the parts order.

13. Click Finish to complete the transaction.

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

14. (Optional) Print the order results by clicking Printable Page.

15. Click OK to return back to the Field Service Technician Dashboard.

Ordering Parts for a Specific Task

Use this procedure to order a specific part for a task:

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

The Field Service Technician Dashboard appears.

2. From the Dashboard, click the Update Task icon for a task.

3. Select the Parts sub tab.

4. Click Create Parts Order.

The Create Parts Order: Destination page appears.

The service request number and task number fields appear by default from the task you selected.

5. Verify and Address and Destination Subinventory.

6. Enter the Need By Date.

7. Click Next.

The Create Parts Order: Parts page appears.

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

The UOM (unit of measure) appears by default after the item is selected.

9. Enter the Required Quantity.

10. (Optional) Enter the Ship Set value.

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

11. Click Next.

The Create Parts Order: Options page appears and displays the various options available to you to create the parts requirement.

12. Enter the Order Quantity for the sourcing options for the parts order.

The following chart details the fields and their respective definitions during this step:

Create Parts Order Field Definitions

Field Name	Definition
Required Item	This field displays all Inventory items that can be used to create the parts requirement.
Required Quantity	This field indicates the quantity required to create the parts requirement.
Supplied Item	If the required quantity for the item is not available, then the system checks for alternate parts like substitutes or superseded items based on the item setups and sourcing rule. If alternate items are available, then the order is created for them instead of the required item.
Item Type	The field indicates whether the supplied item is a substitute or superseded item
Available Quantity	This field displays the available quantity of the required item in the source organization based on the sourcing rule.
Source Type	This field indicates whether the order source is an outside vendor or an internal warehouse/inventory.
Source	This field refers to the source organization for internal orders and reservations, or the field is blank in the case of a purchase order.
Order Qty	This field indicates the quantity for the order by source type and source.
Shipping Method	Based on the delivery times and shipping methods that are set up, this field populates with the shipping method to be used to ship the order.
Arrival Date	Based on the lead times of shipping method and the order date, this field populates with the arrival date for the shipment.

13. Enter the Order Quantity for the sourcing option you want to use for the parts order.

14. Click Finish to complete the transaction.

Managing Trunk Stock

Using the Trunk Stock Management functionality you can:

- View the inventory balances for any sub-inventory associated with the technician.

- View reservation details for the existing reservations for an inventory location.

- View transaction history details for a item and sub-inventory.

Viewing Inventory Balances for a Subinventory

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. From the Quick Links section, click Trunk Stock Management.

   The Trunk Stock Management page appears.

3. Select the search criteria and click Go.

   Search criteria are:

   - Subinventory Code

     Only subinventories associated with the technician appear for selection.

   - Item Number

   - Item Description

   The results table displays the items and their inventory balances within the subinventory that match the search criteria. You can view the Onhand Quantity and Available Quantity for each item in the subinventory.

4. (Optional) Click the Show link next to a subinventory and item.

   The section expands displaying the serial number details for the item.

Viewing Reservation and Transaction History Details

5. In the Trunk Stock Management page, click the Reservation/History icon for an item in the results table.

   The Reservation and Transaction History Details page appears displaying all the existing reservations and transaction history details for the item.

   In the Reservation Details section of the page you can view for each reservation the Reservation ID, Service Request, Task Number, Task Name, Scheduled Start Date, and Customer.

In the Transaction History Details section of the page you can view for each transaction the Transaction Date, Serial Number (if applicable), Transaction Type, Quantity, UOM, Task Number, and Shipment Number.

6. Click the Back to Trunk Stock Management link at the bottom of the page to return to the Trunk Stock Management page.

Transferring Parts

7. In the Trunk Stock Management page, click the Transfer icon for an item in the results table. The Parts Transfer page appears displaying all the source and destination details for the item.

   In the Source section of the page, for each item, you can view the following fields: Resource, Organization Subinventory, Item Number, Description, Revision, Locator, and Date.

   In the Destination section of the page, for each item, you can view the following fields: Resource, Destination Organization, Destination Subinventory, Serial Number, Quantity, UOM, Locator, Lot, and Reason.

8. Click the Save button to return to the Trunk Stock Management page.

Receiving Shipments

The Oracle Field Service Technician Portal receive shipments functionality supports receiving and delivering a shipment to a destination sub-inventory in one transaction. This transaction receives the "as shipped" quantity to a default destination sub-inventory. The technician can update a shipment to receive it into a different sub-inventory.

The Receive Shipments page lists all shipments from a supplier for a given purchase order. The corresponding Carrier, Shipment Number, Waybill, and Packing Slip number display.

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

   The Field Service Technician Dashboard appears.

2. From the Quick Links section, click the Receive Shipments link.

   The Receive Shipments page appears. The table displays incoming orders and includes pertinent information associated to the orders such as Order Type, Vendor Number, PO Number, Shipment Number, Shipped Date, Expected Receipt Date, Waybill Number, and Freight Carrier.

3. Click the Receive icon in the Receive column for the order you want to receive.

The Shipment Details page appears. This page displays the item number and description of the item along with other details associated with the order.

4. To receive the shipment, select the Select option next to the item.

5. In the Quantity field, verify that the number displayed is consistent with the quantity of the item you want to receive. You can edit this number to reflect the actual quantity received.

6. Verify that the sub-inventory into which you are receiving the order is correct. If it is not, change this field to reflect the correct sub-inventory.

7. Click Apply to receive the shipment.

   You can receive parts from the Parts subtab on the Update Task page. Click the Receive button to display the Inbound Orders and Reservation page that contains details about the document number, type, task, source, destination, and status.

Starting Work

Use this procedure to change the task assignment status to indicate that work has begun on a task. When a task is at the *Working* status, reporting on the task is enabled.

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

   The Field Service Technician Dashboard for the logged in technician appears to the view designated as the default view.

2. Access the task you are going to work on.

3. In the row for the task, open the list of values in the Assignment Status column. Select the seeded value: Working from the Assignment Status list of values, or select any custom status that has the Working check box selected on the Task and Escalation Status window.

4. Click Save.

Viewing Service Request Details

Use this procedure to view service request details:

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. Locate the task you want to view the service request details for.

3. In the Service Request column of the dashboard, click the Service Request number link, which will take you to the Service Request Summary page.

4. From there, you can view service request details such as status, customer profile, incident address, related service requests, attachments, and notes.

Viewing Parts Requirements

Tasks having associated spare parts display an icon in the Parts column of the Field Service Technician Dashboard main page. Use this procedure to view parts requirements for a specified task. To create parts requirements, see Ordering Parts for a Specific Task, page 8-24.

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

   The Field Service Technician Dashboard appears to the default view.

2. Select a view that displays the parts column. For information about personalized views, see Customizing Dashboard Views, page 8-6.

3. From the dashboard, click the Parts icon in the row for the task that you want to view the associated service parts.

   • The Update Task page appears to the Parts sub tab. Under the Parts sub tab all the parts requirement for the task display.

   • Click the Details show link to view all the detail information for the parts requirement.

Creating Service Requests

If you set the CSF: Restrict Service Request Creation to Scheduled Site profile to No at the responsibility level, Field Service technicians can create a new service request from the dashboard using the Create Service Request region. The Create Service Request page includes regions for contact information, product information, problem description, and service information.

For more information about logging a service request, see the *Oracle TeleService User Guide*.

Use this procedure to create a service request from the technician dashboard. To create a new service request only in the context of an open task, see Create a Service Request, page 8-16.

Prerequisites

❐ Oracle TeleService must be installed.

Steps:

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. From the Create Service Request region in the dashboard main page, select a Service Identifier from the list of values in the Search Key field.

   Some examples of possible identifiers are customer name, instance serial number, service request number, instance service tag, and so on.

3. Enter a Value for the search identifier.

   If you do not know the complete value, enter a partial value followed by a wildcard character (%), and then use the search functionality to locate the value.

4. Click Go.

   The Create Service Request page appears and displays key information such as the service identifier and related values.

Contact Information

The Contact Information region provides the following fields:

- Contact Type

- Name

- Contact By

- Account

- Time zone

- Current time

- Language

5. To enter information for a new contact person, in the Contact Information region, click Create Contact.

   The Create Contact page appears.

6. Complete the provided fields with available information about the new contact person such as name, job title, location and e-mail addresses, telephone and mobile telephone numbers, and tax ID information.

7. Click Apply.

8. To update Contact Information for an existing Contact person, use the Name field to search for and retrieve the existing contact data.

   The fields populate with the existing information for the contact and an Update Contact button appears.

9. Click Update Contact.

   The Party Information page appears.

10. Update the contact information.

11. Click Save, and then click Apply to return to the Create Service Request page.

Product Information

12. To log Product Information, enter values for the applicable fields in the following list:

    - Category

    - Item

    - Item Description

    - Item Instance

    - Revision

    - Component

    - Revision

    - Sub-Component

    - Revision

    - Lot number

    - Serial number

13. To create a new instance, click Create Instance.

    The Create Item Instance page appears.

14. Complete the required and applicable fields in the Item, Instance Specific Attributes, Owner, Current Location, Install Location, Other, and Flex Field regions.

15. Click Apply to return to the Create Service Request page.

Update Instance and Change Owner buttons appear in the Product Information region of the Create Service Request page.

Problem Description

16. In the Problem Description region, enter a Summary for the service request.

17. (Optional) Enter notes.

Issues

18. In the Issues region, select a Request Type from the list of values. For example, Field Service.

19. Select a Status, such as Open, or Working.

20. Select the Internal Severity level of the service request.

21. (Optional) Provide information such as Problem Type, Customer's Urgency, Error Message (text), Help desk Number, and Project number.

The system date appears by default in the Incident Date field, but the date can be changed.

22. Select the assignment strategy for the Service Request by selecting the appropriate option. The options are:

- Automatically Assign

  This option invokes the Assignment Manager that returns back the following resources:

  - Winning resources from Territory Manager.

  - Preferred resources from Installed Base.

  - Preferred resources from Contracts.

  If there are multiple resources found, the first resource is assigned to the service request.

- Assign to my Group

  With this option the service request assignment is done only at the Group Level. The application determines the Resource Group that the agent (one who is logged into the application) belongs to and assigns the service request to that group. If the agent belongs to multiple groups, the application assigns the service request to the first group that is returned from the system.

- Assign to me and my Group

  With this option the service request assignment is done at both the individual and group level. The service request individual owner is the agent who is logged into the application. The group owner logic is the same as the Assign to my Group option.

The group is defined by the profile option Service: Default Group Owner for Service Requests. This profile is mandatory if you want to perform manual assignment such as, *Assign to me and my Group*.

Contractual Coverage
23. If there is contractual coverage associated with the service request, enter values for the following fields: Contract, Expected Response Date, and Expected Resolution Date.

Incident Address
24. Enter the incident address for the service request.

    Retrieve an existing address or enter a new address. In the Select field select Existing Address or New Address.

Shipping Information
25. In the Shipping Information region, verify existing values, or select from the list of values for the following fields: Customer, Contact, Account, and Address.

26. To create a new address, click Create Address.

    The Create Address page appears.

27. Enter address information.

28. In the Address Purposes region, select Ship To from the Purpose list of values.

29. Click Apply.

30. To update an address, click Update Address.

    The Update Address page appears.

31. Update the address information.

32. In the Address Purposes region, verify that the Ship To purpose is listed. If that purpose is not listed, click Add Another Row, and then select Ship To from the list of values for the new row.

33. Click Apply.

Create Service Request

34. To create the service request, click Apply.

35. To create a new service request and immediately create a task for this new service request, click Apply and Create Task.

36. After successfully creating a service request and task, you can then schedule the task from the Technician Dashboard.

9

Debriefing Work Completion

This chapter covers the following topics:

- Understanding Debrief Procedures
- Understanding Return Routing Procedures

Understanding Debrief Procedures

A technician accesses Debrief by clicking the Debrief icon on the Field Service Technician Dashboard, or by clicking the Update Tasks icon on the dashboard and then clicking the Debrief tab.

This action brings up the Update Task page to the Debrief sub tab, where the technicians can view or create new labor, material, and expense lines. Enter the required information and then click Apply to commit these details and click Add Another Row to create additional debrief lines. After creating these debriefs, you can update or delete them as long as they have not been submitted to charges.

Oracle Field Service enables the following debrief procedures. You can use the Field Service Technician Portal, the Field Service Administrator Portal and the Field Service Third Party Technician and Administrator Portals to perform these debrief procedures.

- Scheduling and Rescheduling Tasks, page 9-2

- Capture Travel Information, page 9-6

- Add a Labor Line, page 9-7

- Add a Material Line, page 9-10

- Add an Expense Line, page 9-17

- Record Counter Readings, page 9-19

- Update Task Details and Notes, page 9-20

• Create a Follow-Up Task, page 9-4

Scheduling and Rescheduling Tasks

Using Advanced Scheduler functionality, you can reschedule existing tasks that already display in the Field Service Technician Dashboard and you can schedule follow up tasks that you create in the Create Follow Up Task page.

You can schedule any task that has a status that has been defined as *Schedulable.* When you define the task statuses you indicate whether that specific task status is schedulable or not. If you try to schedule a task that contains a status that is not schedulable the system will display a message stating that the task cannot be scheduled. For information on defining task statuses, see Confirming Setup of Tasks in the *Oracle Field Service Implementation Guide.*

Scheduling an Existing Task

The Schedule Task page can be accessed from the Field Service Technician Dashboard using these methods:

• Click the Schedule icon for a task in the dashboard of the main Field Service Technician Dashboard page.

• Click the Schedule button on the Update Task page.

• Click the Save and Schedule button on the Create Follow Up Task page.

  For more information on scheduling a follow up task, see Creating and Scheduling Follow Up Tasks, page 9-4.

Before you can use the scheduling functionality in the Field Service Technician Dashboard you will need to:

• Install and set up the Advanced Scheduler.

  For more information on the Advanced Scheduler, see Overview of Advanced Scheduler, *Oracle Advanced Scheduler User Guide*.

• Set up these profile options:

  • CSFW: Technicians Schedulable Options

Profile Meaning	Access for User
No Scheduling Permission	No scheduling options for user.
Work On It	User is able to self assign tasks.

Profile Meaning	Access for User
Self Schedule	User is able to schedule tasks using self schedule and intelligent options.
Window to Promise	User is able to schedule tasks using self schedule, intelligent and window to promise (WTP) options.

- Maximum no. of Plan Options

  This parameter value further restricts the maximum number of plan options to display for the results section in the Schedule Task page.

For more information on these profile options, see the Profile Options Appendix in the *Oracle Field Service Implementation Guide* and the Task Scheduling and Assignment section in the Implementing Mobile Field Service - Wireless chapter in the *Oracle Mobile Field Service Implementation Guide.*

Prerequisites

- Oracle Advanced Scheduler is installed and set up.

- Profile options CSFW: Technicians Schedulable Options and Maximum no. of Plan Options parameter are set.

- An existing service request and task must be assigned to the technician.

Steps

1. Navigate to the Schedule Task page, page A-2 from the Field Service Technician Dashboard.

   The Schedule Task page appears.

2. Select the Scheduler Option and click Go. Options are:

   - Intelligent

   - Self Schedule

   - Window To Promise

   The Scheduler API is called and displays in the Result table all the plan options for the resources that meet the scheduling option. The number of options that display are further restricted by the Maximum no. of Plan Options parameter.

   If you selected Intelligent, all plan options for all available resources will be

displayed with resource name and the Schedule Start Date and Time and the Schedule End Date and Time.

If you selected Self Schedule, all plan options will be displayed for the existing technician with Schedule Start Date and Time and the Schedule End Date and Time. The Resource name does not appear for this selection.

If you selected Window To Promise, all plan options will be displayed in the various window options.

3. Select the option next to the plan option and click Schedule or click the Quick Select icon for the plan option.

The Update Task page appears with a confirmation message that the task was scheduled successfully.

In addition, if the technician schedules a task to another technician (Intelligent or Window to Promise), the system will change the Assignment Status for the task for the scheduling technician to *Cancelled.*

Scheduling a Follow Up Task

Field Service technicians can create and schedule follow up tasks from the Update Task page.

Use this procedure to create and schedule a follow up task.

Prerequisites

• A task must be assigned to the technician.

• If you want to schedule the follow up task, Advanced Scheduler must be installed and these profile options need to be set up:

  • CSFW: Technicians Schedulable Options

    Select the Self Schedule or Window to Promise value.

  • Maximum no. of Plan Options parameter.

For more information on the Advanced Scheduler, see Overview of Advanced Scheduler, *Oracle Advanced Scheduler User Guide*.

For more information on these profile options, see the Profile Options Appendix in the *Oracle Field Service Implementation Guide* and the Task Scheduling and Assignment section in the Implementing Mobile Field Service - Wireless chapter in the *Oracle Mobile Field Service Implementation Guide.*

Steps

1. Navigate to the Update Task page, page A-2.

2. From the Update Task page, click Create Follow Up Task.

   The Create Follow Up Task page appears.

   For field definitions see the table: Update Task Field Definitions, page 8-13

3. Enter a Subject for the task.

4. Select a task assignment Status such as, Assigned or In Planning.

5. Select the Type of task from the list of values, such as Diagnostic, Dispatch, or Callback.

6. Select a Priority level for the task, such as high, medium, or low.

7. Enter Planned Start Time and Planned End Time.

8. Enter the estimated time for the task in the Planned Effort fields.

   Enter a numeric value in the free text field and then choose a qualifier from the list of values, such as minutes, hours, or days.

9. Enter a Description of the task.

10. (Optional) To add a note, choose a Note Type from the list of values.

11. Choose a Visibility level from the list of values.

12. Enter the note in the text box.

13. **To Save the Task Without Using the Scheduling Functionality**

    1. Click Apply.

       The Update Task page appears with a confirmation message stating that the task was successfully created in the upper portion of the page. This message also displays the task number that was created.

       The task is saved without a task assignee. The dispatcher can query this task and assign it using the scheduling functionality.

14. **To Save and Schedule the Task**

    - Click Save and Schedule.

      The Schedule Task page appears. At the top of the page is confirmation message stating that the task was created successfully. This message also displays the task number that was created.

      Plus, the Scheduler Options will appear that are associated with profile option CSFW: Technicians Schedulable Options. If you selected Self Schedule for the

profile value then Self Schedule and Intelligent will appear as Scheduler Options. If you select Window to Promise as the profile value, then Intelligent, Self Schedule, and Window to Promise options will appear as Scheduler Options. If you select No Scheduling Permission or Work On It as the profile value then you will not be able to schedule the task using the Scheduler API. The Save and Schedule button will not appear on the page.

15. Select the Scheduler Option and click Go. Options are:

    • Intelligent

    • Self Schedule

    • Window To Promise

    The Scheduler API is called and displays in the Result table all the plan options for the resource that meet the scheduling option. The number of options that display are further restricted by the Maximum no. of Plan Options parameter.

    If you selected Intelligent, all plan options will be displayed with resource name and the Schedule Start Date and Time and the Schedule End Date and Time.

    If you selected Self Schedule, all plan options will be displayed for the existing technician with Schedule Start Date and Time and the Schedule End Date and Time. The Resource name does not appear for this selection.

    If you selected Window To Promise, all plan options will be displayed in the various window options.

16. Select the Select option next to the plan option for the resource and click Schedule or click the Quick Select icon for the plan option.

    The Update Task page appears again with a confirmation message that the task was scheduled successfully.

Capturing Travel Information

The Field Service Technician Portal enables capture of travel related information for technicians individual task assignments.

You enable this feature by setting the CSF: Capture Travel Information profile option.

This profile can be set with one of these values:

• None

• Time

• Distance

- Time and Distance

The Update Task page, Debrief sub tab displays fields relating to the profile option value selected. For example, if the profile option is set to 'Time', then the page displays the start and end time fields, but not the distance field.

The fields rendered for capturing travel time are not mandatory. This means, for example, that even though the profile is set to 'Time', the user is not required to enter the start and end time, even though these fields display on the page.

Use this procedure to enter travel time and distance.

Steps

1. Navigate to the Field Service Technician Dashboard, page A-2.

   The dashboard appears to the selected default view.

2. In the row for the task to be debriefed, click the Debrief icon.

   The Update Task page appears displaying the Debrief sub tab.

3. (Optional) In the header region of the Debrief sub tab, enter the Travel Distance, Travel Start Time, and Travel End Time.

   > **Note:** Based on the value you set for the CSF:Default Labor Debrief Date/Time profile, the travel start and end times are populated.

4. If you set a value for the CSF: Default Service Activity Code for Travel profile, this becomes the default travel service activity code.

5. Click Apply.

Adding a Labor Line

Use Debrief labor line functionality to record time spent on a task.

You can create multiple labor lines for a task assignment. Labor lines are uploaded to Charges when the CSF: Update Debrief Lines concurrent program completes successfully. The technician cannot modify labor lines after they have been submitted to Charges. Technicians can however, still add new labor lines for the task as long as the task assignment status is not 'Closed'.

For more information about Task Assignment Status, see Task Status and Task Assignment Status Flow, page 1-13.

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

> **Note:** While creating error correction debrief labor lines, the above mentioned profile option is ignored.

Use this procedure to add a debrief labor line to a task:

Steps

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. From the Dashboard, click the Debrief icon for the task for which you want to add debrief lines.

   The Update Task page appears displaying the Debrief sub tab.

3. Click the "+" icon to expand the labor region.

4. In the Labor region, click Add Another Row.

   This expands the Labor region, where the technician can enter information to create a labor line. Existing labor lines associated with this task assignment appear in the summary table of the labor region.

5. In a new labor line, if you set a value for the CSF: Default Service Activity Code for Labor profile, this becomes the default labor service activity code. For more information, see the *Oracle Field Service Implementation Guide*.

   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.

6. Based on your setting for the CSF: Default Labor Debrief Date/Time profile, the start and end times appear by default in the Start Time and End Time fields. The technician can modify the start and end times.

   • The start date and time must be greater than the earlier of the incident report date and time or the service request creation date and time.

   • The start date and time must be less than or equal to the system date.

7. (Optional) Override the time spent working in the Duration field.

   The end time recalculates according to the start time plus the duration time.

8. The planned effort unit of measure for the task appears by default in the UOM field. The technician can choose a different unit of measure from the list of values.

9. (Optional) Enter an item that the labor line is being logged against, if applicable.

   The Item Description appears.

10. Specify the project details. You can view information about the labor line for the project. The project information on the labor line is displayed based on the setting in the Service: Default Project Information from Service Request profile. If the profile is set to Yes, project related values saved in the service request information are displayed, by default in the project related fields on the debrief labor line. You can modify the default values.

   The project related fields are hidden out of the box and can be displayed on personalization.

   • 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.

11. (Optional) Enter a Reason for the labor line.

12. The schedule start date appears by default in the Service Date field. The technician can select a different date.

      • The service date and time must be greater than the earlier of the incident report date and time or the service request creation date and time.

      • The service date and time must be less than or equal to the system date.

13. To save the labor line, click Apply.

   For information on correcting labor lines, see Reviewing and Correcting Debrief information, page 10-5.

14. You can also record the time spent on traveling to and from sites and the distance traveled. To enter travel start and end dates, click to expand on the Travel region when entering a labor line. The value you set for the CSF: Default Service Activity Code for Travel profile becomes the default travel service activity code for the travel debrief line. For more information, see the *Oracle Field Service Implementation Guide*.

> **Note:** Enter travel distance when reporting on expenses.

15. Save your work.

Adding a Material Line

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 at the line level, and updates Oracle Inventory, Install Base, and Charges for that specific line.

You can create multiple material lines for a task assignment. The technician cannot modify material lines that have been submitted to Charges. Technicians can however, still add new material lines for the task as long as the task assignment status is not *Closed.*

Replacements need two material transaction lines, one for the part taken out or removed, and one for the part put back in or installed as replacement.

The Material line region of the Update Task: Debrief sub tab area is divided into two parts: Install and Return.

- The Install section is used to capture debrief lines with a line type of *Order* for all transactions where the item is installed at the customer site. If the part ordered was not installed by the technician because there was no need for it or because it was found defective on inspection then the technician enters debrief details for this unused or defective on arrival part in the Material Install section.

- The Return section is used to capture debrief lines with a line type of *Return* for transactions where 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 and needs to be replaced with a new part that the technician has installed, the technician enters the details of the new replacement part in the Material Install section and the details of the worn out part that he removed in the Material Return section. If the technician has an assigned default defective sub-inventory assigned, the item appears by default in that sub-inventory field for return transactions.

Use this procedure to add a Debrief Material line:

Prerequisites

- At least one service request and task to report on exist.

- Resources have sub-inventories assigned to them.

- Setups for the Business Process and Service Activity Code are complete.
  - Profile Option: CSF: Default Business Process

  - Profile Option: CSF: Default Debrief Service Activity Code

- Item setups are complete:
  - The Service Billable attribute is set to *Material.*

  - The Item Transactable check box is selected.

  - In the case of trackable items, the instance numbers are generated.

  - Price lists are associated with the items.

Steps

1. Navigate to Field Service Technician Dashboard, page A-2.

2. From the Field Service Technician Dashboard, click the Debrief icon for the task for which you want to add debrief lines.

   The Update Task page appears displaying the Debrief sub tab.

3. Click the + icon to expand the Material region.

   This action expands the Material region to display two parts: Install and Return.

Reporting Installed Material

You report on installed material in the Material Install region of the Debrief tab. Installed material includes all parts associated with the debrief task that were ordered. The technician may not install all of these ordered parts at the customer or incident site, either because some of them were not required, or because, on inspection, the part seemed to be defective. You can, however, create material debrief lines for these unused and defective on arrival parts in much the same way as you create for the used or installed parts.

1. Click the Assigned Parts button in the Material Install region to create lines for each part ordered for this task.

2. In addition, you can use the Add Another Row to create additional material lines.

While creating a material install debrief line, you can search by the Serial Number, which will automatically display the item details.

If the part was installed, select usage type of Used and then select and enter the following additional debrief attributes.

> **Note:** To select Unused usage type and report on unused parts, set the CSF: Enable Return Routing In Debrief profile to Yes.

1. The Business Process default value appears when the Service Request Type has an associated Business Process.

   If no Business Process is associated, then the Business Process default value is set to the value of the profile option CSF: Default Business Process.

   If no Business Process is associated, and if the profile option CSF: Default Business Process is not set, then the technician must select the Business Process from the list of values.

2. Also select a Service Activity code.

   This is the activity for the material you are reporting. The item you are able to select is filtered based upon the Service Activity code and sub-inventory you select.

   If the profile option CSF: Default Service Activity Code is set with a value that has the Line Type: Order, then that value is the default for this field.

   If the profile option CSF: Default Service Activity Code is not set, then the technician must select the Service Activity code from the list of Service Activity codes that are associated to the Business Process selected in the previous step.

If the part was not installed, select usage type of Unused or DOA whichever is applicable. In these cases, the Business Process and Service Activity Code fields are grayed out. For all installed parts irrespective of their usage, enter the following debrief attributes.

1. The sub-inventory populates with the default usable sub-inventory.

2. 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. In addition to the items that are listed on the page, you will be able to view for each item the Recovered Part Disposition (if applicable), Subinventory, Revision, Onhand Qty, and Available Qty.

   Select the item by one of these methods:

   • Select the select radio button for the item and click Select.

   • Click the Quick Select icon for the item.

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

The list of Items that display depend on the Service Activity code setup:

- If the Update IB check box is checked for the selected Service Activity Code in the IB transactions subtype, then the Item list displays both trackable and non trackable items.

- For an item that is Installed Base trackable and serialized, search for the IB serial number of the item. If the item serial number that you enter is not the same as that in the service request, the system populates the product serial number, the product item number, and the parent product instance in the Material Install region. You can also search for the appropriate parent or recovered instance by item or IB serial number.

    Note: For trackable items that are serially tagged, enter a serial number. The CSF Update Debrief Lines program then creates a new Install Base record during debrief posting and updates the debrief record with the Install Base instance number.

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

   - The UOM field appears by default from the selected item UOM attribute. You can select a different unit of measure from the list of values, if necessary.

   - The Service Date appears by default from the system date and time. The technician can select a Service Date from the date list of values.

     - The service date and time must be greater than the earlier of the incident report date and time or the service request creation date and time.

     - The service date and time must be less than or equal to the system date.

4. Additionally, the operational status of the part or asset instances being installed into another piece of equipment (the parent) automatically inherit the operational status of the parent instance.

   When the part or asset installed is without reference to a parent, in other words, it is a stand alone part or asset, then the technician needs the ability to enter and update its Install Base operational status. The operation status contains these values:

   - Not Used

   - Installed

   - In Service

   - Out of Service

The operational status of the part or asset being installed is updated when the Material Debrief is posted.

5. Enter the quantity for the item installed in the Quantity field.

   In the case of serialized items, Quantity is set equal to 1, and the Quantity field is disabled.

6. (Optional) Select a Reason for the material transaction from the list of values.

7. In addition, you can enter return destination details for unused or defective parts as follows. If you set up Routing Rules in Spares Management for this return type, the default Destination Organization, To Subinventory, and Return Ship to Address fields are populated. You can additionally, enter the carrier, shipment number, and waybill number.

   If Routing Rules are not defined, the technician's default defective subinventory and organization are populated.

8. Specify the project details. You can view information about the labor line for the project. The project information on the labor line is displayed based on the setting in the Service: Default Project Information from Service Request profile. If the profile is set to Yes, project related values saved in the service request information are displayed, by default in the project related fields on the debrief labor line. You can modify the default values.

   The project related fields are hidden out of the box and can be displayed on personalization.

   • 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.

You can validate whether the installed part is the same as the replaced part using the CSF: Validate Part Replacement in Debrief profile option. If the profile option is set to Yes, the validation is enabled at Task Detail level and while posting the debrief line. If the installed item is same as the recovered item, debrief line is posted. If the validation fails, the line is not posted and an error message is displayed. If the profile option is set to No, validation is not enabled at the time of saving the information and posting the debrief line.

Reporting Returned Material

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.

The Material - Return section is similar to the Material - Install section. The Return section includes a Return Reason field, (in addition to the Reason field), which is required to be completed if a return is being processed.

1. In the Material section - Return, click Add Another Row. 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 populates 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.19. 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.

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. Specify the project details. You can view information about the labor line for the project. The project information on the labor line is displayed based on the setting in the Service: Default Project Information from Service Request profile. If the profile is set to Yes, project related values saved in the service request information are displayed, by default in the project related fields on the debrief labor line. You can modify the default values.

    The project related fields are hidden out of the box and can be displayed on personalization.

    - 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.

12. Click Apply.

    The material line is saved.

13. Select a line and click Add Install Line button after saving the return debrief line. This will let you add a line in the Install region.

Using Loaner Transactions

Some field service operations provide temporary parts to a customer in place of a part that must be repaired. There is no change of ownership, as the loaned part is still owned by inventory and not by the customer. Field Service Debrief supports this scenario by capturing equipment usage details of loaner equipment.

Loaner transactions are identified in Debrief based upon the Service Activity code assigned to them. When a technician logs a material line with a Service Activity code that supports a loaner transaction, such as Type 'Loaner', the material line has an enabled Return Date field. The technician enters the expected date that the loaned part should be retrieved from the customer.

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

Prerequisites

- A service request and task to report on.

- The setup for Service Activity Code is complete.

- The item setup is complete and the items have the Service Billable attribute set to 'Material'.

- The Return Required check box in Installed Base Transaction type is enabled to identify the Service Activity Code as a loaner.

- The Change Owner must be cleared and the Change Owner To field must be blank.

Steps

1. The steps to log a material line for a loaner part are the same as those used to log a regular material line. See Adding a Material Line, page 9-10.

Adding an Expense Line

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

Use this procedure to add a debrief expense line:

Prerequisites

- A task having a status that enables reporting expenses.

Steps

1. From the Dashboard, click the Debrief icon in the row for the task for which you want to add debrief lines.

   The Update Task page appears.

2. Click the "+" icon to expand the Expense region.

   Existing expense lines associated with this task assignment appear in the summary table of the expense region.

3. Click Add Another Row.

   This expands the Expense region, where the technician can enter information to create an expense line.

4. Select a Business Process.

   - The Business Process default value appears when the Service Request Type has an associated Business Process.

   - If no Business Process is associated, then the Business Process default value is set to the value of the profile option CSF: Default Business Process.

   - If no Business Process is associated, and if the profile option CSF: Default Business Process is not set, then the technician must select the Business Process from the list of values.

5. Choose an Activity from the list of values associated to the business process selected in the preceding step. This is the activity you are going to perform for the expense you are reporting on.

6. Select the Item for which you are going to create an expense line.

   The Item Description field populates with an extended description for the item. The unit of measure is defaulted after selection.

7. Enter either the Quantity and UOM, or the Amount and Currency. Quantity and Amount are mutually exclusive.

8. Specify the project details. You can view information about the labor line for the project. The project information on the labor line is displayed based on the setting in the Service: Default Project Information from Service Request profile. If the profile is set to Yes, project related values saved in the service request information are displayed, by default in the project related fields on the debrief labor line. You can modify the default values.

   The project related fields are hidden out of the box and can be displayed on personalization.

- 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.

9. The Currency field default value is based on the currency set for the profile option: JTF_PROFILE_DEFAULT_CURRENCY. You can change it, if necessary.

10. Select a Service Date from the date list of values.

    The system date appears by default.

11. (Optional) Choose a Justification for the expense from the list of values.

12. To temporarily save the expense line to your debrief, click Add Another Row.

13. To save this line to the permanent record, click Apply.

    For information on correcting expense lines, see Reviewing and Correcting Debrief Information, page 10-5.

Recording 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.

For Service Requests created against a product that has a counter associated with it, upon completion of the task assignment, debrief generates an alert reminder to the technician that the product has a counter. Debrief generates this alert when the task assignment status is changed to either 'Completed' or 'Closed'.

In the case where a single task has been assigned to multiple resources, the alert

message is displayed as long as the counters have not been updated between the scheduled start time and the system time by any one of the assigned resources.

Use this procedure to capture counter readings.

Prerequisites

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

Steps

1. From the Dashboard main page, click the Debrief icon in the row for the task that you want to add debrief lines.

2. In the Counters region, click the "+" icon to expand the Counters region.

   This displays counters available for the item in the service request.

3. Enter a value for the counter reading.

4. To roll over the counter value, select the Roll over check box.

   Details

   1. Click the Show/Hide link in the Details column.

   2. (Optional) Enter comments for the new reading.

   3. To enter adjustment details for the counter reading, select the adjustment type, and then enter the adjustment value.

   4. To reset the counter reading, enter the reset value.

   5. (Optional) Enter comments for the reset.

   6. To include the target reset, check the Include target check box.

   7. Click Apply.

Updating Task Details and Notes

At any time during the processes of scheduling service requests, assigning tasks, or debriefing, a Field Service technician or call center agent can add a note to a task. A Field Service technician can not only add a note to a task, but can also view notes that have been associated with a service request. This feature enables a consolidated view of a task and all the related notes added during the task life cycle.

The user also has an option to search for additional notes by clicking the Find on the menu, and then specifying search criteria. For example, to search on Install Base notes, enter the source as "installed base", and then click Enter.

Use this procedure to update task details and notes.

Steps

1. From the dashboard, click the Update icon in the row for the task you want to update.

   The Update Task page appears displaying the Details sub-tab.

2. If you want to add or change the description for the task, enter text in the Description text box.

3. To add a note, in the Add Note region select a Note Type from the list of values (for example, Callback, General Note, and so on).

4. Select the Visibility level for the note from the list of values. Options include: Public, Private, or Publish.

5. Enter the text of the note in the Note text box.

6. Click Apply to save your work.

7. To view your note or any other notes attached to the task, expand the Notes History region (click the + sign to the left of heading).

   This expands the note. From there, you can modify the Note Type or Visibility level of the note.

Generating and Signing a Task Report

After entering all the details for the task and completing the debrief action for the task, you can view all the task details in a task report. You can add a signature to the report and generate a PDF (portable document format) for the report.

Steps

1. From the dashboard, click the Update icon in the row for the task you want to generate the report for.

   The Update Task page appears displaying the Details subtab.

2. Select the Debrief subtab.

   You can click the Task Report button to view the service report details and add customer's signature from the report or directly click Sign button from the Debrief subtab.

3. Click Task Report button to display the Report page. On this page you can generate a PDF for the report and add your signature to the report.

You can define the layout of the PDF report by specifying a value for the CSF: Default

Task Report Template profile option. By default this profile option value is Field Service Task Summary Report.

Creating and Reviewing e-Records

Oracle Field Service supports electronic records and approvals so service providers can comply with the US FDA's CFR Part 11 regulation. The basic FDA requirements are to store electronic records of key application transactions, and to retrieve the records during FDA audits. More specifically, CFR Part 11 is the FDA guideline for trustworthy electronic records that requires companies to employ procedures and controls designed to ensure the authenticity, integrity, and where appropriate, the confidentiality of electronic records, and to ensure that the signer cannot readily repudiate the signed record as not genuine. CFR Part 11 applies to the manufacture and service of certain medical devices, such as heart valves and X-Ray machines.

Support for electronic records and approvals is provided in the Administrator and Technician Portals. This entails creation of eRecords and capturing the approvers ID and password. The key application transaction being recorded is task debrief and closure.

When Field Service technicians complete work on medical devices, they report labor, material, and expenses used, and mark the tasks as complete. The next steps are: approving work performed, capturing an electronic signature of the approver, and closing the task.

Stored records can be reviewed by selecting the Search Erecord Evidence Store link within the Quick Links region of the Field Service Technician Portal or the Field Service Administrator Portal.

When enabled, this functionality creates an electronic record at task closure with the following components:

- The Service Request, Task, and Debrief record, known as the Task Closure Record

- The electronic signature of the approver

- Acknowledgement details

- Additional information

- Related E-Records

    - This Task Closure Record, with the approvers signature, can subsequently be recalled from the Oracle Electronic Records and Electronic Signatures (ERES) system.

    - The application supports CFR Part 11 Compliance for Debrief initiated through the Portals.

Process Flow

The process is executed as follows:

- When the debrief begins Labor, Material and Expense debrief details are captured.

- Once these details are captured, the debrief is posted as 'Completed', 'Canceled', 'Closed', or 'Rejected'.

- When the Debrief is posted it invokes the Applications Programming Interface to

raise a business event.

- • If the Business event is not raised, then an error has occurred.

- • If the Business event is raised, then the Service Erecord is created.

- Service Erecord creation evaluates the Approval Management Engine rule.

- When the debrief is approved, capture the approvers ID and password as the electronic signature.

- Signature capture ends this process.

Setup

Setting up this feature in the Field Service Administrator Portal and in the Field Service Technician Portal requires these key setup steps:

- Set profile option EDR: E-records and E-Signatures value to 'Yes'

- Set transaction variables 'eRecord Required' and 'eSignature Required' values to 'Yes'

- Enable the ERES work flow business event

- Enable the ERES work flow business event subscription and set in 'Synchronous' mode

- Define one rule for the Approval Management Engine. When the task assignment status is changed to either 'Completed', 'Rejected', or 'Closed', the approval process succeeds with the approval process showing the list of approvers matching the defined Approval Management Engine rule.

For more information about the Oracle Electronic Records and Electronic Signatures System, see the *Oracle E-Records Implementation Guide*.

Updating Owned Asset Install Base Records

Some field service organizations provide service for assets owned by the organization, as well as customer products. Typical examples include product based assets, such as trade show, demonstration, and training equipment, and dispersed or mobile assets, such as cell towers and mobile MRI vans.

Support for Non Trading Community Party Addresses

To support this requirement, the TeleService Service Request window supports creation of Field Service tasks when the incident addresses are not associated to a party or customer.

Direct Access to Update Install Base Records

The Technician and Administrator Portals provide access to the Install Base page to directly update the Install Base record referenced on the service request for the equipment being serviced. This functionality streamlines owned asset and customer product moves and operational status tracking. You can also record the operational status of parts and equipment being installed or recovered.

Prerequisites

- Service request and task with reference to an instance number of an item must exist.

Steps

1. When an item instance is associated with a service request, an icon displays in the Field Service Technician Dashboard Install Base column. To invoke a view only page of the instance record, click the Install Base icon.

2. To access the Install Base page for recording location changes, updating instance status, or making corrections, click the Update Task icon.

   The Update Task page appears. In the header region of the Update Task page, there are two drop down lists located to the right of the Instance Action field label.

3. To perform an action on the instance associated with the service request, in the first (left) of the two fields, select 'This Instance' from the drop down list of values.

4. From the second (right) drop down menu, select the desired action, such as 'Put into Service', 'Take Out of Service', 'Install', 'Move', or 'Uninstall'.

5. Click Go.

   The Install Base page appears.

6. To update the operational status of instances at this location that are installed or recovered through material debrief, in the first (left) of the two fields, select 'All Instances' from the drop down list of values.

7. Click Go.

8. Search for and select the instance.

9. For an installed instance, select one of the following operational statuses:
   - Installed
   - In Service
   - Out of Service
   - Not Used

10. In the case of recovered instances, the value of the operational status is seeded as: 'Out of Service'.

Understanding Return Routing Procedures

Return routing is all about the utilization of parts installed at customer sites. A field service technician on a task at a customer site may find that one or more parts need replacing. This can be because the life of the part in use is exhausted, or because the part in use is in need of servicing. If the part requires servicing and repair that can happen quickly, the technician may use a loaner replacement part as a stop-gap arrangement and return later to finish the job. For more information on this, see Using Loaner Transactions, page 9-17.

If the part must be replaced, replacement parts can be on hand in the technician subinventory or may need to be routed from a different subinventory or even ordered. On arrival, the technician may not finally use all of the parts requested or may find that some of these parts have manufacturing or shipping defects. The sooner parts that are not used are returned to the supply chain and defective parts repaired and returned to the same chain, the greater the level of their utilization.

Oracle Field Service enables the following return routing procedures. You can use the Field Service Technician Portal, the Field Service Administrator Portal and the Field Service Third Party Technician and Administrator Portals to perform these return routing procedures.

Reverse Logistics and Return Routing Using the Existing Spares Management Functionality

The Parts Assigned button on the Oracle Field Service Technician Portal automatically defaults debrief lines from part requirements on a task. If these parts were not used or could not be used because they were defective on arrival, the technician can move them out of the good subinventory and return these to the defective subinventory. To further execute the returns for these excess or defective parts from the defective subinventory to specified multiple destinations, the technician dashboard provides a link to Spares Management's Parts Return process.

Excess is defined as available parts, which are in excess of maximum (Max) levels. Spares Management uses the Create Excess Lists concurrent program to define excess parts and optionally apply business rules to filter the excess list. For defectives, all available quantity is considered to be excess. Max levels are not applied on defective parts

Routing destinations are defined using the Return Routing Rules setup in Spares Management. The Return Routing module uses business rule parameters that include a source, which is an inventory location, or territory; return type, part category and item. The business rules are used to determine the destinations from any point in the supply chain. It is from anywhere to anywhere approach. This enables repositioning of excess

parts at a higher level in the supply chain and helps facilitate a greater level of utilization.

Using Parts Return, the technician can also send parts that are defective directly to multiple repair suppliers depending on the part and the country. In addition to sending the parts to repair suppliers, the technician can also route the defective parts to other destinations, such as, warranty recovery, defective on installation analysis, and scrap. Through the Repair and Return process, the field service organization owns the parts including the time that the parts are stored at the repair supplier.

This parts return process is often referred to as Reverse Logistics or sending the parts back to the supply chain or to the appropriate destination. For information about returning *excess* and *defective* parts, see Using Parts Return, page 9-27.

Using Parts Return

Return Routing Rules

Spares Management return routing rules are used to display the destination for a parts return task in the Field Service 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.

Spares Management has the capability to return excess parts to multiple destinations. The technician from a defective sub-inventory or a supply chain warehouse can execute the returns. The customer through integration with the Spares Management returns module must supply the return to locations.

Parts return process includes the following steps:

- Run the concurrent program: Create Excess Lists

- Select a source

- Select a destination

- Select the Items and quantity

- Create the return order

The response for the return request defines the destination. The location is defined as either an Inventory Organization or a Sub-inventory Organization.

Steps

1. Navigate to the Field Service Technician Dashboard, page A-2.

2. From the Quick Links section, click the Parts Return link.

   The Parts Return page appears. This page displays the Source, Consolidation, and

Destination Summary associated with the technicians sub-inventories.

3. Click the Destination link. The Parts Return: Destination Details page displays the Source, Destination, and Defective Return items associated with the destination selected.

4. Select the Select check box next to the item that you want to return.

5. Verify that the quantity to be returned is correct. If it is not correct, for example, if you only want to return a portion of the excess, edit this field to reflect the quantity you want to return.

6. Click Return.

    The Parts Return: Create Order window appears. This table displays pertinent information, such as the Source organization, Source sub-inventory, Destination Organization, and Destination Sub Inventory.

7. Click Finish.

    This confirms the transfer and returns you to the Field Service Technician Dashboard.

Directly Processing Assigned Parts when Posting Debrief

Technicians can choose to directly process parts assigned on a task while entering other debrief information, by routing unused and defective on arrival parts to specified destinations, capturing shipping details, and executing these returns when posting the selected debrief lines. The CSF: Update Debrief Lines concurrent program transfers the unused and defective parts from technicians' good subinventories to the specified destinations

After technicians click on the Parts Assigned button in the Material Install region of the Debrief tab, to default all assigned parts into the debrief region, they identify the condition or usage of these parts by selecting used, unused, or defective on arrival. In case of unused or defective on arrival parts, technicians must enter item details and the customer site organization and subinventory. Based on this information, the system defaults the destination organization and subinventory. In addition, for unused or recovered parts, the system displays the installed base serial number of the item, the parent item, and the item instance and parent item instance. After reviewing default routing destinations, the technician can additionally capture shipping information such as shipment number, waybill number, and carrier.

After all debrief details are entered and if no approvals are required, the technician can select these debriefs and post them. For more information, see Manually Posting Debrief.

Viewing Transaction History

The technician or dispatcher can search and view transaction history of parts that are returned to reconcile shipments made by the technician but not received at the destination.

Steps

1. Navigate to the Field Service Technician Dashboard, page A-2.

   The Dashboard appears.

2. From the Quick Links section, click the Transaction History link.

   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.

3. Click the Search button. The Transaction History: Results page displays.

   This page displays the transaction results based on your search parameters, with the following information:

   • From: Subinventory

   • Transaction Type

   • Destination

   • Time

   • Item

   • Quantity

4. Click Finish.

   This returns you to the Field Service Technician Dashboard.

10

Reviewing Debrief and Billing

This chapter covers the following topics:

- Overview: Administrator Portal Dashboard
- Reviewing Debrief by Technician Schedules
- Correcting Debrief by Task
- Automatic Debrief Posting
- Manually Posting Debrief
- Reviewing, Correcting, and Submitting Charges
- Viewing a Pro Forma Invoice

Overview: Administrator Portal Dashboard

The Field Service Support Dashboard is the entry point for administrators or managers to perform multiple functions on behalf of their reporting field technicians. The Field Service Support Dashboard is similar to the Field Service Technician Dashboard. Both of the dashboards function and operate basically the same except with the Field Service Support Dashboard you can query on task-related information for a specific resource. For information on the Field Service Technician Dashboard, see Explaining the Elements of the Field Service Technician Dashboard, page 8-2.

The Field Service Support Dashboard consists of:

- Simple Search (based on service request number, task number, and customer), Advanced Search, and Resource Search, page 10-2 fields

- Quick Links, page 10-2 region

- Create Service Request, page 10-3 region

- Search Knowledge Base, page 10-3 region

• Main View, page 10-3

Resource Search

The manager can search for information related to tasks assigned to a specific resource by selecting a Resource Type, and then providing a complete or partial value in the Resource Name search field. See Querying Technician Schedules, page 10-4.

Quick Links

The Quick Links region provides access to pages where the manager can:

• Create parts orders for a technicians sub-inventory.

• Receive shipments into a technicians sub-inventory.

• Return excess parts from a technicians sub-inventory.

• Return defective parts from a technicians sub-inventory.

• View the calendar for a specific technician.

• Manage trunk stock for a sub-inventory.

Create Service Request

In the Create Service Request region, the manager or administrator can select a service identifier from the Search Key list of values, enter a value, and then launch the Create Service Request page.

Search Knowledge

In the Search Knowledge region, the manager can enter keywords, and then conduct either a Knowledge Search or an Advanced Solution Search.

Main View

In the Main View, managers and administrators can select from the list of seeded views, and can create additional personalized views to display selected columns of information in the desired sequence.

Show/Hide Details

The Details column displays for every seeded and personalized view. After task-related information is retrieved for a specific resource, click the Show link or "+" icon to:

- View the details of the service request associated with a task.

- View the details of a repair order associated with a task, when the task is from a repair order.

Update Icon

An **Update** icon appears in each row. Clicking the Update icon opens the Update Task page to the *Details* tab, where the manager can:

- Update task details.

- Click the **Create Follow-Up Task** button to create and schedule a follow-up task to the current task.

- Schedule a task.

Debrief Icon

A **Debrief** icon appears in each row. Clicking the Debrief icon opens the Update Task page to the *Debrief* tab, where the manager can:

- Update labor, material, expense, and counter readings.

- Compose notes.

- Capture travel time and distance information.

Parts Icon

A **Parts** icon appears in rows for tasks having associated service parts. Clicking the Parts icon opens the Update Task page to the *Parts* tab, where the manager can create a parts order for a specific task.

Schedule Icon

A Schedule icon appears for each row. Clicking the Schedule icon opens the Schedule Task page where the manager can schedule the task.

Pro Forma Invoice Button

After the debrief is completed and posted, view the pro forma invoice, by clicking the Pro Forma Invoice button in the Show Service Request region in the Update Task page. When you click the Pro Forma Invoice button the Service Request Charges Report page appears displaying a summary of charges, estimated charges, submitted charges, and unsubmitted charges.

Supported Features

- Display time in incident time zones.

- Service for owned assets installed at location addresses other than party sites.

- Debrief for Depot Repair order tasks.

- Capture electronic signatures for compliance with CFR part 11 regulations.

Reviewing Debrief by Technician Schedules

Use this procedure to load information about a specific technicians schedule into the Field Service Administrator Portal (Field Service Support Dashboard).

Steps

1. Navigate to the Field Service Support Dashboard, page A-2.

   The Field Service Support Dashboard appears displaying the default view of task-related information.

2. To search for specific task-related information, begin by selecting either Employee Resource or Supplier Contact from the Resource Type list of values. Technicians are usually employee resources of the service organization.

3. Next, provide partial or complete values in the Resource Name field.

- Enter the technicians name in the Resource Name field, or

- Enter part of the technicians name into the Resource Name field, and then click the Tab key.

  The Search and Select: Resource Name page appears displaying names that contain the entered search string. For example, type 'bram' in the Resource Name field, and then press the Tab key. Resource Names: George Abrams, Fred Bramer, and BalasuBramani Jones are retrieved. Click the Quick Select icon in the row for the Resource Name that you want to have return to the Field Service Support Dashboard, or

- If you do not have any partial information for the Resource Name, leave the Resource Name field blank, and then click the Search for Resource Name icon.

  The Search and Select: Resource Name page appears. Click Go. All resource names of the selected resource type are listed. Click the Quick Select icon in the row for the resource name that you want to have return to the Field Service Support Dashboard.

4. To filter the tasks that display, select a view from the View list of values, and then click Go.

   The Dashboard appears with tasks assigned to the selected resource, and that also match the View filter.

   > **Note:** To create a personalized View, click Personalize. See Personalizing the View Display, page 8-7.

   > **Tip:** When selecting columns to display in a personalized view, keep in mind that many details are available by displaying the Details column (Hide/Show).. Therefore you can decrease screen clutter by selecting only the frequently needed information for the personalized view, and then view details as needed.

5. To view details for a task, in the row for a task, click the Show/Hide link in the Details column.

   Details for the task appear below the selected row.

Correcting Debrief by Task

Using the Field Service Administrator Portal or the Field Service Technician Portal (Dashboard) you can review and correct debrief information.

If the debrief information has not been processed yet, the Field Service administrator,

manager, or technician can make a simple data correction to the debrief lines that need correcting. If the debrief information has been processed a few more steps are required by the Field Service administrator, manager, or technician to ensure that the corrected debrief information is handled and posted correctly.

A typical business process flow for debrief correction after the task has been closed may include these steps:

1. The call center will answer the customer call and collect the data (customer number, service request number, task number) for the customer.

2. Field Service administrator or manager will retrieve and display the service request and task number using the Field Service Administrator Portal.

3. Field Service administrator or manager will change the task assignment status to a status that does not have the closed flag enabled.

   Specific transaction status change rules will have been created which enables them to change the task assignment status.

4. Field Service administrator or manager will correct the debrief lines by entering return type transactions and save the changes.

   Return type service activity codes will have been created which will enable them to post return type transactions to the different debrief lines (material, labor, expense and so on).

5. Field Service administrator or manager will change the task assignment status to a status that has the closed flag enabled.

   The task assignment change will initiate the CSF: Update Debrief Lines concurrent program.

Use this procedure to review and correct debrief transaction details previously submitted by Field Service technicians:

See also Understanding Debrief Procedures, page 9-1.

Prerequisites

• Debriefs for one or more tasks have been created.

Correcting Debrief Lines That Have Not Been Processed

1. Navigate to the Field Service Support Dashboard, page A-2.

2. Enter search criteria and click Go.

3. Click the Debrief icon for the task that you want to update.

   The Update Task page appears displaying the Debrief tab.

4. Expand and then update information in the Travel, Labor, Material, Expense, Counters, and Notes regions.

5. Click Apply.

Correcting Debrief Lines That Have Been Processed

1. Navigate to the Field Service Support Dashboard, page A-2.

2. Enter search criteria and click Go.

3. Click the Debrief icon for the task that you want to update.

   The Update Task page appears displaying the Debrief tab.

4. Select the new task Assignment Status from the list of values.

5. Click Apply.

6. Update information in the Travel, Counters, and Notes sections.

7. Click Apply.

Correcting Labor Debrief Lines

This functionality will override the profile option CSF: Allow Overlapping Labor Lines in Debrief.

1. Expand the Labor section.

2. Click Add Another Row.

3. Select a Business Process and a Service Activity code that has been defined with a line category of return.

4. Enter the labor correction line in the same format as the original labor line was entered.

   Enter one of the following:

   - Correct Start Time and End Time.

     The Service Date and Duration are populated by the system.

   - Correct Start Time, End Time, and Item.

     The Service Date and Duration are populated by the system.

   - Correct Item and Duration.

     The Service Date is populated by the system.

5. Enter the Return Reason Code.

6. Click Apply.

   The labor line is saved.

Example of Labor Correction Line

Correcting Material Debrief Lines

Use the following procedure to correct material debrief lines.

1. Expand the Material section.

2. In the Material - Return section, click Add Another Row.

   This expands the Material - Return region, where the administrator can enter information to create a material line.

For a Used Part

1. You enter debrief material lines for additional parts that were installed or a new part that was installed to replace an existing, worn out part at the customer site. If it was a replacement part, then you must review both the debrief material install line for the new replacement part and the debrief material return line for the part that was removed or replaced.

   When correcting debrief for material that was installed and recovered, verify and edit the additional attributes listed below.

   • Check that the business process associated with the service request type is correct.

- Check that the service activity codes for the installed and recovered parts are correct.

For All Assigned Parts

1. To correct debrief for all parts associated with a task irrespective of their usage, verify the following regular debrief attributes for installed material and edit where required.

   - Check that the subinventory is the technician's default usable sub-inventory.

   - Check that details of the item, product item, and recovered item are correct including their instances.

   - Check that the destination organization and subinventory details are as defined by routing rule setup or point to the technician's default defective subinventory.

   - Check the additional shipping details.

   - Check the reasons.

   - After you make your edits, click Apply.

     The material line is saved with the corrected values

Correcting Expense Debrief Lines

Use the following procedure to correct expense debrief lines.

1. Expand the Expense section.

2. Click Add Another Row.

3. Select a Business Process, Service Activity code that has been defined with a line category of return, and Item.

   The Currency, UOM, and Service Date fields are populated by the system.

4. Enter the expense correction line in the same format as the original expense line was entered.

   Enter one of the following:

   - Correct Amount and Currency.

   - Correct Quantity and UOM

5. Enter the Return Reason Code.

6. Click Apply.

The expense line is saved.

Example of Expense Correction Line (Quantity and UOM)

Example of Expense Correction Line (Amount and Currency)

Automatic Debrief Posting

After entering, reviewing, and correcting debrief lines for a task, the technician or the administrator can from their respective portals change the task assignment status to

Completed in order to initiate the CSF: Update Debrief Lines concurrent program.

You can change the Task Assignment Status to any one of the following:

- Rejected

- On Hold

- Completed

- Canceled

- Closed

Changing the task assignment status to one of these values initiates the CSF: Update Debrief Lines concurrent program. The concurrent program CSF: Update Debrief Lines sends debrief line information to Oracle Inventory, Install Base, and Charges. Alternatively, technicians and administrators can directly when entering, reviewing, and correcting debrief, select debrief lines for posting and manually post the debrief information to Oracle Inventory, Install Base, and Charges irrespective of the task assignment status. See next section. Note that charges are not created for parts that were not used or installed.

The Update Debrief Lines concurrent program can have the following values:

- Pending: Indicates the concurrent program is waiting for computing resources.

- Running: Indicates the concurrent program is running but not yet completed.

- Complete: Indicates the debrief lines have been sent to Oracle Inventory, Install Base, and Charges successfully.

- Completed with errors: Indicates the concurrent program encountered at least one error. Error information can be viewed in the error column for the debrief lines.

The concurrent program CSF: Update Debrief Lines sends information to Oracle Inventory, Install Base, and Charges only if the task status has one of the following check boxes selected in theTask and Escalation Status window, page A-2.

- Rejected

- On Hold

- Completed

- Canceled

- Closed

Manually Posting Debrief

Administrators can review and correct debrief lines and directly post their information to Oracle Inventory, Install Base, and Charges without changing the task assignment status from the Debrief tab of the administrator portal. In case the administrator is entering debrief on behalf of a technician in the technician portal, he can directly post these using the Post Debrief button. If the technician directly posts debrief from the technician portal and the posting completes successfully, the technician can no longer make any changes to the debrief lines.

In addition, when the CSF: Update Debrief Lines directly posts debrief information to Oracle Inventory, Install Base, and Charges, if you enabled return routing and set the required routing rules, this concurrent program transfers assigned, unused and defective on arrival parts associated with the task from the technician's good subinventory via the technician's default defective subinventory to the new specified routing location. For more information, see Understanding Return Routing Procedures, page 9-26.

Reviewing, Correcting, and Submitting Charges

Reviewing, correcting, and submitting charges to Order Management for invoicing is accomplished using the Charges tab of the Service Request window.

Use this procedure to review, correct, and submit charges:

Prerequisites

- The CSF: Update Debrief Lines concurrent program completed successfully for at least one labor, material, or expense line.

Steps

1. Navigate to the Service Request window, page A-2.

   The Service Request window appears.

2. Query for the service request you want to work with.

   View > Query By Example > Enter

3. Enter the service request number in the Number field, and then run the query.

   View > Query By Example > Run

   The service request appears on the Service Request window.

4. Select the Charges tab.

Charges information displays for the service request. This screen shot is displaying labor line charges.

5. Select the Pricing tab and verify the charge lines are correct for the service request.

Labor and expense charge lines are created with negative amounts if any corrections were made to these types of debrief transactions. This screen shot is displaying pricing information for labor lines.

6. Review and correct charges information as appropriate.

7. To submit charges to Order Management, click Submit.

Viewing a Pro Forma Invoice

Invoking a Pro Forma Invoice enables adminisrators to review a report that details all the charges entered for the tasks performed at a customer site. The report includes details such as the customers name, bill to address, service request number, item name, quantity, and amount. You can print the report to send hard copy to the customer.

Use this procedure to access the Pro Forma Invoice.

Prerequisites

- A task must be completed.

- For this report to have significance, charges must be entered.

Steps

1. Navigate to the Update Task page, page A-2for a completed task.

2. From the Update Task page, expand the Show Service Request region

3. Click Pro Forma Invoice.

   The Service Request Charges Report page appears. In the header information, this report displays service request information. It also displays charges-related information, such as a summary of the charges and details of the charges, including estimate charges, submitted charges, and non submitted charges.

4. To print this page, use the browser's print functionality.

A

Windows/Pages and Navigation Paths

This appendix covers the following topics:

- Overview of Field Service Windows/Pages and Navigation Paths
- Windows/Pages and Navigator Paths

Overview of Field Service Windows/Pages and Navigation Paths

The following table displays the default navigation path for each Oracle Field Service window or page.

- Text in brackets ([]) indicates a button.

- (I) indicates a icon.

- (T) indicates to select a tab.

- (M) indicates to select the menu option from the window.

To assist with clarification, the responsibility may be listed ahead of the navigation path in the Navigator Menu Path column of the table. For example, Field Service Technician Portal: Field Service Technician Dashboard. In this example, Field Service Technician Portal is the responsibility.

Windows/Pages and Navigator Paths

Oracle Field Service Windows/Pages and Navigation Paths

Window/Page	Navigator Menu Path
Access Hours	• Field Service Dispatcher > Dispatch Center > (M) Navigate > Access Hours • Field Service Dispatcher > Dispatch Center > Right-click on task in Task list > Access Hours • Field Service Dispatcher > Dispatch Center > Plan Board or Gantt view> Right-click on task > Access Hours • Field Service Dispatcher > Service Request > Service Requests > Create Service Requests > (T) Tasks > [Access Hours]
Auto Commit Schedule	Field Service Dispatcher > Field Service Setup > Auto Commit Tasks
Calendar	Field Service Dispatch Center > Plan Board or Gantt views > Right-click on resource name > Calendar
Change Invalid Address	• Field Service Dispatcher > Change Invalid Address • Field Service Dispatcher > Dispatch Center > (M) Tools > Change Invalid Addresses • Field Service Dispatcher > Dispatch Center > Right-click on a task in the Task list > Change Invalid Addresses • Field Service Dispatcher > Dispatch Center > Plan Board or Gantt views > Right-click on a task > Change Invalid Addresses

Window/Page	Navigator Menu Path
Commit Schedule	Field Service Dispatch Center > Plan Board or Gantt views > Right-click on resource name > Commit Schedule
Create Follow-up Task	Field Service Dispatch Center > Plan Board or Gantt views > Right Click on resource name > Create Follow-up Task
Create Personal Task	Field Service Dispatch Center > Plan Board or Gantt views > Right Click on resource name > Create Personal Task
Create Trip	Field Service Dispatch Center > Plan Board or Gantt views > Right-click on resource name > Create Trip
Customer Confirmation	• Field Service Dispatcher > Dispatch Center > (M) Navigate > Customer Confirmation • Field Service Dispatcher > Dispatch Center > Right-click on task in Task list > Customer Confirmation • Field Service Dispatcher > Dispatch Center > Plan Board or Gantt view> Right-click on task > Customer Confirmation • Field Service Dispatcher > Dispatch Center > (T) Overview > [Customer Confirmation]. The dynamic label toggles to Customer Confirmation Received when a confirmation is obtained and recorded. • Field Service Dispatcher > Service Request > Service Requests > Create Service Requests > (T) Tasks
Field Service Dispatch Center	Field Service Dispatcher > Dispatch Center

Window/Page	Navigator Menu Path
Field Service Dispatch Center - Gantt view	Field Service Dispatcher > Dispatch Center > (I) Gantt
Field Service Dispatch Center - Map view	Field Service Dispatcher > Dispatch Center > (I) Map
Field Service Dispatch Center - Plan Board view	Field Service Dispatcher > Dispatch Center > (I) Plan Board
Field Service Technician Dashboard	Field Service Technician Portal: Field Service Technician Dashboard
Field Service Support Dashboard	Field Service Administrator Portal: Field Service Support Dashboard
Find Invalid Address	• Field Service Dispatcher > Find Invalid Address • Field Service Dispatcher > Dispatch Center > (M) Tools > Find Invalid Addresses
Geo Tester	Field Service Dispatcher > Geo Tester
Inbound Reservations and Orders	• Field Service Technician Portal: Field Service Technician Dashboard > (I) Update Task for a Task > Parts subtab > [Receive] • Field Service Technician Portal: Field Service Support Dashboard > Quick Links > Receive Parts link
Receive Shipments	Field Service Dispatch Center > Plan Board or Gantt views > Right Click on resource name > Receive Parts
Report	Field Service Technician Portal: Field Service Technician Dashboard > (I) Update Task for a Task > Debrief subtab > [Task Report]

Window/Page	Navigator Menu Path
Resource Information	Field Service Dispatcher > Dispatch Center > Plan Board view or Gantt view > Right-click Resource Name > Resource Information
Schedule Management	• Field Service Dispatcher > Dispatch Center > (M) Navigate > Schedule Management • Field Service Dispatcher > Dispatch Center > Plan Board or Gantt view > Right-click Resource Name > Schedule Management
Schedule Task	• Field Service Dispatcher > Dispatch Center > Right-click on a task in the Task list > Schedule • Field Service Technician Portal: Field Service Technician Dashboard > (I) Schedule next to a task in the Task table • Field Service Technician Portal: Field Service Technician Dashboard > (I) Update Task for a task > [Schedule]
Select Territories and Task Owners	Field Service Dispatcher > Dispatch Center > (M) Navigate > Select Territories and Task Owners
Service Contracts Coverage	Field Service Dispatcher > Dispatch Center > (T) Service Request > Warranty icon

Window/Page	Navigator Menu Path
Service History	• Field Service Dispatcher > Dispatch Center > (T) Service Request > [Service History]
	• Field Service Dispatcher > Dispatch Center > (M) Navigate > Service History
	• Field Service Dispatcher > Service History
	• Field Service Dispatcher > Dispatch Center > Task Right Click Menu > Schedule Task > Schedule Task Window > Advise Tab > click on technician's name > Service History of selected technician
Service Request	• Field Service Dispatcher > Service Request > Service Requests > Create Service Request
	• Field Service Dispatcher > Service Request > Service Requests > Find Service Request > [OK]
	• Field Service Dispatcher > Dispatch Center > Right-click on task in Task List > Source Document
	• Field Service Dispatcher > Dispatch Center > (M) Navigate > Source Document
	• Field Service Dispatcher > Dispatch Center > Plan Board view or Gantt view > Right-click Task > Source Document
	• Field Service Dispatcher > Dispatch Center > (T) Service Request > Right-click service request number > Source Document

Window/Page	Navigator Menu Path
Signature	• Field Service Technician Portal: Field Service Technician Dashboard > (I) Update Task for a Task > Debrief subtab > [Task Report] > [Sign] • Field Service Technician Portal: Field Service Technician Dashboard > (I) Update Task for a Task > Debrief subtab > [Sign]
Skill Assignment	Field Service Dispatcher > Skill Assignment
Submit Requests: Autonomous Scheduler	Field Service Setup > Autonomous Scheduler
Task and Escalation Status	Field Service Setup > CRM Foundation > Task and Escalation Manager > Setup > Define Task Status
Task Dependencies	• Field Service Dispatcher > Dispatch Center > (M) Navigate > Task Dependencies • Field Service Dispatcher > Dispatch Center > Task, Plan Board, or Gantt views > Right-click on task > Task Dependencies
Task Parent/Child	• Field Service Dispatcher > Dispatcher Center > (M) Navigate > Parent/Child • Field Service Dispatcher > Dispatch Center > Tasks view > Right-click Task in Tasks list > Parent/Child • Field Service Dispatcher > Dispatch Center > Gantt view > Right-click Task > Parent/Child • Field Service Dispatcher > Dispatch Center > Plan Board view > Right-click Task cell > Parent/Child
Tasks	Field Service Dispatcher > Task Management

Window/Page	Navigator Menu Path
Update Task	Field Service Technician Portal: Field Service Technician Dashboard > (I) Update Task for a task
Update Trip	Field Service Dispatch Center > Plan Board or Gantt views > Right-click on Departure or Arrival > Update Trip
View Parts Order Status	Field Service Dispatcher > Spares Management > Spares Logistics > Parts Requirement
View Requests	Field Service Dispatcher > Other > View Requests

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