

**Oracle® Mobile Field Service**  
User Guide  
Release 12.2  
**Part No. E48996-02**

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# Contents

## Send Us Your Comments

## Preface

## Part 1 Overview Oracle Mobile Field Service

### 1 Understanding Oracle Mobile Field Service

Overview of Oracle Mobile Field Service.....	1-1
Overview of the Oracle Field Service Suite.....	1-12
Oracle Field Service Process Flow.....	1-14

## Part 2 Oracle Mobile Field Service Store and Forward - Laptop and Pocket PC (Offline)

### 2 Using Oracle Mobile Field Service Store and Forward - Pocket PC

Introduction.....	2-2
Application Overview.....	2-2
Navigation Path of Oracle Mobile Field Service Store and Forward - Pocket PC.....	2-4
Launching Oracle Mobile Field Service Store and Forward - Pocket PC .....	2-6
Using Global Functionality.....	2-7
Configurable Display.....	2-9
Data Search and Sort Capabilities.....	2-11
Working with the Task List.....	2-12
Viewing a Past or Future Task List.....	2-16
Viewing and Updating Task Information.....	2-17

Viewing a Task Attachment.....	2-24
Uploading Attachments.....	2-25
Creating a Task.....	2-30
Creating a Personal Task.....	2-32
Working with Service Requests.....	2-34
Accessing the Knowledge Base.....	2-48
Creating and Viewing a Note.....	2-48
Executing a Mobile Query.....	2-53
Performing a Part Search.....	2-54
Using Radius Search.....	2-54
Ordering Parts.....	2-54
Receiving Parts.....	2-55
Getting Driving Directions.....	2-55
Performing Debrief Reporting.....	2-55
Obtaining an Electronic Signature.....	2-77
Counter Readings.....	2-79
Managing Spare Parts .....	2-80
Viewing Customer Information .....	2-86
Viewing Customer Product Information.....	2-91
Using Messaging .....	2-94
Automatically Synchronizing with the Enterprise System.....	2-97
Manually Synchronizing with the Enterprise System.....	2-98
Changing Passwords.....	2-100
Closing the Application .....	2-100

### **3 Using Oracle Mobile Field Service Store and Forward - Laptop Technicians Dashboard**

Introduction.....	3-2
Launching and Synchronizing Oracle Mobile Field Service Store and Forward - Laptop.....	3-4
Understanding the Field Service Technician Dashboard.....	3-10
Using Simple Search and Advanced Search.....	3-17
Assigning Unassigned Tasks to Technicians.....	3-20
Viewing and Opening Tasks.....	3-21
Performing Debrief.....	3-23
Setting Counters and Counter Properties.....	3-24
Creating and Viewing Notes.....	3-25
Ordering Parts for a Specific Task.....	3-26
Ordering Parts for Trunk Stock.....	3-29
Viewing Parts Order Details.....	3-30
Transferring Parts Between Sub-Inventories.....	3-31

Viewing the Technicians Calendar.....	3-33
Creating a Personal Task.....	3-35
Creating Service Requests.....	3-36
Viewing Customer Information.....	3-40
Viewing Install Base Information.....	3-40
Viewing and Sending Messages.....	3-41
Viewing Contract Information.....	3-43
Viewing Service History.....	3-45
Viewing and Changing Service Request Information.....	3-45
Understanding Task Creation.....	3-47
Creating a Task Based on an Existing Task.....	3-47
Creating a Task Based on an Existing Service Request.....	3-48
Viewing a Service Request Attachment.....	3-50
Uploading Attachments.....	3-51
Logging Out.....	3-53

## **4 Using Oracle Mobile Field Service Store and Forward - Laptop Administrators Dashboard**

Introduction.....	4-1
Launching and Synchronizing Oracle Mobile Field Service Store and Forward - Laptop.....	4-2
Understanding the Field Service Administrator Dashboard.....	4-6
Activating and Disabling Members of a Multiple User Laptop Group.....	4-12
Creating Service Requests.....	4-14
Assigning Unassigned Tasks.....	4-18
Assigning Multiple Resources to a Task.....	4-19
Reassigning Tasks.....	4-22
Viewing and Sending Messages.....	4-23
Setting Up File-Based Synchronization.....	4-25

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

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

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

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

Introduction.....	6-2
Getting Started.....	6-4
Viewing, Managing, and Updating Your Tasks.....	6-7
Viewing Today's Tasks.....	6-8

Performing a Task Search.....	6-10
Updating an Existing Task.....	6-12
Recording Counter Readings.....	6-14
Adding Debrief Lines to a Task.....	6-15
Adding a Labor Line.....	6-22
Creating a Service Request.....	6-23
Creating a Service Request from the Main Menu.....	6-25
Creating a Follow-Up Task.....	6-25
Understanding Scheduling Tasks.....	6-27
Starting Self-Assigned Tasks Immediately.....	6-28
Self-Scheduling Tasks.....	6-30
Using Window to Promise to Schedule Tasks.....	6-31
Using the Intelligent Mode to Schedule Tasks.....	6-33
Viewing Install Base Product Configuration.....	6-35
Making Mobile Queries.....	6-36
Performing a Parts Search.....	6-37
Using Radius Search Capabilities.....	6-37
Creating a Parts Requirement.....	6-41
Ordering Parts.....	6-42
Creating an Internal Transfer.....	6-43
Creating a Move Order.....	6-44
Creating an Internal Order.....	6-45
Receiving Parts.....	6-46
Returning Parts.....	6-47
Transferring Parts.....	6-52
Viewing Project Details.....	6-52
Accessing the Knowledge Base.....	6-54
Getting Driving Directions.....	6-55
Viewing and Saving an Offline Schedule.....	6-56
Managing Receipt of Shipments.....	6-56
Changing Passwords.....	6-57
Selecting Preferences.....	6-59

## Part 4 Oracle Mobile Field Service Notifications

### 7 Using Mobile Field Service Notifications

Using Notifications.....	7-1
--------------------------	-----

## **A Scheduling and Completing Tasks**

Introduction.....	A-1
Conform to the Schedule.....	A-1
Order of Task Completion.....	A-2
General Operating Rules.....	A-2

## **Index**



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# Send Us Your Comments

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

**Part No. E48996-02**

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

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# Preface

## Intended Audience

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

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

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

## Documentation Accessibility

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## Structure

- 1 Understanding Oracle Mobile Field Service**
- 2 Using Oracle Mobile Field Service Store and Forward - Pocket PC**
- 3 Using Oracle Mobile Field Service Store and Forward - Laptop Technicians Dashboard**
- 4 Using Oracle Mobile Field Service Store and Forward - Laptop Administrators Dashboard**
- 5 Using an E-Mail Interface for Mobile Queries**
- 6 Using Oracle Mobile Field Service - Wireless**
- 7 Using Mobile Field Service Notifications**
- A Scheduling and Completing Tasks**

## Related Information Sources

### Integration Repository

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

The Oracle Integration Repository is shipped as part of the 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 Mobile Field Service Implementation Guide

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

### Oracle Field Service Implementation Guide

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

### Oracle Field Service User Guide

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

## Installation and System Administration

### Oracle Alert User's Guide

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

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

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## **Other Implementation Documentation**

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

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

## **Training and Support**

### **Training**

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

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

### **Support**

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

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

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

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

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

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

# Part 1

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## Overview Oracle Mobile Field Service



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# Understanding Oracle Mobile Field Service

This chapter covers the following topics:

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

## Overview of Oracle Mobile Field Service

Oracle Mobile Field Service is part of the Oracle Field Service Suite of products. Oracle Mobile Field Service contains four mobile applications. These applications are:

- Oracle Mobile Field Service Store and Forward - Pocket PC
- Oracle Mobile Field Service Store and Forward - Laptop
- Oracle Mobile Field Service - Wireless

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

### Oracle Mobile Field Service Store and Forward - Pocket PC and Laptop

The Oracle Mobile Field Service Store and Forward - Pocket PC application is a disconnected (off line) application that runs on a Pocket PC device. This application requires a synchronization process with the enterprise system to receive and send information related to field service technicians. Because Oracle Mobile Field Service Store and Forward - Pocket PC runs on a Pocket PC, it is highly mobile and usable. The service request, and all associated information, is stored locally on the Pocket PC. This enables field service technicians to work in all places independent of network coverage. The dispatcher sends a job to the field service technician using the Field Service Dispatch Center in the Oracle Field Service application.

The Oracle Mobile Field Service Store and Forward - Laptop application is a disconnected (off line) application that runs on a mobile laptop device. This application requires a synchronization process with the enterprise system to receive and send information related to field service technicians and administrators. The application contains a Field Service Technician Dashboard and a Field Service Administrator Dashboard.

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

## Oracle Mobile Field Service - Wireless

The Oracle Mobile Field Service - Wireless application offers a complete, automated, and streamlined field service solution to field service technicians by providing real-time wireless access to the enterprise applications. Using any wireless device, the field service technicians can remotely access the latest, most accurate and critical information required to perform their job.

The Mobile Field Service - Wireless application facilitate the communication between the office, dispatchers, and the mobile workforce. Using Mobile Field Service - Wireless applications, the field service technicians are in real time contact with their central office.

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

Mobile Field Service - Wireless provides the most flexible, scalable, and reliable mobile infrastructure. Using them provides browser based internet access on mobile devices independent from the underlying wireless infrastructure including networks, protocols, devices, markups, and gateway.

Oracle Mobile Field Service Wireless supports the following technology:

- **Small Form Factor:** This includes WAP-enabled phones and some smaller RIM pagers.

- **Medium Form Factor:** This includes most Personal Digital Assistants (PDA) such as, iPAQ, HP Jornada, Palm, and large RIMs.

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

## Oracle Mobile Field Service Applications Compared

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

In the table below the abbreviations are:

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

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

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

Feature	FSTP and FSAP	MFS (S&F) Laptop	MFS (S&F) PPC	MFS Wireless PPC (Medium)	MFS Wireless WAP (small screen)
View contracts	Yes	Yes	Yes	Yes	No
View customer and contact details	Yes	Yes	Yes	Yes	Yes
Update counter reading	Yes	Yes	Yes	Yes	No
Process debrief	Yes	Yes	Yes	Yes	Limited (Expense and Labor)
Search parts	No	Yes	Yes	Yes	Yes
Transfer parts	No	Yes	Yes	Yes	Yes
Order parts	Yes	Yes	Yes	Yes	No
Receive parts	Yes	No	No	Yes	No
View/Create notes	Yes	Yes	Yes	Yes	No
Upload/download attachment	Yes	Yes	Yes	Yes	No
View service history	Yes	Yes	Yes	Yes	Yes
View install base configuration	Yes	Yes	Yes	Yes	No
Flex field support	Yes	Yes	Yes	Yes	No
Capture Signature	Yes	Yes	Yes	Yes	No
SDK Customization Support	No	Yes	Yes	No	No
Messaging support	No	Yes	No	No	No

Feature	FSTP and FSAP	MFS (S&F) Laptop	MFS (S&F) PPC	MFS Wireless PPC (Medium)	MFS Wireless WAP (small screen)
KM Integration	Yes	No	*Yes	Yes	No
Access Maps and Driving Directions	Yes	No	*Yes	Yes	No
Return Parts	Yes	No	*Yes	Yes	No
Process Unused and Defective on Arrival Parts during debrief	Yes	No	No	Yes	No
Parts radius search	Yes	No	*Yes	Yes	No
Internal asset support	Yes	Yes	Yes	Yes	Yes
Create follow up task	Yes	Yes	Yes	Yes	No
Travel debrief	Yes	Yes	Yes	Yes	No
Manually post debrief	Yes	No	No	Yes	No
Pro forma Invoice	Yes	No	No	No	No
Self Assign Tasks	No	Yes	Yes	Yes	No
Self schedule tasks	Yes	No	No	Yes	No
Schedule task using intelligent mode	Yes	No	No	Yes	No
Schedule tasking using WTP mode	Yes	No	No	Yes	No
NLS language Support	Yes	Yes	Yes	Yes	Yes
File Sync Support	No	Yes	No	No	No

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

## Key Features

### Mobile Field Service Store and Forward - Laptop and Pocket PC

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

- Service Requests and Tasks
- Debrief Reporting
- Spares Management
- Mobile Customization Support

#### **Service Requests and Tasks:**

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

- View and update a service request and task.

Upon receipt into the mobile application, a task has a status of "Assigned".

However, as the task progresses, the field service technician can change this status and task type.

- Work on a task.

For a complete description on how field service technicians may complete a task, see "Field Service Process Flow", page 1-14.

- Create a service request and task.

The dispatch center issues the service request and task to the field service technician. On some occasions, a problem may be detected at the customer site that was not recognized by the dispatch center. In this case, the field service technician can create a service request and task.

Tasks that technicians create using the mobile application are automatically assigned to them, provided that the task type is associated with the "dispatch rule" and the task has a status of "Assigned." Technicians can immediately work on the new task assignment, including entering debriefs.

If the install base item for a service request is not correct, technicians are able to change this install base item. Furthermore, they can create a service request for an install base item at the customer location.

- View service history.

The Oracle Mobile Field Service Store and Forward applications display service histories for closed or completed service requests, detailing any install base item and customer information.

Only closed service requests are downloaded with a service history. Service history information is read-only. If the service request is based on the install base product, then the service history for the install base product is available to view. Otherwise, for that customer or customer location, a history will be displayed.

The following information is replicated for a service history record:

- Closed or completed service request.
- Primary contact of this closed service request.
- Product or item of the service request, excluding parent and child records.
- Closed tasks of this service request.
- Closed task assignments of these tasks (role = assignee).
- Resources of these task assignments.
- Debrief lines belonging these task assignments.

See Appendix A, "Item Handling for the Mobile Field Service Store and Forward Applications", *Oracle Mobile Field Service Implementation Guide* for additional details about information replication.

- View customer and product information

The Oracle Mobile Field Service Store and Forward applications provide technicians with ample information on the customer, such as address and notes. The applications also offers a detailed description of the customer product.

- Record counter readings

For a customer product, the Oracle Mobile Field Service Store and Forward applications enable technicians to set and reset counter readings for this product if this is desirable. Counter readings are helpful in scheduling maintenance.

- Time zone support

The Oracle Mobile Field Service Store and Forward applications enable operations across multiple time zones. All the times displayed on the client are local times. All times are stored in the database in server time. Appropriate conversions are made whenever required for storage or display. The SERVER\_TIMEZONE\_ID and CLIENT\_TIMEZONE\_ID profiles enable the server and client time zones to be set. If the appropriate profile options for either of these profiles are not defined, then no time zone conversion will occur and all times will be shown in the server time.

#### **Debrief Reporting:**

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

task.

- Material report item

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

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

The following system items are replicated to the mobile devices:

- Items used in a service request assigned to or created by the mobile user.
- Item instance items used in a service request assigned to or created by the mobile user.
- Items used in debrief lines.
- Items used in item orders.
- Items present in a good subinventory assigned to the mobile user.
- Items present in the inventory organization specified by the Service: Inventory Validation Organization profile.
- Signature capture

The Oracle Mobile Field Service Store and Forward applications enable you to obtain a customers electronic signature for task sign off. The customers electronic signature indicates that the task is complete and that the customer has accepted your work.

#### **Spares Management:**

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

- Order parts

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

- View order status

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

- Transfer parts

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

- Category set limiting

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

**Mobile Customization Support:**

Mobile customization enables you to tailor Oracle Mobile Field Service Store and Forward functionality to fit your business needs and practices. Customization is done through flexfields and the Software Development Kit (SDK). See the *Customization Support for Oracle Mobile Field Service* document to learn more about the SDK. For more information about customization support, see Appendix E, "Customization Support for the Oracle Mobile Field Service Store and Forward Applications", *Oracle Mobile Field Service Implementation Guide*.

Descriptive flexfields provide customization capabilities in an Oracle Mobile Field Service Store and Forward application. This satisfies various user needs without having to reprogram the application.

Users can also use context-sensitive flexfields when the information stored by the application depends on other values users enter in other parts of the screen.

The following table describes the types of flexfields you can find in Oracle Mobile Field Service Store and Forward:

Flexfield	Laptop	Pocket PC
Service request	read/write	read/write
Task	read/write	read/write
Debrief header	read/write	read/write
Debrief line	read/write	read/write
Parts requirement	NA	read/write
Item	read	read

Flexfield	Laptop	Pocket PC
Product	read	read
Customer	read	read

See "Flexfield Support", *Oracle Mobile Field Service Implementation Guide* to learn how to set up descriptive flexfields in an Oracle Mobile Field Service Store and Forward application.

### Mobile Field Service - Wireless

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

- Ability to capture debrief information, use return routing to process unused and defective on arrival parts during debrief, and manually post debrief lines.
- Ability to search for parts in a warehouse, technician's subinventory, and co-workers subinventory using radial search.
- Ability to create parts orders.
- Ability to find driving directions between task locations.
- Ability to change password.
- Ability for the Field Service Technician's to schedule the task by selecting the following options:
  - Work on it: This option provides the technician with the ability to start working on the new tasks created right away.
  - Self-Schedule: This option provides the technicians with the ability to schedule the task for themselves for a date and time that is convenient to them later.
  - Windows to Promise: This option provides the technician with the ability to provide windows of time to the customer and let the customer choose the best option of date and time that suits them.

**Note:** In the case of Windows to Promise option, the tasks would be assigned to any technicians who are available.

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

- Support for multiple responsibilities (ability to support custom responsibilities in addition to the seeded responsibilities).
- Support for internal location (ability to view and create tasks when the service request incident address is not a party site).
- Ability to choose between displaying images and buttons in the application.

## Key Benefits

### Mobile Field Service - Wireless

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

- Enables a field service technician access to the complete service request and customer and product information.
- Faster response time to last minute schedule changes.
- Instant updating of the enterprise applications with parts, time and expenses.
- Replenish parts based on inventory levels.
- Provides faster billing cycle through remote capturing of counters and on-site invoicing.
- Enables flexibility in choosing devices.
- Provides dispatcher with real time status and action updates for all of their field technicians and their jobs.
- Provides secure communication while transmitting the data to and from wireless devices.

## Overview of the Oracle Field Service Suite

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

Suite Application	Description
Customer Care	Customer Care is not a product of the Oracle Field Service suite but the Service Request window is delivered with the Oracle Field Service application. The Service Request window is used by the call center to enter service requests for problems reported by the customer.
CRM Foundation	The products in CRM Foundation are essential to use Oracle Field Service. The CRM Foundation products create tasks, territories, define resources, and assist in the assignment of tasks to resources. CRM Foundation is delivered with Oracle Field Service.
Oracle Field Service	This application assists in assigning tasks to field service technicians, creating and dispatching daily schedules, monitoring progress, and reporting on material, expense, and labor transactions.
Oracle Advanced Scheduler	This application enables optimization of scheduling capabilities of tasks to qualified resources. It takes into account driving time, distance, and part availability, and it creates part reservations.
Oracle Spares Management	This application provides additional logistics and planning features to manage a service parts inventory in a multi-location environment.
Mobile Application Foundation	This application consists of a mobile client and a central application. It provides data transport between the Oracle enterprise system and the Oracle mobile client database. The Mobile Application Foundation is used by the Mobile Field Service Store and Forward applications.

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

## Oracle Field Service Process Flow

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

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

---

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

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

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

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

# Part 2

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## **Oracle Mobile Field Service Store and Forward - Laptop and Pocket PC (Offline)**



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## Using Oracle Mobile Field Service Store and Forward - Pocket PC

This chapter covers the following topics:

- Introduction
- Application Overview
- Navigation Path of Oracle Mobile Field Service Store and Forward - Pocket PC
- Launching Oracle Mobile Field Service Store and Forward - Pocket PC
- Using Global Functionality
- Configurable Display
- Data Search and Sort Capabilities
- Working with the Task List
- Viewing a Past or Future Task List
- Viewing and Updating Task Information
- Viewing a Task Attachment
- Uploading Attachments
- Creating a Task
- Creating a Personal Task
- Working with Service Requests
- Accessing the Knowledge Base
- Creating and Viewing a Note
- Executing a Mobile Query
- Performing a Part Search
- Using Radius Search

- Ordering Parts
- Receiving Parts
- Getting Driving Directions
- Performing Debrief Reporting
- Obtaining an Electronic Signature
- Counter Readings
- Managing Spare Parts
- Viewing Customer Information
- Viewing Customer Product Information
- Using Messaging
- Automatically Synchronizing with the Enterprise System
- Manually Synchronizing with the Enterprise System
- Changing Passwords
- Closing the Application

## Introduction

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

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

## Application Overview

As a field service technician, you will have the following general responsibilities when

using Oracle Mobile Field Service Store and Forward - Pocket PC:

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

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

1. Launch Oracle Mobile Field Service Store and Forward - Pocket PC.

See *Launching Oracle Mobile Field Service Store and Forward - Pocket PC*, page 2-6.

2. Synchronize Oracle Mobile Field Service Store and Forward - Pocket PC with the enterprise system.

See *Synchronizing with the Enterprise System*, page 2-98.

3. Review your calendar for the day.

See *Working with Your Task List*, page 2-12.

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

See *Viewing and Changing Task Information*, page 2-17.

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

See *Viewing and Changing Task Information*, page 2-17.

6. Learn the customer address.

See *Viewing Customer Information*, page 2-86.

7. Review service request information.

See *Working with Service Requests*, page 2-34

- Review contract information.

See *Viewing Contract Information*, page 2-39.

- Review service history information.

See *Viewing Service Request History*, page 2-42.

- Create or update a customer note if necessary.

See *Creating and Viewing a Note*, page 2-48.

8. Set any counter and counter properties.

See Counter Readings, page 2-79.

9. Report task details.

See Debrief Reporting, page 2-55.

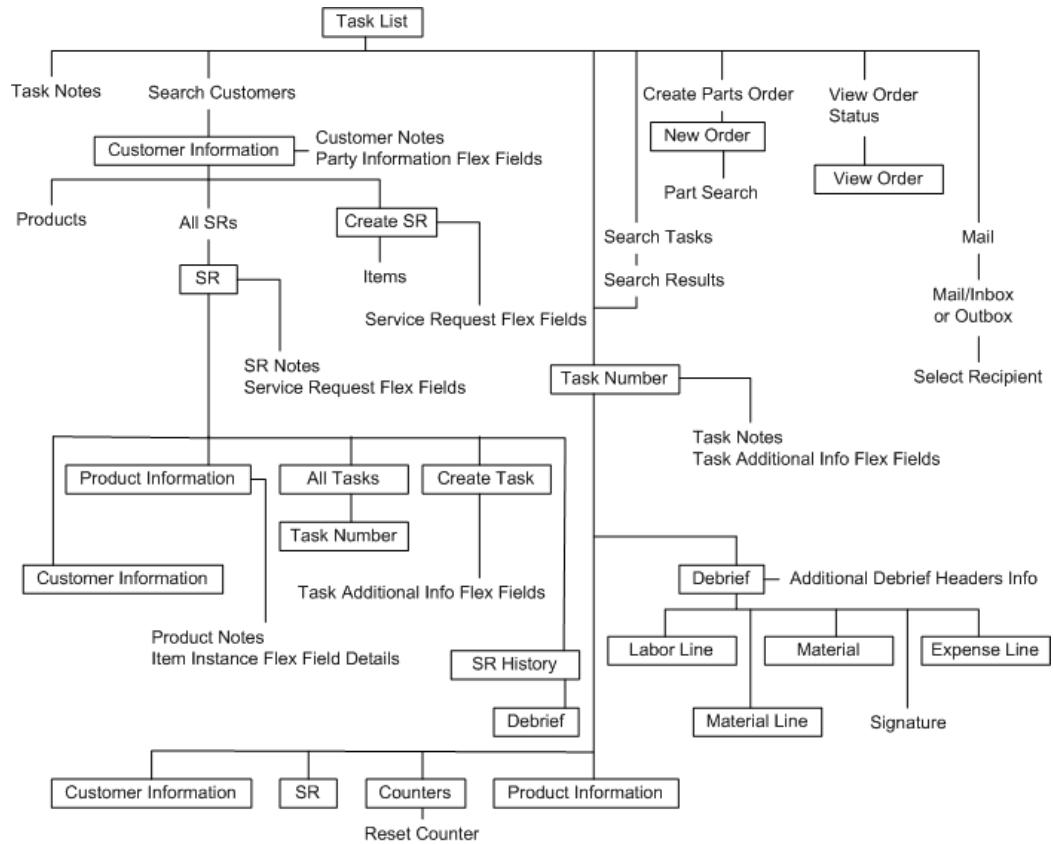
10. Repeat these steps for each task that time allows.

11. Finally, exit out of Oracle Mobile Field Service Store and Forward - Pocket PC.

See Closing the Application, page 2-100.

## **Navigation Path of Oracle Mobile Field Service Store and Forward - Pocket PC**

This diagram displays the high-level structure of Oracle Mobile Field Service Store and Forward - Pocket PC.



In Oracle Mobile Field Service Store and Forward - Pocket PC, there are screens with and without global functionality. A screen that has global functionality contains various global icons in the lower portion of the screen. See [Using Global Functionality, page 2-7](#) for further details. In the above diagram, text within a rectangle represents a screen with global functionality.

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

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

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

and access service request flexfield information.

The Copy Service Request screen copies information from the parent service request header, and then you can update many fields.

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

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

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

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

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

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

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

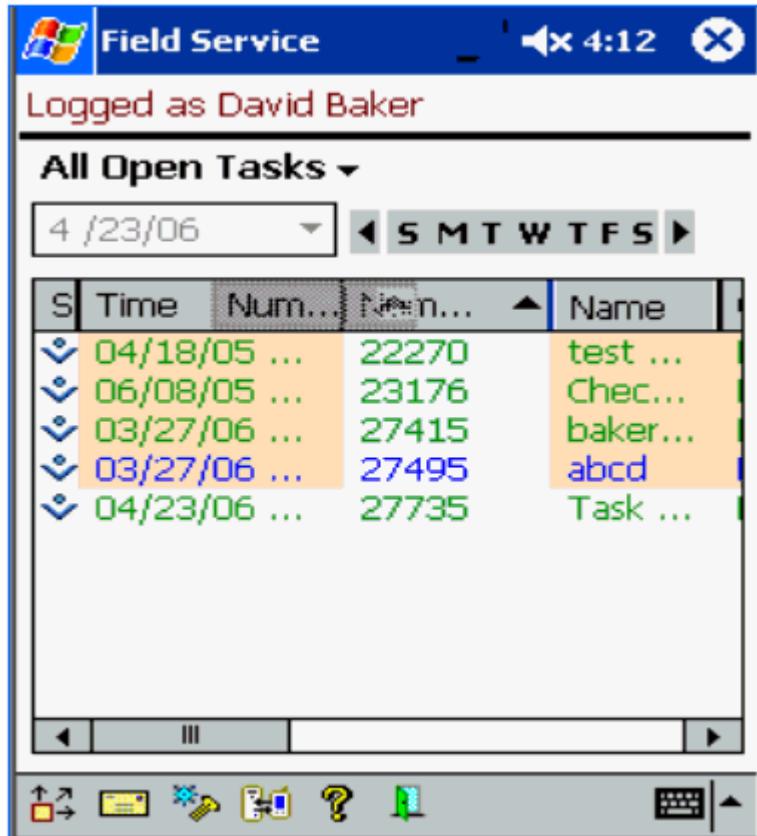
## Launching Oracle Mobile Field Service Store and Forward - Pocket PC

### Steps:

Complete this procedure to launch Oracle Mobile Field Service Store and Forward - Pocket PC.

1. Select Start > FieldService.

Oracle Mobile Field Service Store and Forward - Pocket PC opens in the Task List screen. This screen is the starting point in the Oracle Mobile Field Service Store and Forward - Pocket PC application. See Working with Your Task List, page 2-12 for a complete description of the Task List screen.



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

See [Synchronizing with the Enterprise System, page 2-98](#) for a complete description of this procedure.

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

## Using Global Functionality

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

The following graphics display most global functionality found in Oracle Mobile Field Service Store and Forward - Pocket PC.

The global icons perform the following functions:



Tap the home icon to go to the Task List screen. See [Working with Your Task List](#), page 2-12.



Tap the notes icon to create or view notes. See [Creating and Viewing a Note](#), page 2-48.



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



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



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



Tap the synchronize icon to synchronize Oracle Mobile Field Service and Forward - Pocket PC with the enterprise system. See [Synchronizing with the Enterprise System](#), page 2-98.



Tap the mobile queries icon to start a mobile query. See [Executing a Mobile Query](#), page 2-53.



Tap the driving directions icon to get driving directions. See [Getting Driving Directions](#), page 2-55.



Tap the Knowledge Management icon to access the knowledge base. See [Accessing the Knowledge Base](#), page 2-48.



Tap the mail icon to access messaging. See [Messaging](#), page 2-94.



Tap the parts icon to perform spares management. See [Spare Parts Management](#), page 2-80.



Tap the attachment icon to view attachments for either a task or service request. See [Viewing a Task Attachment](#), page 2-24 and [Viewing a Service Request Attachment](#), page 2-39.



Tap the help icon to receive general and Oracle Mobile Field Service Store and Forward - Pocket PC-specific help. You can also tap this icon to define preferences and change your password. For the last, see [Changing Passwords](#), page 2-100.



Tap the search customer icon to go to the customer menu.



Tap this icon to log out of the Store & Forward Pocket PC.

## Configurable Display

Configurable display helps technicians customize screens.

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

## Hide, Show, or Re-size Columns

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

the column width.

- To re-size a column, select the column, and then drag sideways to adjust the width.

## Change Column Sequence

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

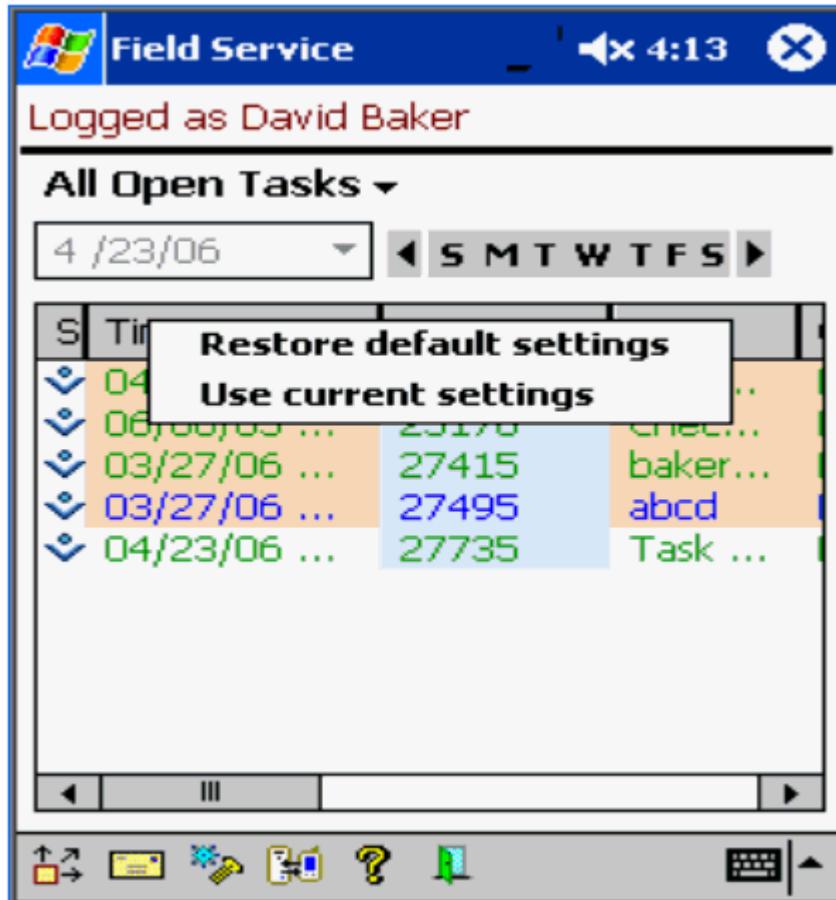
## Restore Default Settings

To restore the default setting for a column:

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

The following two options appear:

- Restore default settings
- Use current settings



3. Tap Restore default settings.

## Data Search and Sort Capabilities

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

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

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

- Search Task Results
- Search Customers

## Using Data Search

Use these steps to perform a data search:

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

Data containing that value is highlighted.

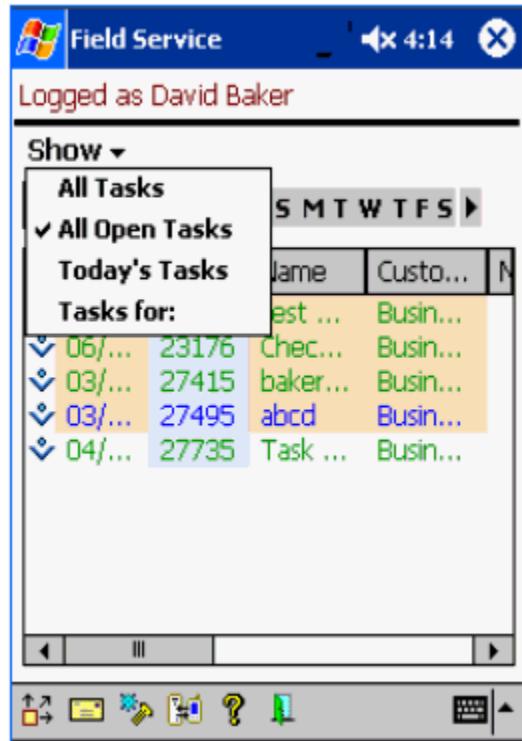
## Working with the Task List

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

You will want to update the task status to keep your schedule up to date and to inform the dispatcher on the progress of your schedule. See Viewing and Changing Task Information, page 2-17 for a complete description of this procedure.

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

The Task List screen is the starting point in the Oracle Mobile Field Service Store and Forward - Pocket PC application. The Task List screen lists non-closed tasks in descending order, based on the scheduled date and time stamp. See Viewing a Past or Future Task List, page 2-16 to view the tasks for a different day.



## Understanding the Task List Screen

The Task List screen is updated each time you synchronize with the enterprise system. See [Synchronizing with the Enterprise System, page 2-98](#) for a complete description of this procedure.

You can perform the following from the Task List screen:

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

- Search for a customer for whom the technician is assigned tasks.
- View parts-related information.
  - View the on-hand quantity of parts.
  - View parts requirement status.
- Create orders and tasks
  - Create a parts requirement.
  - Create a personal task.

## The Task List Screen Table

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

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

If you tap in either the Task Status, Task Start Time, or Task Name column, Oracle Mobile Field Service Store and Forward - Pocket PC opens the Task screen for a task. See Viewing and Changing Task Information, page 2-17 for a complete description of this screen. If you click in the Customer of the task column, Oracle Mobile Field Service Store and Forward - Pocket PC opens the Customer screen for a task. See Viewing Customer Information, page 2-86 for a complete description of this screen. Finally, if you click in the Notes column, Oracle Mobile Field Service Store and Forward - Pocket PC opens the Task Notes screen for a task. See Creating and Viewing a Note, page 2-48 for a complete description of this screen.

## Task Statuses

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



Cancelled



Rejected



Assigned



Interrupted



Working



Completed

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

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

See Viewing and Changing Task Information, page 2-17 to learn how to change the status of a task.

## The Use of Color in the Task List Screen

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

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

## Viewing a Past or Future Task List

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

- Using the date drop-down list, page 2-16
- Using the calendar bar, page 2-17

### Using the Date Drop-down List:

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

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

A calendar appears.



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

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

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

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

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

### **Using the Calendar Bar:**

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

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



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

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

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

## **Viewing and Updating Task Information**

From the [Update] Task screen, you can access the following information:

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

Complete the following steps to view and change task information:

## Prerequisites

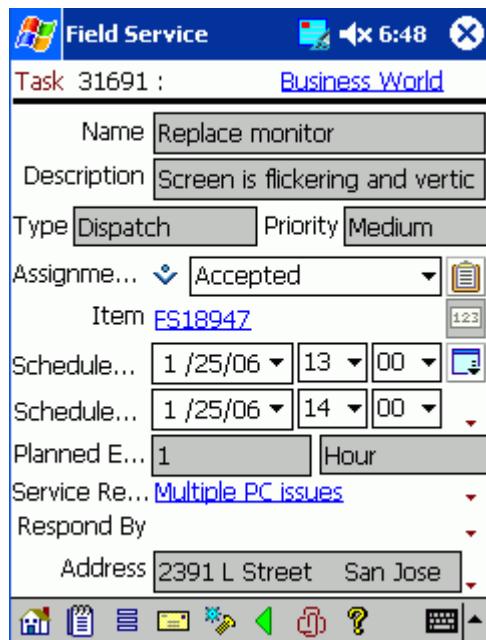
- Open a task from the Task List screen. See Working with Your Task List, page 2-12 and Viewing All Tasks for a Service Request, page 2-41.

### Steps:

1. Navigate to the Task screen.
2. Use one of the following methods to open the Task screen:
  - *To Open a Task Directly:*
    1. From the Task List screen, tap the desired task.

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

**Task Screen**



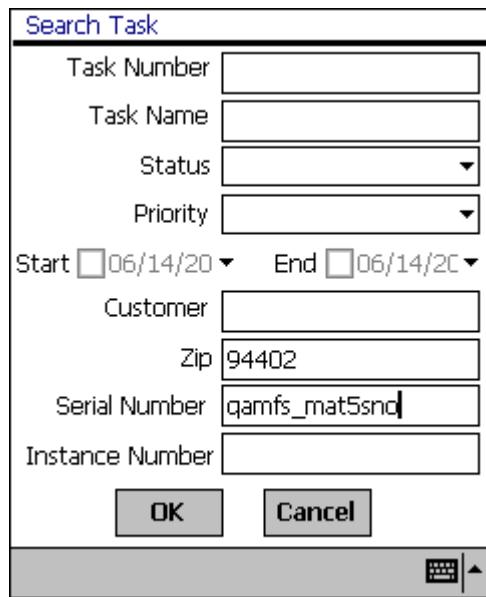
The following table describes the read-only information in the [Update] Task screen:

Read-only Information	Description
Task Number	Located in the screen title, this is a generated number for a task.
Customer field	Located in the screen title, this is the name of the customer. Tap this field to view additional customer product information. See <i>Viewing Customer Information</i> , page 2-86 for a complete description of this procedure.
Name field	The name of the task.
Description field	Describes the task.
Type drop-down list	The type of task.
Priority drop-down list	The priority of the task in which it is to be completed.
Item field	The name of the customer product that needs service. Tap this field to view additional customer product information. See <i>Viewing Customer Product Information</i> , page 2-91 for a complete description of this procedure.
Planned Effort field	The planned time duration for executing the task.
Service Request field	The name of the service request. Tap on this field to view additional information.
Respond By field	The date and time by which the customer needs a response regarding the task.
Address field	The address details for the customer.
Esc	If a task is escalated on the enterprise system, then "Esc" appears in the upper right corner of the Task screen, across from the screen title.

- *To Search for the Desired Task:*
  1. From the Task List screen, select **Search Tasks** from the Goto menu.

The Search Task screen appears.

### Search Task Screen



The image shows a mobile application interface titled "Search Task". The screen has a header "Search Task" and a footer with a calendar icon and a back arrow. The main area contains the following fields:

- Task Number: Text input field
- Task Name: Text input field
- Status: Drop-down menu
- Priority: Drop-down menu
- Start Date: Date picker showing 06/14/20
- End Date: Date picker showing 06/14/20
- Customer: Text input field
- Zip: Text input field showing 94402
- Serial Number: Text input field showing qamfs\_mat5snd
- Instance Number: Text input field

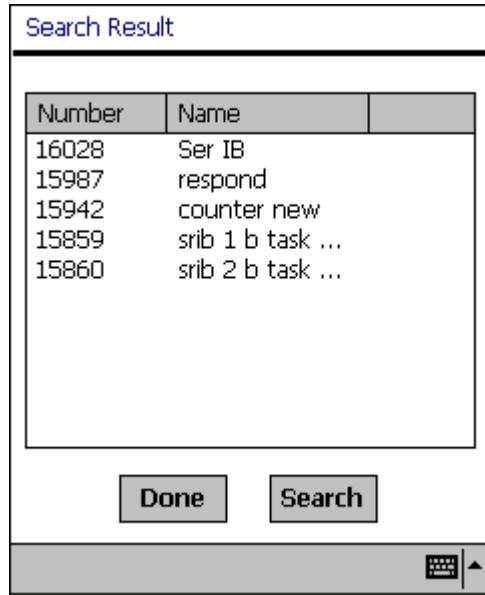
At the bottom are two buttons: "OK" and "Cancel".

2. Tap **OK** to view all tasks.

The Search Result screen appears.

To narrow your search, complete as many fields and drop-down lists as possible and then tap **OK**.

### Search Result Screen



The image shows a mobile application interface titled 'Search Result'. At the top is a header bar with the title 'Search Result'. Below the header is a table with two columns: 'Number' and 'Name'. The table contains five rows of data. At the bottom of the screen are two buttons: 'Done' on the left and 'Search' on the right. Below these buttons is a navigation bar with a calendar icon and an upward arrow icon.

Number	Name
16028	Ser IB
15987	respond
15942	counter new
15859	srib 1 b task ...
15860	srib 2 b task ...

**Done** **Search**

CALENDAR | ▲

3. Select the desired task.

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

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

See Creating and Viewing a Note, page 2-48 for a complete description of this procedure.

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

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

The application checks whether a labor line exists for a field service task when you change the assignment status to one with Completed or Closed flags enabled. Set the profile CSF: Mandatory Labor Debrief to Yes to enable this feature. A error message appears if you try to close a task without entering any labor line.

Similarly, the application checks whether a resolution code exists for the service request when you change the assignment status to one with Completed or Closed flags enabled. Set the profile CSF: Mandatory Resolution Code to Yes to enable this feature. A error message appears if you try to close a task without entering any labor line.

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

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

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

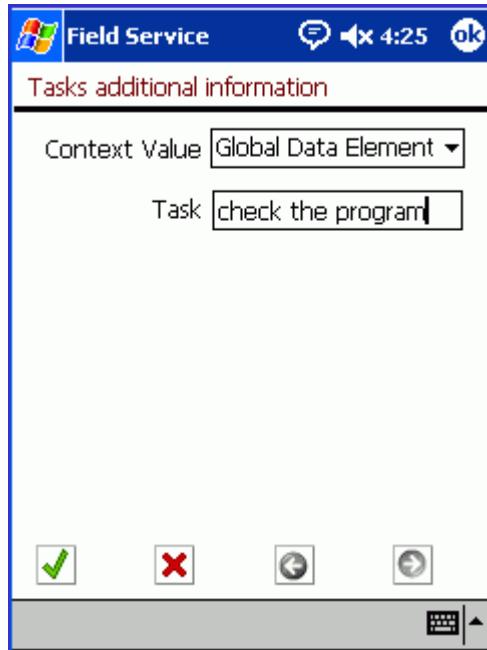
The default end time is the date and time the task was created.

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

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

The Task Additional Information screen appears.

### Tasks Additional Information Screen



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

8. Tap **OK** to save any work and return to the Task screen.  
Tap **Cancel** to return to the Task screen without saving any work.

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

The Debrief screen appears. From this screen, you can enter information for the labor, material, and expense reports. See Debrief Reporting, page 2-55 for a complete description of this procedure.

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

The SR screen appears. In this screen, you can view and change service request details, including the problem and resolution. See Viewing and Changing Service Request Information, page 2-34 for a complete description of this procedure.

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

The Counters screen appears. In this screen, you can set a counter reading. See Creating a New Counter Reading, page 2-79 for a complete description of this procedure.

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

See Viewing Parts Requirement Status, page 2-83 for a complete description of this procedure.

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

See Creating a Parts Requirement, page 2-81 for a complete description of this procedure.

14. To delete a task, tap the Undo icon in the tool bar.

A confirmation message "Are you sure to undo (Y/N)" pops up to notify you that this task will be marked for undo. Confirm the deletion by selecting Yes, and the application system initiates an immediate synchronization.

## **Viewing a Task Attachment**

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

### **Viewing a Task Attachment:**

1. Navigate to the Task screen.

See Viewing and Changing Task Information, page 2-17 for a complete description of this procedure.

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

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



3. Tap the file that you want to open.

The selected file opens.

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

## Uploading Attachments

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

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

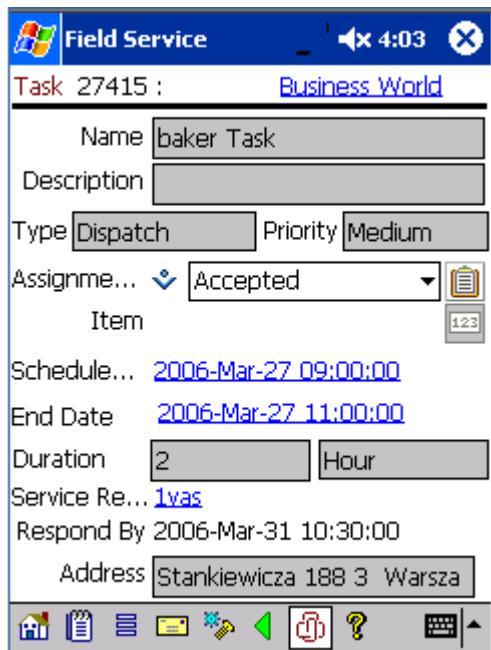
Supported Attachment Types:

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

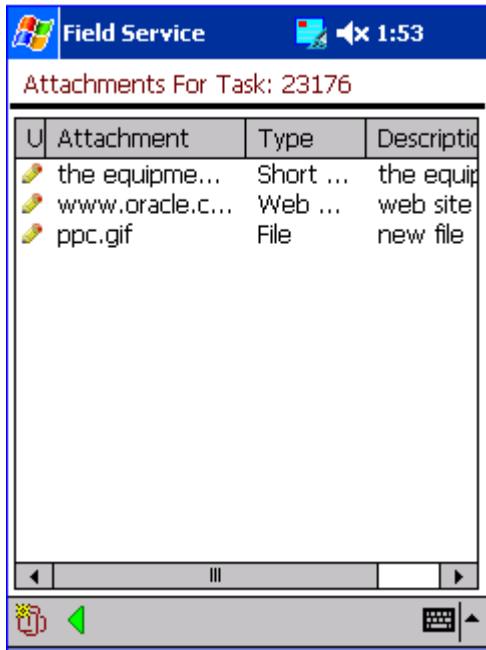
- Link a URL up to 4000 characters.
- Size is not limited by profile value.
- File Attachment.
  - Multiple file types are supported such as, .jpeg, .bmp, and .doc.
  - Attachment size is limited by the CSM: Maximum Attachment profile value. The profile value represents the size of the attachment in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

### To Create Attachments to an Existing Service Request or Task:

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



The Attachment Summary page appears.



2. Select the attachment "clip" icon to proceed with attachment details.
3. Select the type of the attachment from the Data Type drop-down menu. Attachment type options are:
  - File
  - Short Text
  - Web Page

Field Service 4:07

Attachment for Task: 27415

Data Type	Short Text
Description	File Short Text Web Page

Short Text

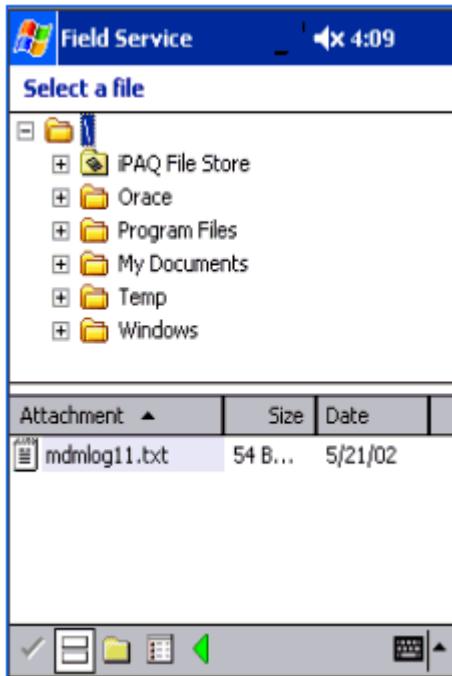
4. Depending on the type of attachment, provide details in the fields that appear.  
If the **File** attachment type is selected, enter the Description, and then use the search "flashlight" icon to find the location of the file, or enter the location details of the file in the File field column.

Field Service 4:08

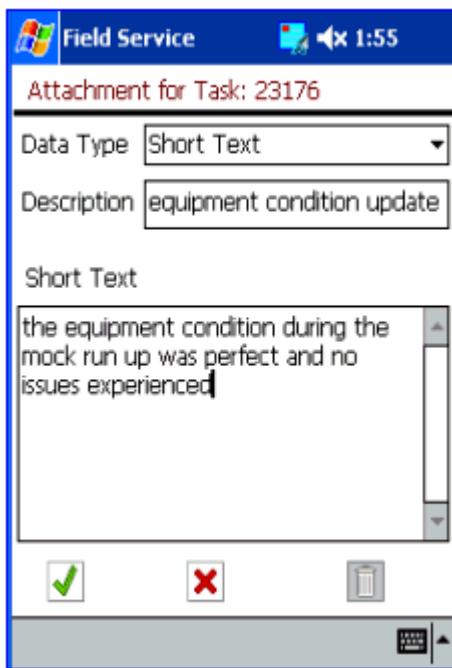
Attachment for Task: 27415

Data Type	File
Description	<input type="text"/>

File



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



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



5. Click the Check Mark button.
6. Synchronize with enterprise to upload the new attachment details to the enterprise.

## Creating a Task

Complete the following steps to create a task:

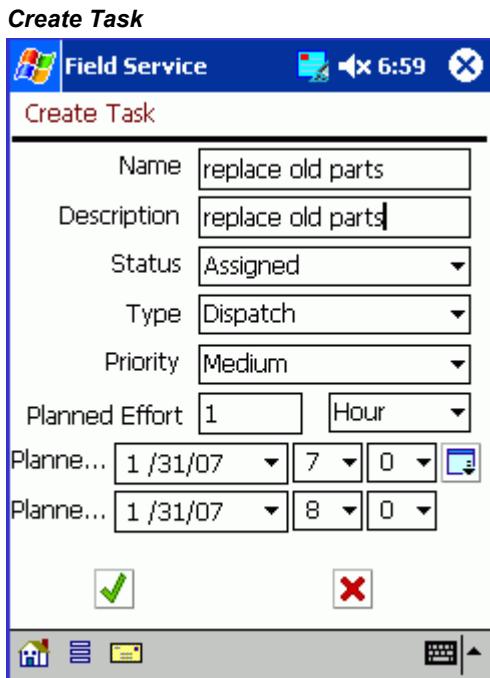
### Steps:

1. Navigate to the SR screen.

See Viewing and Changing Service Request Information, page 2-34 for a complete description of this procedure.

2. Tap **Create Task**.

The Create Task screen opens.



3. In the Name field, enter the name of the task that you want to create.
4. In the Description field, enter a brief description of the task.
5. From the Status drop-down list, select task status.

The default selection is Unassigned.

**Note:** For a task to be automatically assigned to you, it should have the "Assignment" attribute and the task type should have the Dispatch rule. You can immediately work on a task with this criteria, which includes entering debrief reports.

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

Next to this field is a drop-down list where you can select the type of time units.

9. To change the task planned start date, select a new date from the Start drop-down list.

See Using the Date Drop-down List, page 2-16 for a complete description of this

procedure.

10. To change the task planned start time, select a new time from the Start hours and minutes drop-down lists.

11. To change the task end date, select a new date from the End drop-down list.

See Using the Date Drop-down List, page 2-16 for a complete description of this procedure.

12. To change the task planned end time, select a new time from the End hours and minutes drop-down lists.

13. Tap **OK** to save the task.

Tap **Cancel** to return to the SR screen without saving the task. See Viewing and Changing Service Request Information, page 2-34 for a complete description of the SR screen.

## Creating a Personal Task

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

To create a personal task, complete the following steps:

### Steps:

1. From the Task List screen, select Create Personal Task.

### Create Personal Task



2. In the Create Personal Task screen specify the following information.
  - Name – Subject of the task. For example, Dentist Appointment.
  - Description – A detailed description of the task.
  - Status – Select the status from the list.
  - Type – By default, the task type is set to Personal.
  - Priority – Set the priority as High, Medium, or Low depending on criticality of the task.
  - Effort – Specify the time required to complete the task.
  - Scheduled Start Date – Select a start date for the task.
  - Scheduled End Date – Select an end date for the task.
  - Location – You can select a predefined address from the list or enter a new address.

Tap the Add button to add a new location, city, state, province, country, and zip

code.

3. Tap OK to save the personal task.

## Working with Service Requests

A service request is created when a customer contacts your organization with a problem. Typically, the customer representative analyzes the service request and assigns a task or tasks to it. Then the service request, along with all related information and tasks, are sent to the field service technician. You can view the summary details of a service request in the Task List screen. See Understanding the Task List Screen, page 2-13 for a complete description of this procedure.

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

### **Viewing and Changing Service Request Information:**

#### **Prerequisites**

Opening a task from the Task List screen. See "Working with Your Task List", page 2-12

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

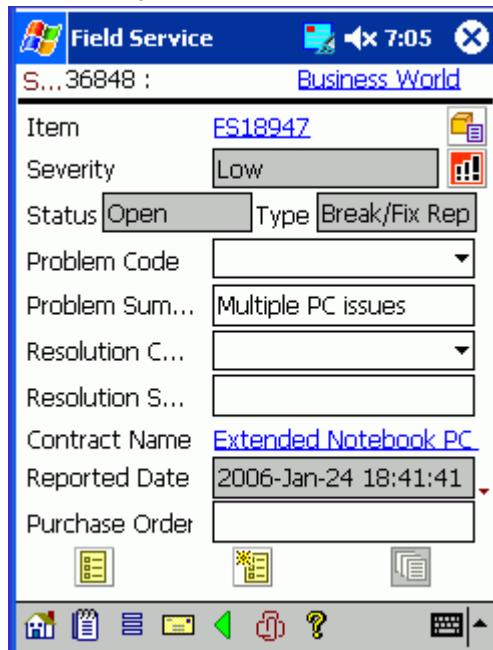
1. Navigate to the Task List screen and tap the desired task.

The Task screen opens. See "Viewing and Changing Task Information", page 2-17 for a complete description of this screen.

2. Tap **SR**.

The SR screen opens.

### Service Request



Field Service 7:05

S... 36848 : Business World

Item	FS18947
Severity	Low
Status	Open
Type	Break/Fix Rep
Problem Code	
Problem Summary	Multiple PC issues
Resolution Code	
Resolution Summary	
Contract Name	Extended Notebook PC
Reported Date	2006-Jan-24 18:41:41
Purchase Order	

Buttons: Home, Back, Forward, Help, Exit

3. Tap the Reported Date field.

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



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

Read-only Information	Description
Service request number	Located in the screen title, this is a generated number for a service request.
For field	The name of the customer. Tap this field to open the Customer screen where you can view additional customer information. See "Viewing Customer Information", page 2-86 for a complete description of this procedure.
Product field	The name of the customer product that needs service. Tap this field to view additional customer product information. See "Viewing Customer Product Information", page 2-91 for a complete description of this procedure.
Severity	The urgency of the service request.

Read-only Information	Description
Reported Date	The date that the incident was reported.
Contract field	The name of the customer contract. Tap this field to view additional contract information. See "Viewing Contract Information", page 2-39 for a complete description of this procedure.
Status drop-down list	The current status of the service request.
Type drop-down list	The type of service request.

4. To change the customer product, tap the ellipse (...) button near the Product field. The Products screen opens. See "Viewing and Changing a Customer Product for a Task", page 2-92 for a complete description of this procedure.
5. To add or change customer purchase order information, enter new information in the Customer PO field.
6. To change the service request problem type, open the Problem drop-down list and make the appropriate selection.
7. To change the service request problem resolution, open the Resolution drop-down list and make the appropriate selection.
8. In the lower portion of the SR screen, tap the note icon to view or add a service request note. See "Creating and Viewing a Note", page 2-48 for a complete description of this procedure.
9. To copy the service request, tap the SR Copy icon in the toolbar. The icon is disabled if no task exists with a working status.. See "Copying a Service Request", page 2-48 for a complete description of this procedure.
10. To view or add information to the service request flexfields, tap the flexfields icon in the lower portion of the screen. The Service Request screen opens.



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

11. Tap **OK** to save your work and return to the SR screen.  
Tap **Cancel** to return to the SR screen without saving your work.
12. To view all the tasks for the current service request, tap **All Tasks**.  
The All Tasks for SR screen opens. In this screen, you can view all the tasks for the service request. See "Viewing All Tasks for a Service Request", page 2-41 for a complete description of this procedure.
13. To create a task for the service request, tap **Create Task**.  
The Create Task screen opens. Use this screen to create a task. See "Creating a Task", page 2-30 for a complete description of this procedure.
14. To view the service request history, tap **SR History**.  
The SR History screen opens. Use this screen to view the service request history. See "Viewing Service Request History", page 2-42 for a complete description of this procedure.

### **Viewing a Service Request Attachment:**

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

1. Navigate to the SR screen.

See "Viewing and Changing Service Request Information", page 2-34 for a complete description of this procedure.

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

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

#### **Attachments For Task**

U	Attachment	Type	Description
	the equipme...	Short ...	the equip...
	www.oracle.c...	Web ...	web site
	ppc.gif	File	new file

3. Tap the file that you want to open.

The selected file opens.

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

### **Viewing Contract Information:**

Before performing a job, a field service technician should have as many details about the customer and task as possible. Part of these details is the contractual information. The field service technician uses this information to determine the following:

- Customer entitlements

- Service coverage

Complete the following steps to view contract information:

1. Navigate to the SR screen.

See "Viewing and Changing Service Request Information", page 2-34 for a complete description of this procedure.

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

The Contract screen opens.

### Contract

Name	Amount	%
Loaner	100000	70
Install	100000	50
Expense	100000	0
Labor Transaction	100000	25
Return Loaner	100000	40
Return for Repair	100000	60

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

Read-only Fields	Description
Number	The number of the contract.
Description	The name of the contract.
Start Date	The date the contract begins.
End Date	The date the contract ends.

Read-only Fields	Description
Entitlements table	Describes the benefits of the contract, how much monetary coverage is provided for each benefit, and the percentage of coverage for each benefit.

3. To change the business process, open the Process drop-down list and make the appropriate selection.
4. To see contract coverage details, tap View Contract Details to display a screen that shows-- among other information-- coverage name, covered times, reaction times, and resolution times.
5. In the lower portion of the Contract screen, tap the note icon to view or add a contract note.  
See Creating and Viewing a Note, page 2-48 for a complete description of this procedure.
6. Tap the complete icon in the lower portion of the screen to save any changes and return to the Task screen.

#### **Viewing All Tasks for a Service Request:**

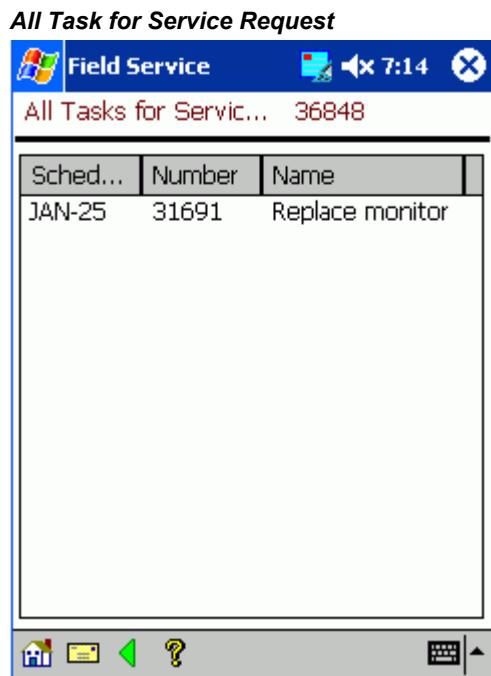
Complete the following steps to view all the tasks associated with a service request:

1. Navigate to the SR screen.

See "Viewing and Changing Service Request Information", page 2-34 for a complete description of this procedure.

2. Tap All Tasks.

The All Tasks for Service Request screen opens.



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

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

The Task screen opens. See [Viewing and Changing Task Information, page 2-17](#) for a complete description of this screen.

4. Tap the global arrow icon in the lower portion of the Task List screen to return to the SR screen. See [Using Global Functionality, page 2-7](#) for complete details.

### **Viewing Service Request History:**

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

Complete the following steps to view service request history:

1. Navigate to the SR screen.

See "Viewing and Changing Service Request Information", page 2-34 for a complete description of this procedure.

2. Tap **SR History**.

The SR History screen opens.

**Service Request History**



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

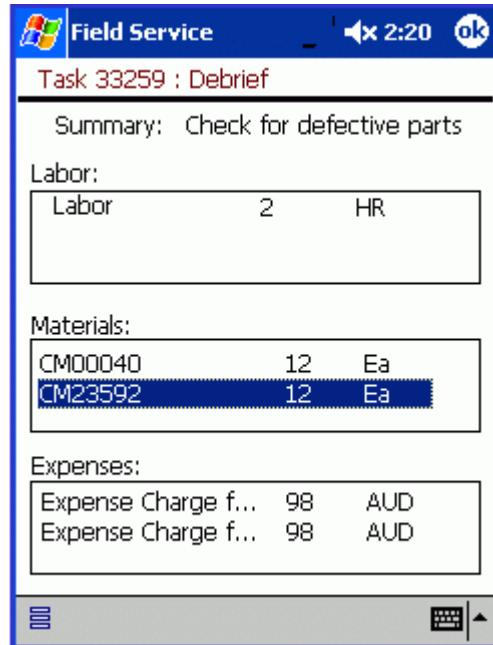
Read-only Fields	Description
Summary	A brief description of the service request.
Intake Date	The date that the service request was taken.
Type	The service request type.
Severity	The level of severity for the service request.
Problem	The problem to be fixed.
Resolution	The state of the service request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

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

3. To change the service request number, make the appropriate selection from the SR Number drop-down list.
4. Tap the task in the Tasks table to learn more about the task.

The Task Debrief screen opens, displaying read-only debrief information about the selected task. For additional details about this screen and how to view reports, see "Debrief Reporting", page 2-55.

#### **Task Debrief**



5. In the Task Debrief screen, tap **OK** in the upper right corner near the time. Oracle Mobile Field Service Store and Forward - Pocket PC returns you to the SR History screen.

## **Creating a Service Request:**

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

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

Complete the following steps to create a service request:

1. Navigate to the Customer screen.

See "Viewing Customer Information", page 2-86 for a complete description of this procedure.

2. Tap **Create SR**.

The Create Service Request screen opens.

### **Create Service Request**

3. In the Summary field, enter a brief description for the service request.
4. Tap Find near the Item field to select a serviceable item.

**Note:** To specify a serviceable item, you can either complete the

Item and Instance fields or simply complete the Instance field.  
Specifying the Instance field automatically completes the Item field.

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



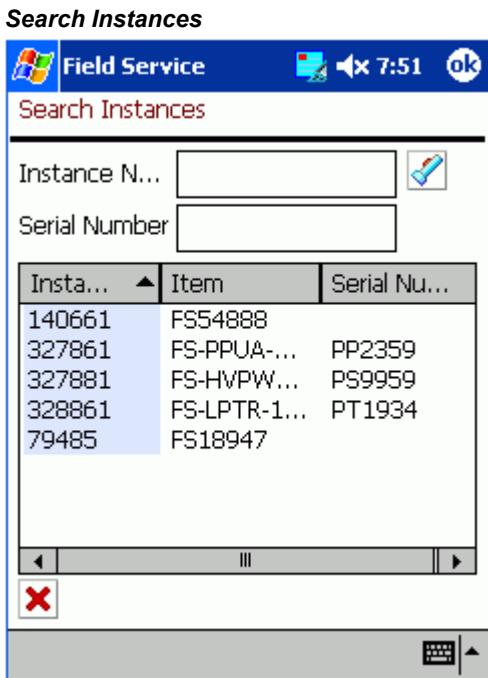
5. Tap the desired item.

Oracle Mobile Field Service Store and Forward - Pocket PC returns you to the Create SR screen.

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

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

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



7. Tap the desired item.

Oracle Mobile Field Service Store and Forward - Pocket PC returns you to the Create SR screen.

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

8. In the Create SR screen, enter the customer purchase order in the Customer PO field.
9. From the Severity drop-down list, select service request severity.
10. From the Status drop-down list, select service request status.
11. From the Type drop-down list, select the service request type.
12. From the Problem drop-down list, select the service request problem.
13. Tap **OK** to save the service request.

Tap **Cancel** to return to the Customer screen without saving the service request. See "Viewing Customer Information", page 2-86 for a complete description of the Customer screen.

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

### **Copying a Service Request:**

You can copy a service request. Perform the following steps to copy a service request.

1. Navigate to the Update Service Request screen.

2. Tap Copy SR.

The application can validate whether this customer has any open tasks for the site. If the profile CSF: Restrict Service Request Creation to Scheduled Sites is set to Yes, then the application checks for open, or working, tasks for that customer site. If the profile value is set to No, then technicians can copy any service request.

Tasks with check boxes cleared for statuses Closed, Canceled, Completed, On Hold, or Rejected are considered to be open. If the profile is set to Yes and no task exists with an open working status, then the Copy SR button is disabled.

If the validation permits, then the Copy Service Request screen appears, and the information is copied to the new service request.

3. Make the necessary updates.

You can enter free-form values for Serial Number and Instance Number. If you enter a free-form number that is not already downloaded to your device, then the number is validated by Enterprise Install Base during synchronization.

4. Tap Apply to save the new service request.

## **Accessing the Knowledge Base**

Through integration with Oracle Mobile Field Service Wireless, you can access the knowledge base from that application. The following instructions are from the Wireless text. After following them and completing your work, tap X in the upper right-hand corner of the screen to return to the native screens of the Pocket PC. See Accessing the Knowledge Base, page 6-54 from the Wireless application.

## **Creating and Viewing a Note**

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

You can create and view notes for the following:

- Service request
- Task
- Customer

- Customer product
- Contract

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

A note includes the following:

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

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

### **Steps:**

Complete the following steps to view or add a note:

1. Navigate to the appropriate screen.
  - For a service request note, navigate to the SR screen.  
See "Viewing and Changing Service Request Information", page 2-34 for a complete description of this procedure.
  - For a task note, navigate to the Task screen.  
See "Viewing and Changing Task Information", page 2-17 for a complete description of this procedure.
  - For a customer note, navigate to the Customer screen.  
See "Viewing Customer Product Information", page 2-91 for a complete description of this procedure.
  - For a customer product note, navigate to the Customer Product screen.  
See "Viewing Customer Product Information", page 2-91 for a complete description of this procedure.

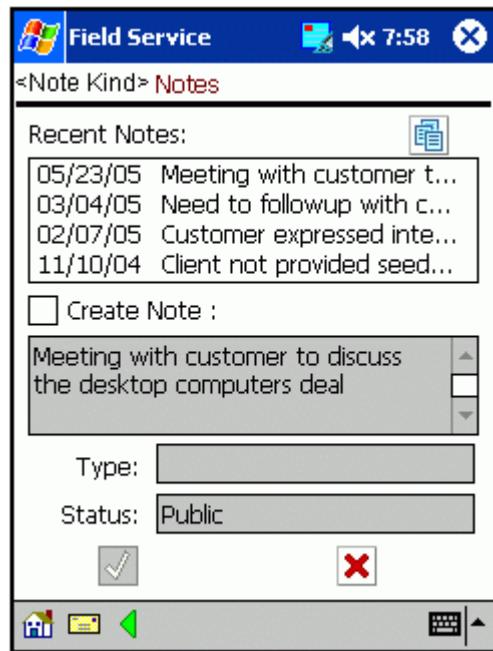
- For a contract note, navigate to the Contract screen.

See "Viewing Contract Information", page 2-39 for a complete description of this procedure.

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

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

### Notes



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

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

4. Enter the note text in the note field.
5. If you are not satisfied with the default note type, then make the appropriate selection from the Type drop-down list.
6. If you are not satisfied with the default note status, then make the appropriate selection from the Status drop-down list.
7. Tap OK.

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

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

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

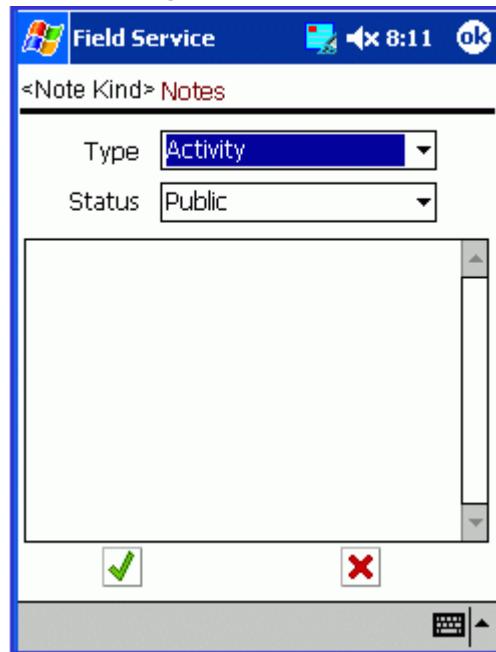
#### Notes - Show All

Date	Note
05/23/05	Meeting with customer t...
03/04/05	Need to followup with c...
02/07/05	Customer expressed inte...
11/10/04	Client not provided seed...
09/06/04	Web Callback Request: ...
12/19/03	Web Callback Request: ...
12/17/03	1 ppc 17-dec-2003
08/04/03	Mr. Beaulie indicated tha...
01/28/03	Request for product cat...
01/28/03	Requesting for software ...
01/28/03	Checking on service req...
01/28/03	Request for product info...

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

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

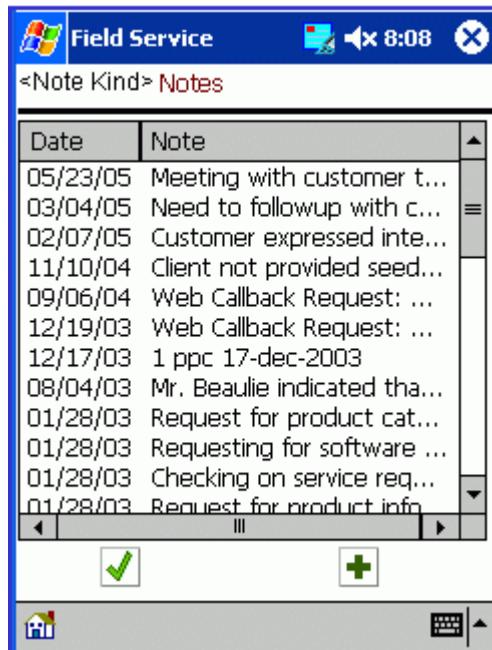
### Notes - Adding



10. If you are not satisfied with the default note type, then make the appropriate selection from the Type drop-down list.
11. If you are not satisfied with the default note status, then make the appropriate selection from the Status drop-down list.
12. Enter the note text in the note field.
13. Tap **Save**.

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

### Notes - Show All



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

Tap **Add** to add another note.

## Executing a Mobile Query

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

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

### Prerequisites

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

### Steps:

1. Tap the Mobile Query icon in the icon region.

The Mobile Queries screen appears.

2. Either tap a seeded query from the Query List LOV or tap an already saved query from the Query Name field.

3. Advance to the next screen, Submit Mobile Query.

A detailed description of the selected query appears in the Desc field. Then the cursor moves to the first query variable required.

4. Enter values for query variables until no more are required.

5. Tap the synchronize icon to transmit your query.

When the enterprise has responded, a message appears in the Mobile Query Instances screen that says that a reply is available.

6. Tap the reply to display it in the mobile query results screen.

For more information, refer Defining and Editing Mobile Queries, *Oracle Mobile Field Service Implementation Guide*, Oracle Mobile Field Service Implementation Guide.

## Performing a Part Search

Through integration with Oracle Mobile Field Service Wireless, you can access the part search from that application. For a conceptual overview of part searching, see Performing a Part Search, page 6-37 from the Wireless application.

## Using Radius Search

Through integration with Oracle Mobile Field Service Wireless, you can access the part search from that application. The following instructions are from the Wireless text.

After following them and completing your work, tap X in the upper right-hand corner of the screen to return to the native screens of the Pocket PC. See Using Radius Search, page 6-37 from the Wireless application.

## Ordering Parts

Through integration with Oracle Mobile Field Service Wireless, you can order parts from that application. The following instructions are from the Wireless text. After following them and completing your work, tap X in the upper right-hand corner of the screen to return to the native screens of the Pocket PC. See Ordering Parts, page 6-42 from the Wireless application.

## Receiving Parts

Through integration with Oracle Mobile Field Service Wireless, you can receive parts from that application. The following instructions are from the Wireless text. After following them and completing your work, tap X in the upper right-hand corner of the screen to return to the native screens of the Pocket PC. See Receiving Parts, page 6-46 from the Wireless application.

## Getting Driving Directions

Through integration with Oracle Mobile Field Service Wireless, you can get driving directions from that application. The following instructions are from the Wireless text. After following them and completing your work, tap X in the upper right-hand corner of the screen to return to the native screens of the Pocket PC.

**To get driving directions:**

### Steps:

1. Tap the Get Direction icon from the toolbar.

The Driving Direction screen appears and contains a list of addresses from all the tasks that are scheduled for the system date.

2. Enter the starting address:

- Tap a link in the list to select it.
- Tap Work Address for help to select the work address.
- Tap Other to type in the starting address.

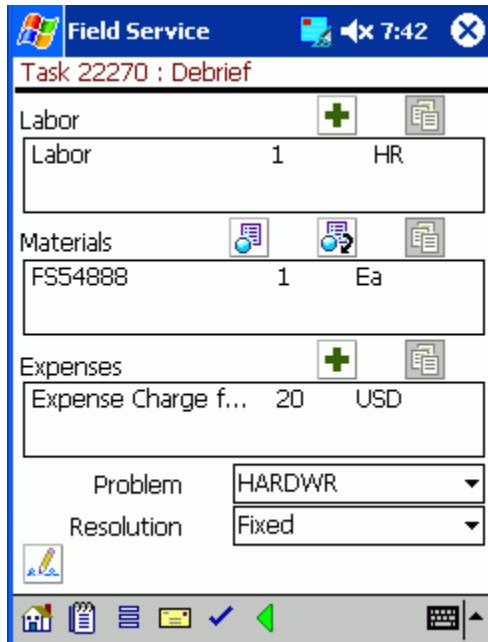
3. Enter the destination address by following a parallel procedure to that in step 2.

4. Tap OK.

The Driving Direction screen displays written directions and an associated map.

## Performing Debrief Reporting

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



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

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

The Debrief screen is where you specify the task problem and resolution. The default problem description is **Electrical Problem**, and the default resolution description is **Solution to Software**. In the Labor region, tapping the travel debrief "right arrow" icon displays default travel lines, and tapping the labor debrief "plus" icon displays default travel lines. These last two defaults are drawn from task assignment status change history.

Complete the following steps to change this information.

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

### **Creating a Labor Report Item:**

You create labor report items to describe how much labor time was involved in the completion of a task. Oracle Mobile Field Service Store and Forward - Pocket PC

enables you to add labor report items regardless of the task status. The application also can enforce mandatory labor debrief by which you cannot complete or close a task until you create a labor line.

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

The Task screen opens. See "Viewing and Changing Task Information", page 2-17 for a complete description of this screen.

2. Tap **Debrief**.

The Debrief screen opens. See "Debrief Reporting", page 2-55 for a description of this screen.

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

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

To ensure complete, accurate, and faster reporting, the travel and labor debrief line start and end times are taken from the Task Assignment Status changes.

For example,

- The Travel Start Time is set by default when the technician changes the task assignment status to Travel status (a status with "Travel" flag enabled).
- The default Travel End Time is set by default when the technician changes the task assignment status from Travel (a status with "Travel" flag enabled) to any other status (status with "Travel" flag not enabled).
- Similarly, the Labor Start Time and the Labor Start Time are set by default, based on task assignment status changes.

In order to implement this feature, you must set the following profiles:

- CSF: Default Labor Debrief Date/Time
- CSF: Default Service Activity Code for Travel
- CSF: Default Service Activity Code for Labor

For more information, refer to xxx , Oracle Field Service Implementation Guide

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

### Labor Line

Field Service 8:26 ok

Task 22270 : Labor Line

Activity	Regular		
Item	Labor - Labor Charges		
Description	Labor Charges for Service		
Start Time	16	:	0
End Time	17	:	0
Duration	1.00	UOM	Hour
Service D...	01/31/2007 07:39:36		
Justification	Labor - Fix		

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

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

### Select Activity

Field Service 8:29 ok

Select Activity

Activity	Process
Calibrate	Field Service
Diagnose	Field Service
FSCSF_Labor...	FSCSF_field Service
FSCSF_Labor...	Field Service
Labor - Non ...	Field Service
Overtime	Field Service
Regular	Field Service

5. Select a labor activity.

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

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

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

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

See "Using the Date Drop-down List", page 2-16 for complete details.

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

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

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

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

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

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

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

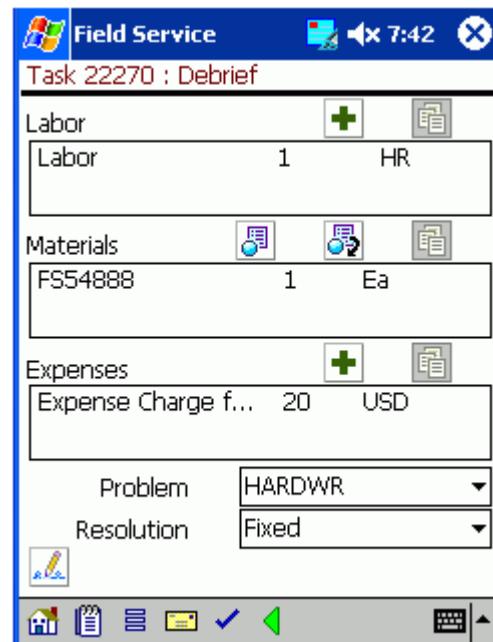
It is not mandatory to complete the Justification drop-down list.

13. Tap **OK**.

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

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

### Debrief



### Deleting a Labor Report Item:

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

#### Prerequisite

- Creating a labor report item. See Creating a Labor Report Item, page 2-56.

Complete the following steps to delete a labor report item:

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

See "Creating a Labor Report Item", page 2-56 for a complete description of this procedure.

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

The Labor Line screen opens.

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

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

### *Labor Line*

Field Service 8:26 ok

Task 22270 : Labor Line

Activity	Regular	<input type="button" value="edit"/>	
Item	Labor - Labor Charges	<input type="button" value="edit"/>	
Description	Labor Charges for Service		
Start Time	16	:	0
End Time	17	:	0
Duration	1.00	UOM	Hour
Service D...	01/31/2007 07:39:36		
Justification	Labor - Fix		

4. Tap **Delete**.
5. Oracle Mobile Field Service Store and Forward - Pocket PC returns you to the Debrief screen where the desired labor report item no longer appears.

### **Creating a Material Report Item:**

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

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

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

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

Complete the following steps to create a material report item:

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

The Task screen opens. See Viewing and Changing Task Information, page 2-17 for a complete description of this screen.

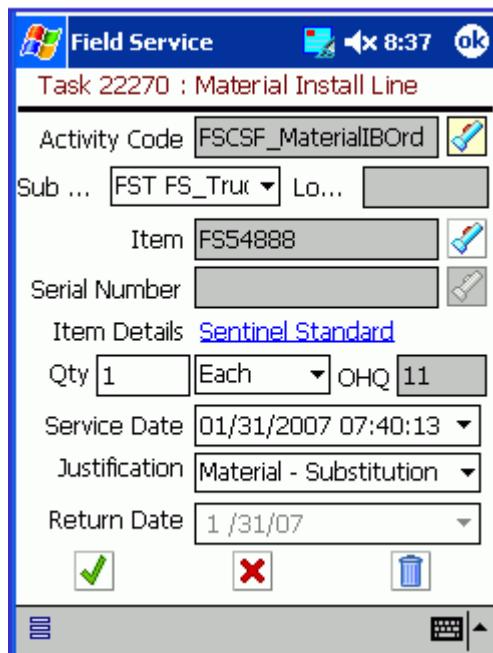
2. Tap **Debrief**.

The Debrief screen opens. See Debrief Reporting, page 2-55 for a description of this screen.

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

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

### *Material Install Line*



The screenshot shows the 'Material Install Line' screen. At the top, it displays 'Field Service' and the time '8:37'. The main title is 'Task 22270 : Material Install Line'. Below the title, there are several input fields: 'Activity Code' with the value 'FSCSF\_MaterialIBOrd' and a pencil icon; 'Sub ...' with a dropdown menu showing 'FST FS\_Truc' and a 'Lo...' option; 'Item' with the value 'FS54888' and a pencil icon; and 'Serial Number' with an empty field and a pencil icon. Under 'Item Details', it says 'Sentinel Standard'. Below these are fields for 'Qty' (1), 'Each', 'OHQ' (11), 'Service Date' (01/31/2007 07:40:13), 'Justification' (Material - Substitution), and 'Return Date' (1/31/07). At the bottom are three buttons: a green checkmark, a red X, and a trash can icon.

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

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

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

## Creating a Regular Material Report Item

Complete the following steps to create a material report item:

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

The Task screen opens. See Viewing and Changing Task Information, page 2-17 for a complete description of this screen.

2. Tap Debrief.

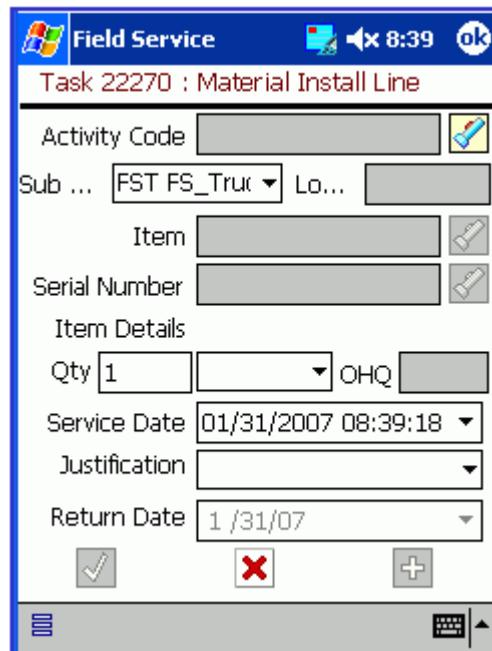
The Debrief screen opens. See Debrief Reporting, page 2-55 for a description of this screen.

3. Tap Install above the Materials field.

The Material Line screen opens with a default inventory type in the In drop-down list. In this example, qamfs\_sub1 is the default inventory type. Also, the Service Date drop-down list contains a default value (the current date).

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

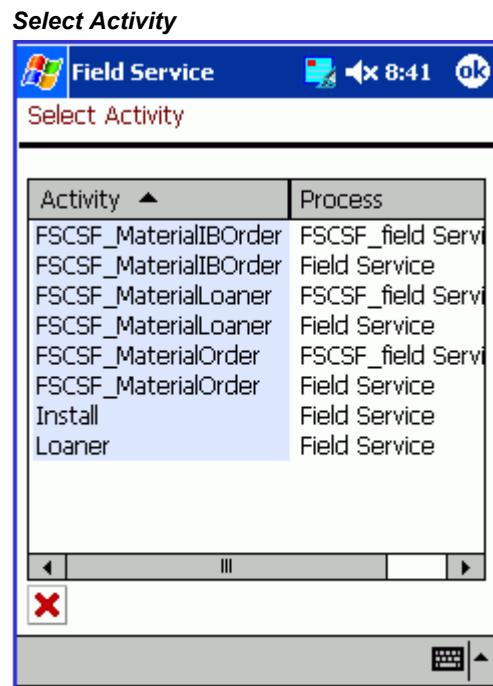
### Material Install Line



The screenshot shows the 'Material Install Line' screen. At the top, it displays 'Field Service' and the time '8:39'. The main title is 'Task 22270 : Material Install Line'. Below the title, there are several input fields: 'Activity Code' (with a flashlight icon), 'Sub ...' (containing 'FST FS\_Truc'), 'Item' (with a pencil icon), and 'Serial Number' (with a pencil icon). Under 'Item Details', there are four fields: 'Qty' (1), 'Service Date' (01/31/2007 08:39:18), 'Justification' (a dropdown menu), and 'Return Date' (1/31/07). At the bottom of the screen are three buttons: a checkmark, a red X, and a plus sign. The bottom right corner features a calendar icon and a small up arrow.

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

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



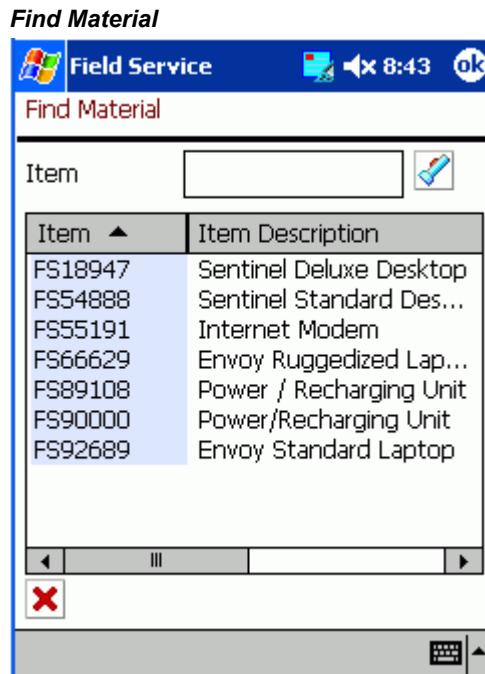
5. Select a material activity.

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

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

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

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



- Select the desired material report item.

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

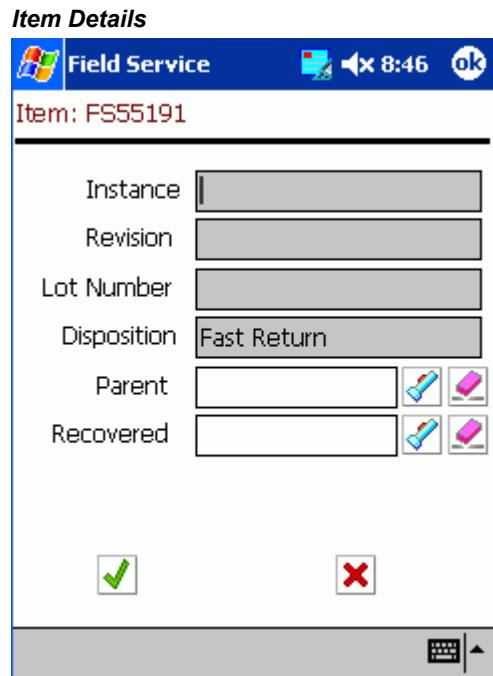
Regardless of the method that you use to select the material report item, Oracle Mobile Field Service Store and Forward - Pocket PC populates the On Hand field and UOM drop-down list of the Material Line screen.

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

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

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

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



10. To change the default unit of measure, make the appropriate selection from the UOM drop-down list.
11. To change the default service date, make the appropriate selection from the Service Date drop-down list.  
See Using the Date Drop-down List, page 2-16 for a complete description of this procedure.
12. From the Justification drop-down list, make a selection that best describes the justification for the material report item usage.  
It is not mandatory that you select a justification.
13. Tap **OK**.

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

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

### **Creating a Material Report Item for a Return**

Complete the following steps to create a material report item:

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

The Task screen opens. See Viewing and Changing Task Information, page 2-17 for a complete description of this screen.

2. Tap **Debrief**.

The Debrief screen opens. See Debrief Reporting, page 2-55 for a description of this screen.

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

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

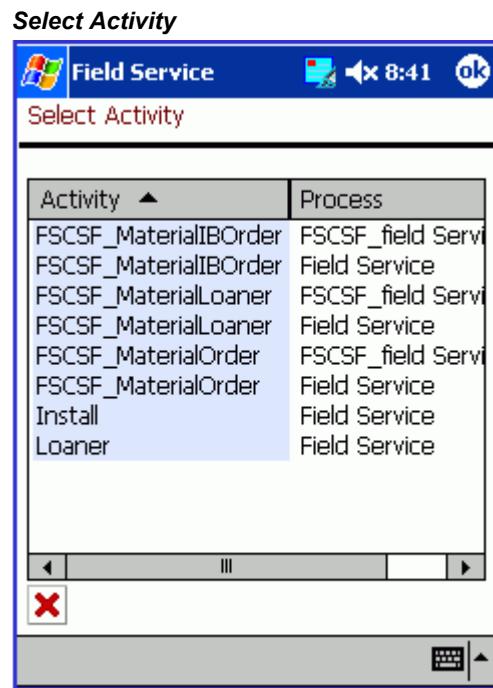
**Material Return Line**



The screenshot shows the 'Material Return Line' screen. At the top, there are fields for 'Activity Code' (with a pencil icon), 'Inv' (set to 'D2 DF Truck') and 'Loc' (with a dropdown arrow). Below these are fields for 'Item' and 'Instance' (both with pencil icons). The next section is 'Item Details' with fields for 'Quantity' (set to 1), 'Return' (set to 'Accounts Receivables E'), 'Justification' (set to 'Material - Broken'), and 'Service Date' (set to '01/31/2007 08:47:18'). At the bottom are three buttons: a checkmark icon, a red X icon, and a plus sign icon. The bottom of the screen has a toolbar with a list icon, a calendar icon, and a search icon.

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

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

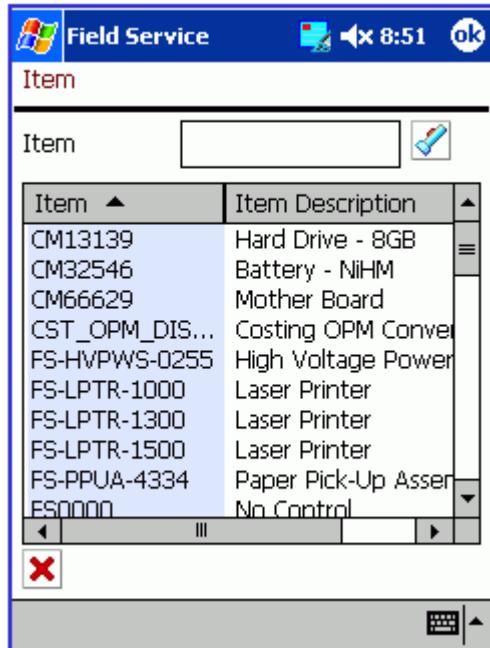


5. Select a material activity.

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

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

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

**Item**

7. Select the desired material report item.

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

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

### Material Return Line

Field Service 8:52 ok

Task 22270 : Material Return Line

Activity Code FSCSF\_Material Retur

Inv D2 DF Truck Loc

Item CM66629

Instance

Item Details Mother Board

Quantity 1 Each

Return Accounts Receivables E

Justification Material - Broken

Service Date 01/31/2007 08:47:18

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

The Instance screen opens.

*Instance*

Item	Description	Instance
FS54888	Sentinel...	140661

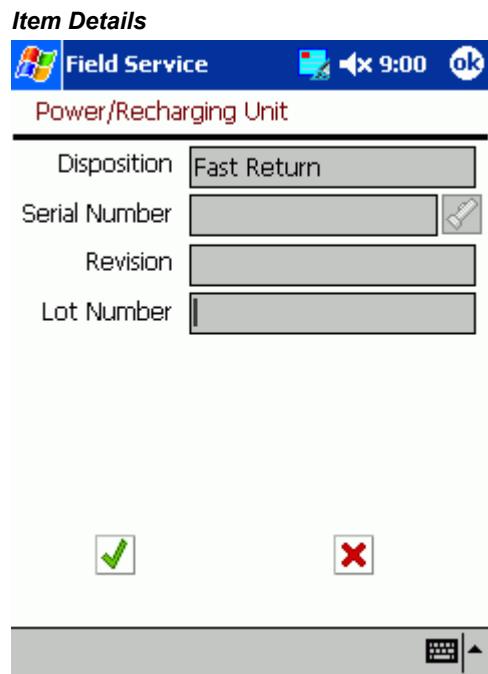
9. Select the appropriate item instance.

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

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

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

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



11. In the Serial Number field and Revision field, enter the appropriate information and then tap **OK**.
12. In the Material screen, enter the number of items needed in the Quantity field. If the item is serialized, then 1 appears in the Quantity field. Change this value if it is not correct.
13. To change any default information in the Material screen, make the desired selection from the appropriate drop-down list.
14. Tap **OK**.

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

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

#### **Deleting a Material Report Item:**

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

Complete the following steps to delete a material report item:

#### **Prerequisite**

Creating a material report item. See "Creating a Material Report Item", page 2-61.

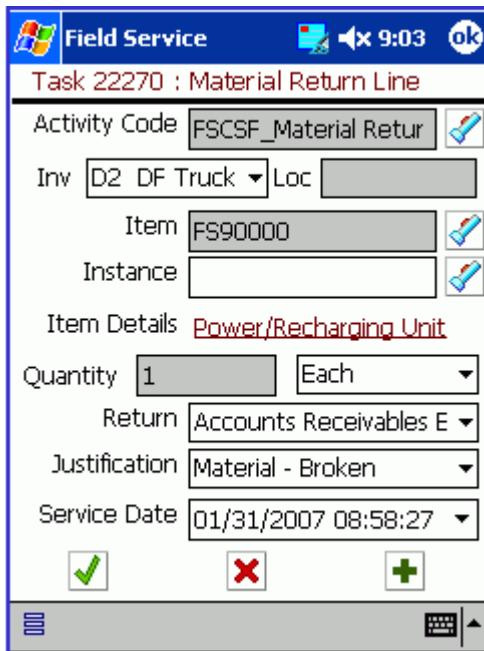
1. For a desired task, navigate to the Debrief screen.

See "Creating a Material Report Item", page 2-61 for a complete description of this procedure.

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

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

#### **Material Return Line**



Field Service 9:03 ok

Task 22270 : Material Return Line

Activity Code FSCSF\_Material Retur

Inv D2 DF Truck Loc

Item FS90000

Instance

Item Details Power/Recharging Unit

Quantity 1 Each

Return Accounts Receivables E

Justification Material - Broken

Service Date 01/31/2007 08:58:27

✓ ✘ +

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

3. Tap **Delete**.

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

#### **Creating an Expense Report Item:**

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

Complete the following steps to create an expense report:

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

The Task screen opens. See "Viewing and Changing Task Information", page 2-17 for a complete description of this screen.

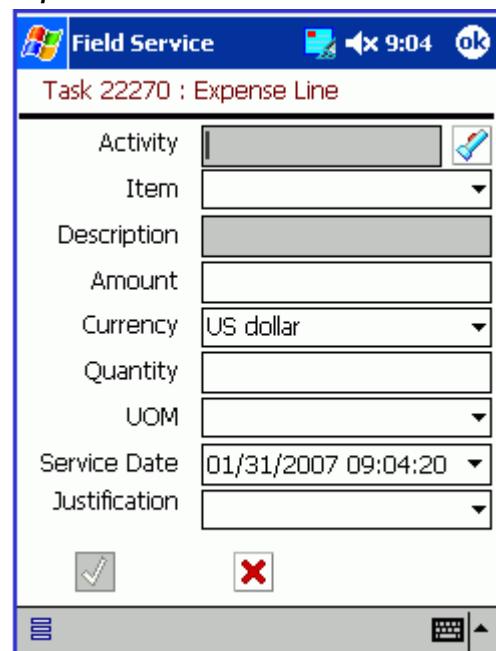
2. Tap **Debrief**.

The Debrief screen opens. See "Debrief Reporting", page 2-55 for a description of this screen.

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

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

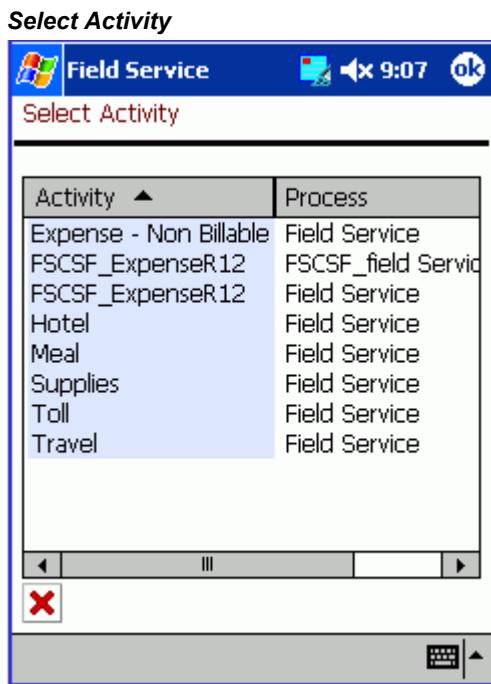
#### **Expense Line**



The screenshot shows the 'Expense Line' screen. At the top, it displays 'Field Service' and the time '9:04'. Below the title 'Task 22270 : Expense Line', there is a list of fields with input boxes: Activity, Item, Description, Amount, Currency (set to 'US dollar'), Quantity, UOM, Service Date (set to '01/31/2007 09:04:20'), and Justification. At the bottom of the screen are two buttons: a checkmark icon on the left and a red X icon on the right. At the very bottom are standard mobile navigation icons for back, forward, and search.

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

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



5. Select an expense activity.

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

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

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

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

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

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

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

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

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

justification for the expense report item.

It is not mandatory to enter a justification.

**13. Tap **OK**.**

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

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

**Deleting an Expense Report Item:**

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

**Prerequisite**

- Creating an expense report item. See "Creating an Expense Report Item", page 2-73.

Complete the following steps to delete a expense report item:

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

See "Creating a Material Report Item", page 2-61 for a complete description of this procedure.

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

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

### Expense Line

Field Service 9:09 ok

Task 22270 : Expense Line

Activity	Travel	
Item	Expense - Expense Cha	
Description	Expense Charge for Servi	
Amount	20	
Currency	US dollar	
Quantity		
UOM	Dollars	
Service Date	01/31/2007 07:41:00	
Justification	Expense - Fix	

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

3. Tap **Delete**.

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

## Obtaining an Electronic Signature

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

### Steps:

Complete the following steps to obtain an electronic signature:

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

The Task screen opens. See "Viewing and Changing Task Information", page 2-17 for a complete description of this screen.

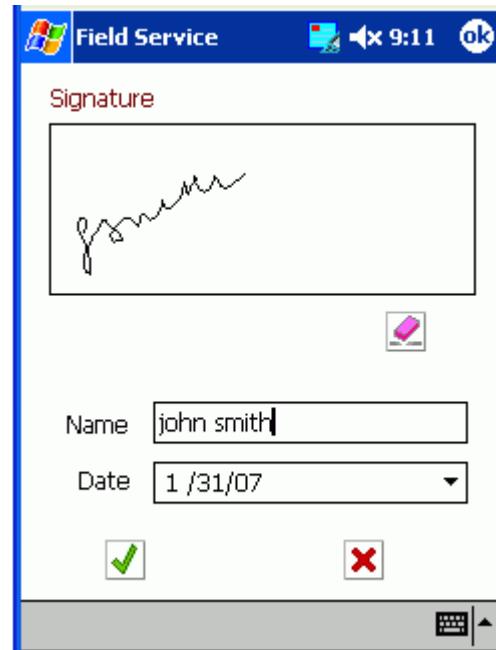
2. Tap **Debrief**.

The Debrief screen opens. See "Debrief Reporting", page 2-55 for a description of this screen.

3. Tap **Sign**.

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

**Signature**



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

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

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

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

See Using the Date Drop-down List, page 2-16 for a complete description of this procedure.

7. Tap **OK**.

Oracle Mobile Field Service Store and Forward - Pocket PC returns to the Debrief screen.

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

## Counter Readings

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

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

A counter reading consists of the following:

- Name
- Time stamp
- Value
- Unit of measure

### **Creating a New Counter Reading:**

Complete the following steps to set a counter reading:

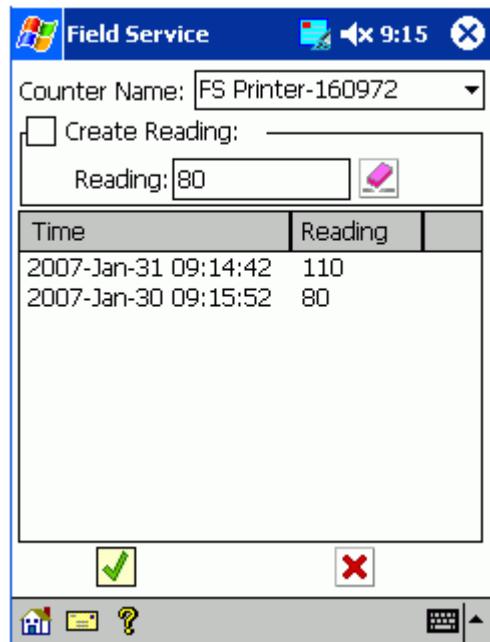
1. Navigate to the Task List screen and tap the desired task.

The Task screen opens. See "Viewing and Changing Task Information", page 2-17 for a complete description of this screen.

2. Tap **Counters**.

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

### Counters



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

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

4. Select the Create Reading check box.

The Reading field is available.

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

The counter reading appears in the table.

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

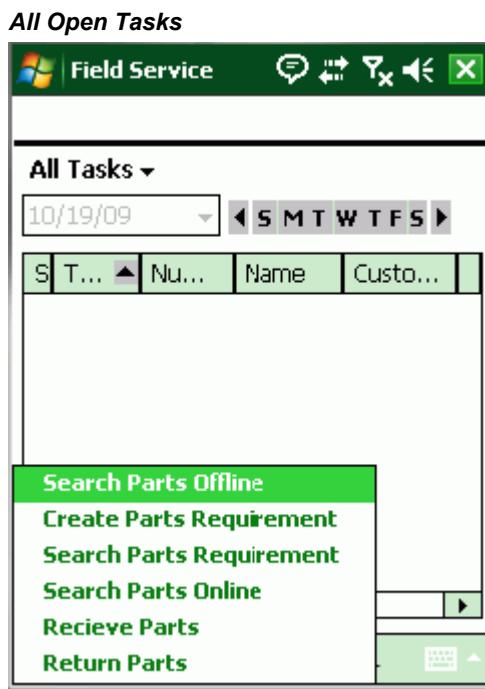
## Managing Spare Parts

Spare parts management includes creating a parts requirement, searching parts online, receive parts, return parts, and viewing the parts requirement status.

### **Creating a Parts Requirement:**

Complete the following steps to order a part:

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



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

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

## **Create Parts Requirement**

Task	<input type="text"/>
Item	<input type="text"/> 
Item Description	<input type="text"/>
Quantity	<input type="text"/>
UOM	<input type="text"/> 
Destination Su...	FST FS_Truck7 
Ship To	455 Leavenwort  
Need By	01/30/2007 09:24:0 

3. Tap the **Item** flashlight icon.  
The Parts Search window opens.

Search Items

Field Service

Search Items

Item	<input type="text"/>	<input checked="" type="checkbox"/>
Item Descri...	<input type="text"/>	
Item	Item Description	▲
CM13139	Hard Drive - 8GB	≡
CM32546	Battery - NiHM	≡
CM66629	Mother Board	≡
CST_OPM_...	Costing OPM Converger	≡
FS-HVPWS...	High Voltage Power Su	≡
FS-LPTR-1...	Laser Printer	≡
FS-LPTR-1...	Laser Printer	≡
FS-LPTR-1...	Laser Printer	≡
<input type="button" value="◀"/>	☰	<input type="button" value="▶"/>
<input checked="" type="checkbox"/>		

4. Select the desired part from the table.

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

The part you select appears in the New Order screen.

**Create Parts Requirement**

Field Service    9:27    ok

Create Parts Requirement

Task	
Item	CM32546 <input type="button" value="edit"/>
Item Description	Battery - NiHM
Quantity	1
UOM	Each
Destination Su...	FST FS_Truck7
Ship To	455 Leavenwort <input type="button" value="edit"/>
Need By	01/30/2007 09:26:5

5. Tap Order.

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

6. Tap OK in the prompt.

The part you selected is added to the part order. Oracle Mobile Field Service Store and Forward - Pocket PC enables you to check the status of this order. See "Viewing Parts Requirement Status", page 2-83 for a complete description of this procedure.

#### **Viewing Parts Requirement Status:**

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

Complete the following steps to view a parts requirement status:

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

The View Order screen opens.



2. To change the requirement number, make the appropriate selection from the View Order drop-down list.
3. To see the full shipping address, tap the equal sign (=) button.  
The Address screen opens.
4. Tap **Done** to close the Address screen.
5. Tap **OK** to close the View Order screen.

#### **Viewing On-hand Parts and Quantities:**

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

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

The Search Parts screen opens.

### Search Parts



The Search Parts screen is a mobile application window titled "Search Parts". The top bar shows the "Field Service" logo, the date "9:37", and an "ok" button. The main area contains the following fields:

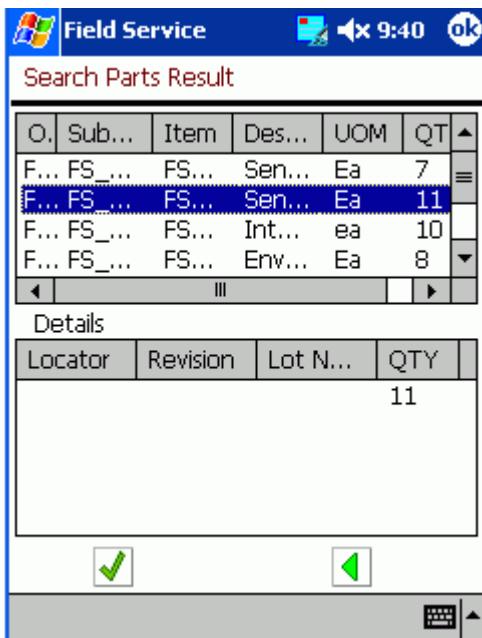
Sub Inventory	FST FS_Truck7
Locator	
Item	
Item Description	
Revision	
Lot From	
Lot To	

At the bottom are two buttons: a green checkmark and a red X. A keyboard icon is in the bottom right corner.

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

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

### Search Parts Result



The Search Parts Result screen is a mobile application window titled "Search Parts Result". The top bar shows the "Field Service" logo, the date "9:40", and an "ok" button. The main area displays a table of search results and a details section.

O	Sub...	Item	Des...	UOM	QT
F...	FS_...	FS...	Sen...	Ea	7
F...	FS_...	FS...	Sen...	Ea	11
F...	FS_...	FS...	Int...	ea	10
F...	FS_...	FS...	Env...	Ea	8

Below the table is a "Details" section with a table:

Locator	Revision	Lot N...	QTY
11			

At the bottom are two green buttons: a checkmark and a left arrow. A keyboard icon is in the bottom right corner.

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

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

### **Search Parts Online:**

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

The Parts Search page appears. This page enables you to search for the parts required to complete a task. The Parts Search page allows you to initiate the parts search, view search results, select source and receive parts.

Refer to the "Overview: Parts Search and Ordering" section in the *Oracle Field Service User Guide* for more information.

2. Search the desired part and then tap **Done**.

### **Receive Parts:**

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

The Receive Parts page appears. This page enables you to select the source and parts in the Search Results page to create an inbound order or reservation automatically.

Refer to the "Overview: Parts Search and Ordering" section in the *Oracle Field Service User Guide* for more information.

2. Tap **Done** to return to the All Tasks page.

### **Return Parts:**

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

The Return Parts page appears. This page displays the Source, Consolidation, and Destination Summary associated with the technicians sub-inventories.

Refer to the "Using Parts Returns" section in the *Oracle Field Service User Guide* for more information.

2. Tap **Done** to return to the All Tasks page.

## **Viewing Customer Information**

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

- Name

- Contact
- Address
- Phone number

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

**Steps:**

Complete the following steps to view customer information:

1. Open the Customer screen.

*To Open the Customer Screen from within a Task:*

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

The Task screen opens. See "Viewing and Changing Task Information", page 2-17 for a complete description of this screen.

2. Tap the Customer field.

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



*To Open the Customer Screen with no Task Open:*

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

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

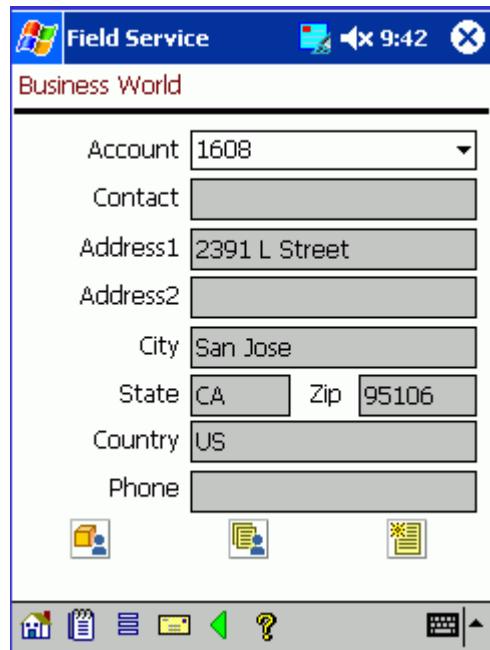
**Search Customers**



2. Tap the desired customer.

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

**Customer**



Field Service 9:42 X

Business World

Account: 1608

Contact:

Address1: 2391 L Street

Address2:

City: San Jose

State: CA Zip: 95106

Country: US

Phone:

Icons: Person, Document, Star

Navigation: Home, Back, Forward, Help, Keyboard

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

The Party Information screen opens.

### Party Information



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

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

**3. Tap OK.**

Oracle Mobile Field Service Store and Forward - Pocket PC returns you to the Customer screen.

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

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

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

See "Creating and Viewing a Note", page 2-48 for a complete description of this procedure.

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

The All Products screen opens. In this screen, you can search for a customer

product and then receive details about this product. See "Viewing Customer Product Information", page 2-91 for a complete description of this procedure.

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

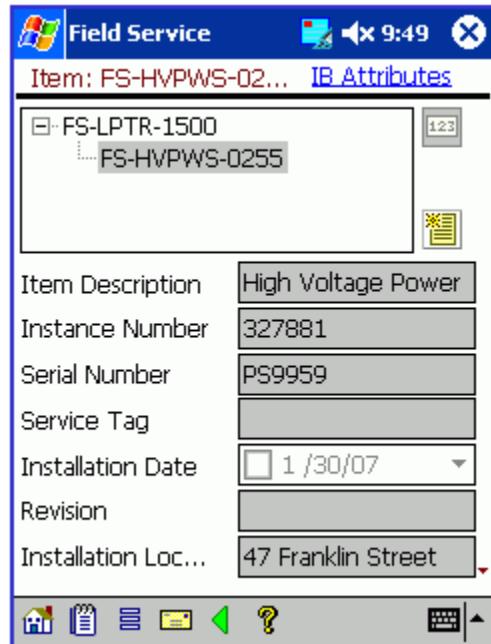
The All SRs screen opens. In this screen, you can view all the service requests for a customer. See "Viewing All Tasks for a Service Request", page 2-41 for a complete description of this procedure.

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

The Create SR screen opens. In this screen, you create a service request by specifying various information. See "Creating a Service Request", page 2-45 for a complete description of this procedure.

## Viewing Customer Product Information

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



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

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

### **Viewing and Changing a Customer Product for a Task:**

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

1. Navigate to the SR screen.

See "Viewing and Changing Service Request Information", page 2-34 for a complete description of this procedure.

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

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

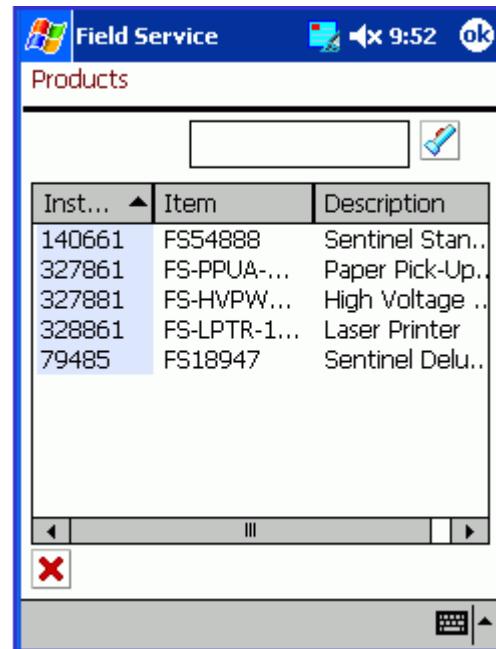
3. Tap the left arrow icon to return to the SR screen.

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

The Products screen opens. This screen lists in a table all the possible customer's

products, with the instance, name, and description provided.

### **Products**



5. Tap the desired customer product.

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

### **Viewing All Products for a Customer:**

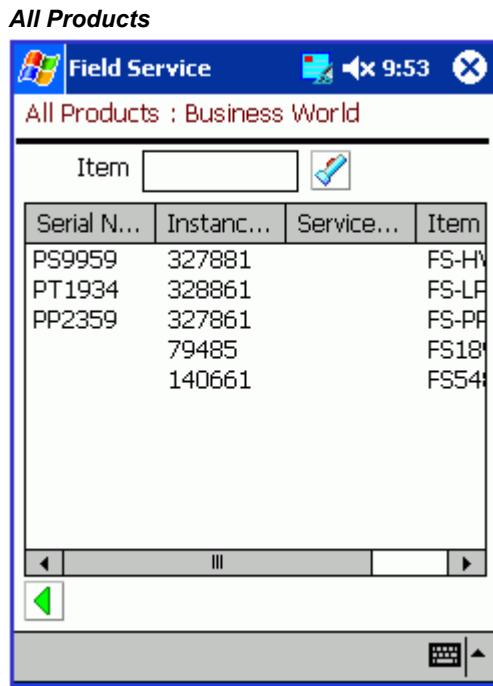
Complete the following steps to view customer product information:

1. Navigate to the Customer screen.

See "Viewing Customer Information", page 2-86 for a complete description of this procedure.

2. Tap **Products**.

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



3. Select the desired customer product.

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

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

## Using Messaging

This section describes how you can use messaging in the Oracle Mobile Field Service Store and Forward - Pocket PC application.

### **Messaging Functionality:**

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

- It can be used to send messages to all field service users, or to members of a group to which the field service technician is a member.
- You can use this function to ask for support or to request additional information. For example, you can also use messages to request new parts.

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

(outbox view).

### **Reading, Sending, and Deleting Messages:**

This section describes how to do the following:

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

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

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

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



2. Select the message that you want to read.

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

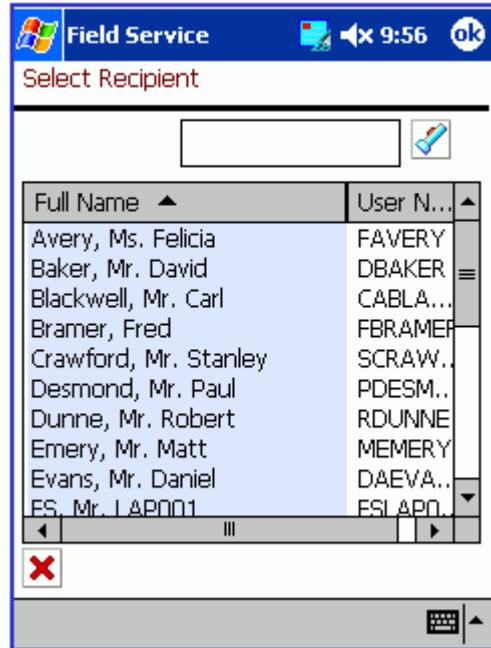
3. To delete this message, tap **Delete**.
4. To create a new message, select the New Mail check box.

The user name appears in the From field.

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

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

### Select Recipient



The screenshot shows a table with two columns: 'Full Name' and 'User N...'. The 'Full Name' column lists names like Avery, Ms. Felicia, Baker, Mr. David, Blackwell, Mr. Carl, Bramer, Fred, Crawford, Mr. Stanley, Desmond, Mr. Paul, Dunne, Mr. Robert, Emery, Mr. Matt, Evans, Mr. Daniel, and FS, Mr. LAP001. The 'User N...' column lists corresponding abbreviations. The table has a header row with arrows for sorting. At the bottom of the table, there are navigation buttons for 'Previous', 'Next', and 'Last'. Below the table is a red 'X' button and a navigation bar with icons for back, forward, and search.

Full Name	User N...
Avery, Ms. Felicia	FAVERY
Baker, Mr. David	DBAKER
Blackwell, Mr. Carl	CABLA...
Bramer, Fred	FBRAMER
Crawford, Mr. Stanley	SCRAW..
Desmond, Mr. Paul	PDESM..
Dunne, Mr. Robert	RDUNNE
Emery, Mr. Matt	MEMORY
Evans, Mr. Daniel	DAEVA...
FS, Mr. LAP001	FSI APN..

6. Select the recipient from the table.

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

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

The message is sent to the recipient.

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

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

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

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

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

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

## Automatically Synchronizing with the Enterprise System

The application provides automatic synchronization based on three types of changes:

- Instantaneous automatic synchronization

This term is used to refer the Automatic Synchronization process based on data change in a client or enterprise.

- Timer based automatic synchronization

This term is used to refer the Automatic Synchronization process based on a timer.

- Exception event based automatic synchronization

This term is used to refer the automatic synchronization process based on exception events. Only an administrator can set up exception events.

## Prerequisites

- An administrator must set up synchronization based on exception events. For more information, see "Using the Oracle10g Lite Administration Screens" in the *Oracle Mobile Service Implementation Guide*.

### To Establish Automatic Synchronization:

Establishing automatic synchronization has steps that are specific to each type of the three types, instantaneous, timer based, or event based.

#### To establish instantaneous automatic synchronization

Automatic synchronization is initiated instantaneously to reflect the latest changes in the key service objects such as service request attributes and task attributes in the enterprise or a mobile device. Automatic synchronization is initiated instantaneously when changes occur in key inventory objects such as inventory item attributes and organization attributes in the enterprise application.

1. Set the profile value of CSM: Automatic Synchronization Interval for Data Download to 0 (zero) to initiate instantaneous automatic synchronization from the server.
2. Set the profile value of CSM: Automatic Synchronization Interval for Data Upload to 0 (zero) to initiate instantaneous automatic synchronization from the client.

**Note:** Device Manager never initiates automatic synchronization

from the client if the profile CSM: Automatic Synchronization Interval for Data Upload is set to a negative integer. In this situation, you must initiate the synchronization manually by tapping or clicking the synchronization icon located in the client application.

#### **To establish timer based automatic synchronization**

3. Set the profile value of CSM: Automatic Synchronization Interval for Data Download to a positive integer to initiate automatic synchronization from the server in a specific time interval.
4. Set the profile value of CSM: Automatic Synchronization Interval for Data Upload to a positive integer to initiate automatic synchronization from the server in a specific time interval.

**Note:** Your mobile device also checks the setup for time interval or specific time on any day and initiates automatic synchronization based on this platform-level setup.

## **Manually Synchronizing with the Enterprise System**

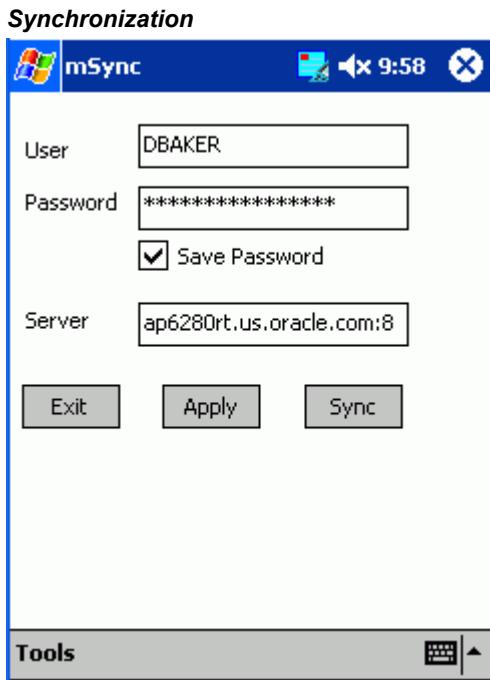
To receive new data assigned to you, such as new tasks and service requests, you need to synchronize with the enterprise system. Likewise, to send the changes that you have made, such as creating report items and updating task statuses, you need to synchronize with the enterprise system. Usually you can set up automatic synchronization, but there are times when you need a manual procedure.

#### **Steps:**

Complete the steps below to synchronize Oracle Mobile Field Service Store and Forward - Pocket PC with the enterprise system.

1. Establish a network connection for your Pocket PC.
2. Tap the synchronization icon near the bottom of the Task List screen.

The synchronization screen opens.



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

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

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

4. Tap **Sync**.

Information from your Pocket PC and enterprise system synchronize.

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

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

## Changing Passwords

Through integration with Oracle Mobile Field Service Wireless, you can change passwords from that application. The following instructions are from the Wireless text. After following them and completing your work, tap X in the upper right-hand corner of the screen to return to the native screens of the Pocket PC. See Changing Passwords, page 6-57 from the Wireless application.

## Closing the Application

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

### Prerequisites

- Save all data and be ready to exit the application.

### Steps:

Complete the following to logout of Oracle Mobile Field Service Store and Forward - Pocket PC:

1. In the lower portion of the Task List screen, click the Exit icon from the tool bar. Oracle Mobile Field Service Store and Forward - Pocket PC checks that all data has been saved correctly and then closes. The Pocket PC returns to the Pocket PC desktop where all the applications are listed.

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# Using Oracle Mobile Field Service Store and Forward - Laptop Technicians Dashboard

This chapter covers the following topics:

- Introduction
- Launching and Synchronizing Oracle Mobile Field Service Store and Forward - Laptop
- Understanding the Field Service Technician Dashboard
- Using Simple Search and Advanced Search
- Assigning Unassigned Tasks to Technicians
- Viewing and Opening Tasks
- Performing Debrief
- Setting Counters and Counter Properties
- Creating and Viewing Notes
- Ordering Parts for a Specific Task
- Ordering Parts for Trunk Stock
- Viewing Parts Order Details
- Transferring Parts Between Sub-Inventories
- Viewing the Technicians Calendar
- Creating a Personal Task
- Creating Service Requests
- Viewing Customer Information
- Viewing Install Base Information
- Viewing and Sending Messages
- Viewing Contract Information

- Viewing Service History
- Viewing and Changing Service Request Information
- Understanding Task Creation
- Creating a Task Based on an Existing Task
- Creating a Task Based on an Existing Service Request
- Viewing a Service Request Attachment
- Uploading Attachments
- Logging Out

## Introduction

The Mobile Field Service Store and Forward - Laptop application enables field service technicians to have access to information necessary for them to perform work at customer sites.

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

## User Interface

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

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

## Multiple Responsibilities

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

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

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

- Assign a different transition task status to different responsibilities.

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

- Customized menus

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

## Multiple User Laptop Groups

The Multiple User Laptop Group functionality will enable multiple mobile users of the Mobile Field Service Store and Forward - Laptop application to share a single laptop device. Using a single laptop device saves on hardware cost and enables flexible deployments (groups and single users can share the same laptop) when implementing the application.

You can enable this functionality by setting the profile option CSM: Data Routed to Group Owner to Yes and creating the multiple user laptop group.

For information on setting up multiple user laptop groups, see *Creating and Managing Mobile Users, Oracle Mobile Field Service Implementation Guide*.

## Open Service Request Against Any Product or Customer

This functionality will enable technicians to create service requests against any customer or asset/product they are responsible for using the Oracle Mobile Field Service Store and Forward - Laptop application. Previously, technicians were only able to create a service request against those customers and assets/products that had been downloaded to their mobile device.

To use this functionality, a system administrator will assign customers to the individual technicians or they will assign customers to the field service group owner if you are using a multiple user laptop group. In addition, if you are using multiple user laptop groups you have the option to associate other groups to your multiple user laptop group. Relating these groups together gives the administrator of the group the ability to assign and reassign work within the related groups.

For more information on assigning customers to technicians, see *Assigning Customers to Mobile Field Service Technicians, Oracle Mobile Field Service Implementation Guide*.

## File Based Synchronization

This functionality provides technicians and administrators with the ability to perform file based synchronization using the Oracle Mobile Field Service Store and Forward -

Laptop application. Technicians and administrators are able to save the data to be synchronized to an external device such as, a CD or flash drive. This functionality is very useful when the technicians are working in remote locations where network connections are not readily available.

For more information on file based synchronization, see [Launching and Synchronizing Oracle Mobile Field Service Store and Forward - Laptop](#), page 3-4 and [Setting Up File-Based Synchronization](#), page 4-25.

## **Launching and Synchronizing Oracle Mobile Field Service Store and Forward - Laptop**

To use the Mobile Field Service Store and Forward - Laptop application technicians and administrators will launch the application and then they will perform a synchronization with the enterprise system to ensure that they have the most current information and that their most current information from the laptop application is sent to the enterprise system. The synchronization process can be a system process or it can be a file-based process depending on how the application is configured.

For information on setting up file-based synchronization in the Mobile Field Service Store and Forward - Laptop application, see [Setting Up File-Based Synchronization](#), page 4-25

Complete the following steps to launch and synchronize Oracle Mobile Field Service Store and Forward - Laptop after the installation. Administrators and members of a multiple user laptop group can synchronize the data for the whole group. To install the application, see [Installing Oracle Mobile Field Service Store and Forward - Laptop](#), *Oracle Mobile Field Service Implementation Guide*.

### **Prerequisites**

- If you are performing file-based synchronization than the Mobile Field Service Store and Forward - Laptop application must be configured for this option.

### **Steps:**

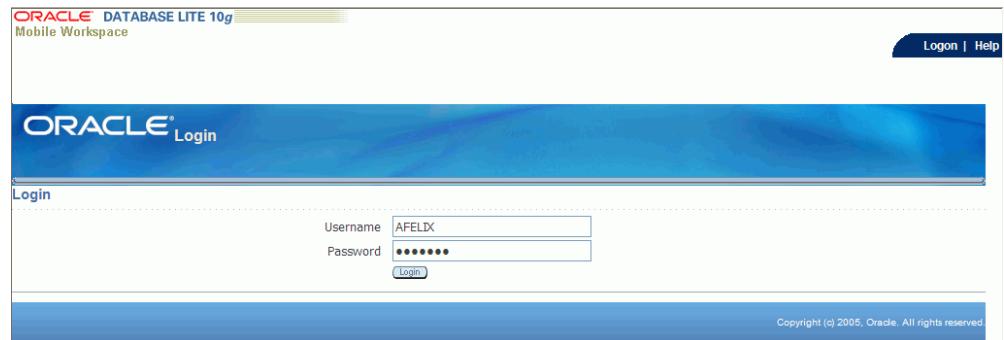
#### **Launch Web-to-Go and the Mobile Field Service Store and Forward - Laptop Application**

1. Select Start > Programs > Oracle Database Lite 10g > Oracle Web-to-go

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

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

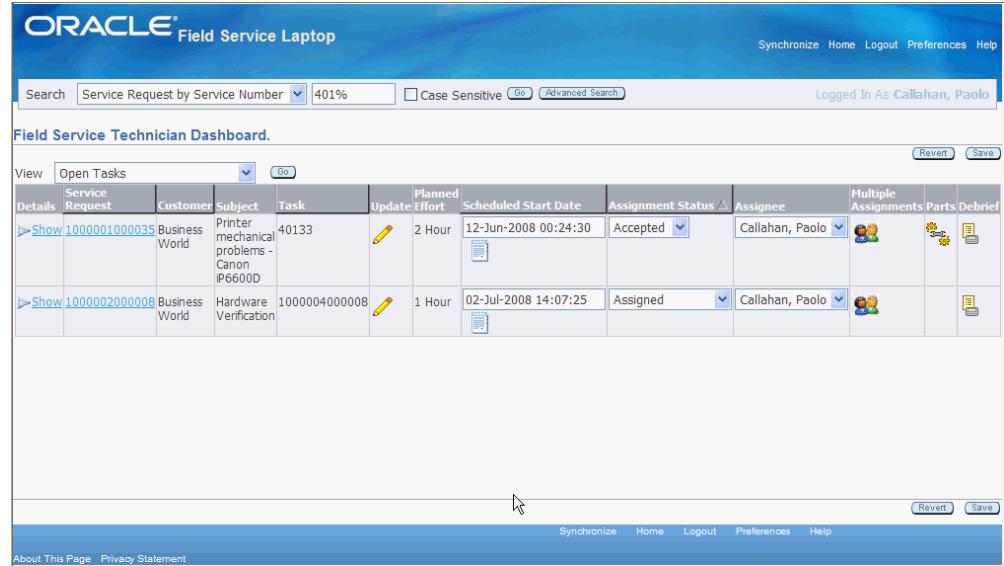
The Oracle Database Lite 10g login page appears.



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

The Field Service Technician Dashboard appears. For a description of this page, see Understanding the Field Service Technician Dashboard, page 3-10.

### **Field Service Technician Dashboard Page (1 of 2)**



## Field Service Technician Dashboard Page (2 of 2)

The screenshot displays the second page of the Field Service Technician Dashboard. At the top, a blue header bar contains links for Synchronize, Home, Logout, Preferences, and Help. Below the header, a message box indicates "Logged In As Callahan, Paolo". The main content area features a grid of assignments for "Callahan, Paolo". The grid has four columns: "Assignee", "Multiple Assignments", "Parts", and "Debrief". The "Assignee" column shows two entries, each with a dropdown menu. The "Multiple Assignments" column contains a person icon. The "Parts" column contains a gear icon. The "Debrief" column contains a clipboard icon. A cursor is hovering over the clipboard icon in the second row. To the right of the grid is a "Quick Links" sidebar with links for Create, Parts Order, Parts, Transfer, Calendar, Create Personal Tasks, Create Service, and Create Request. Below that is a "Messaging" sidebar with links for View, Messages, Create, and Message. At the bottom of the page are "Revert" and "Save" buttons, and a blue footer bar with links for Preferences and Help.

### Synchronize with the Enterprise System

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

4. Establish an internet connection for your laptop computer.
5. Click the Synchronize link located in the upper right corner of the page.

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



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

**(Alternative Method) Synchronize with the Enterprise System (File-Based)**

6. Click the File Sync link located in the upper right corner of the page.

**Note:** The Synchronization link changes to the File Sync link when the laptop application is configured for file-based synchronization.

**File based synchronization**

**Send File:**  *For example: c:\temp\sendfile*

**Receive File:**

[Sync](#) | [Reset](#) | [Cancel](#)

The File based synchronization page appears.

7. To upload information to the enterprise system, select the Send File option and enter the file name and location for where the system should create the file containing the data to be uploaded.
8. Click the Sync link.

The system creates the file in the location specified. You will receive a message stating that the synchronization succeeded and the file was created successfully.

9. Click the OK link.
10. To complete the upload process, navigate to the Mobile Server page.

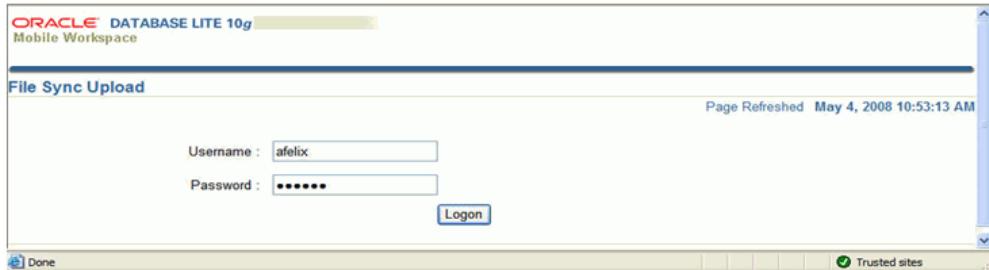
**ORACLE DATABASE LITE 10g**  
Mobile Workspace

**Logon | Setup | File Sync | Help**

**Workspace**



11. Select the File Sync tab.



The File Sync Upload page appears.

12. Login using your Username and Password.



13. Browse for the file name containing the data to be uploaded in the File Name field and click Upload.

The synchronization process is initiated. Upon completion, if there is data to be downloaded from the Enterprise system to the Laptop application a link will appear on the File Sync Upload page.

14. To download the information from the Enterprise system to the Laptop click the link on the File Sync Upload page.
15. Enter a file name and location for where the system should create the file containing the data to be downloaded.
16. Navigate to the Field Service Technician Dashboard.
17. Click the File Sync link located in the upper right hand portion of the page.
18. To download information from the Enterprise system, select the Receive file option and browse for the file name of the file containing the data to be downloaded.
19. Click the Sync link.

You will receive a message stating that the synchronization succeeded.

20. Click the OK link.

## Understanding the Field Service Technician Dashboard

The Oracle Mobile Field Service Store and Forward - Laptop Field Service Technician Dashboard serves as the point of entry for a field service technician.

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

The Dashboard is divided into these components:

- Main View
- Search Area
- Quick Links
- Messaging

### Main View

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

- Today's Tasks
- Unassigned Tasks
- Service Request without tasks
- Open Tasks

## Field Service Technician Dashboard Page (1 of 2)

ORACLE® Field Service Laptop

Synchronize Home Logout Preferences Help

Search Service Request by Service Number   Case Sensitive  Advanced Search

Logged In As Felix, Aaron

### Field Service Administrator Dashboard.

Employee Resource	Group	Task	Planned Effort	Scheduled Start Date	Assignment Status	Assignee	Multiple Assignments	Parts
Details	View	Open Tasks						
		Today's Tasks						
		Unassigned Tasks						
		Service Requests without tasks						
		Open Tasks						
► Show 26870	Business World	Robot Arm Microcontroller Programming Issue	40152	2 Hour	16-Jun-2008 13:26:45	Assigned	Felix, Aaron	
► Show 26870	Business World	Robot Arm Microcontroller Programming Issue	40153	2 Hour	17-Jun-2008 09:00:00	Assigned	Felix, Aaron	
► Show 26870	Business World	Space Station Microcontroller software Issue	40175	2 Hour	19-Jun-2008 09:12:30	Assigned	Felix, Aaron	
► Show 1000002000008	Business World	Hardware Verification	40236	1 Hour	02-Jul-2008 14:07:25	Assigned	Callahan, Paolo	
► Show 1000003000008	Business World	Check Hardware	1000005000008	1 Hour	03-Jul-2008 15:13:38	Accepted	Callahan, Paolo	
► Show 1000003000035	Business World	Sprinkler System - Check Control Valves and all associated pipes	40151	2 Hour	13-Jun-2008 10:23:13	Working	Felix, Aaron	

## Field Service Technician Dashboard Page (2 of 2)

Field Service Technician Dashboard Page (2 of 2)

chonize Home Logout Preferences Help

Logged In As Felix, Aaron

Revert Save

1-10 of 23

Assignee	Multiple Assignments	Parts	Debrief
Felix, Aaron			
Felix, Aaron			
Felix, Aaron			
Callahan, Paolo			
Callahan, Paolo			
Felix, Aaron			

Quick Links

- [Create Parts Order](#)
- [Parts Transfer](#)
- [Calendar](#)
- [Create Personal Tasks](#)
- [Create Service Request](#)

Messaging

- [View](#)
- [Messages](#)
- [Create](#)
- [Message](#)

Configuration

- [Configuration](#)
- [Initialize Member](#)

## Custom Views

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

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

To personalize a seeded or existing custom view, create a custom view, or designate a different view as the default view, see *Customizing Dashboard Views, Oracle Mobile*

*Field Service Implementation Guide.*

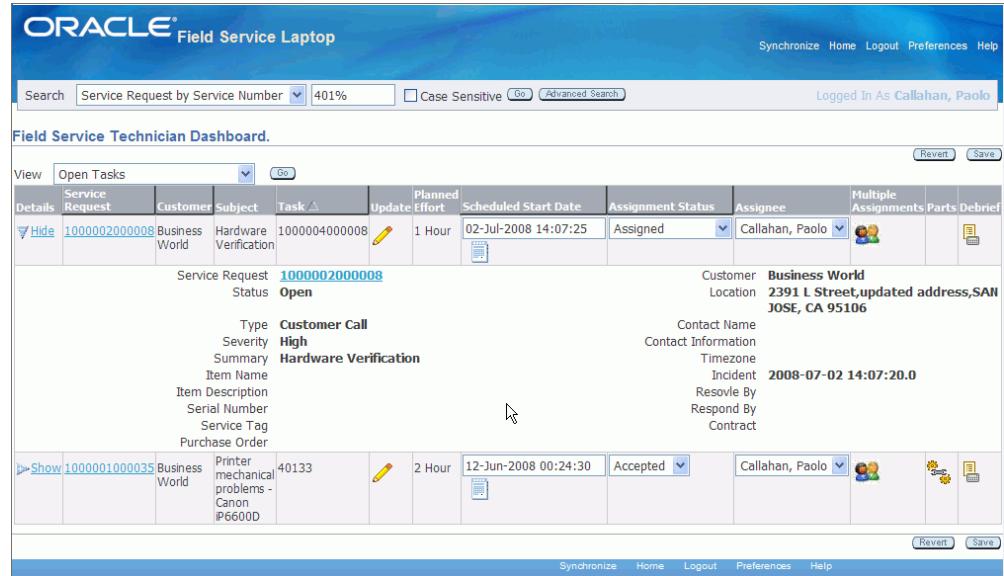
For more information about custom views, see Understanding Dashboard Customized Views, *Oracle Mobile Field Service Implementation Guide*.

## Dashboard Summary Table Functions

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

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

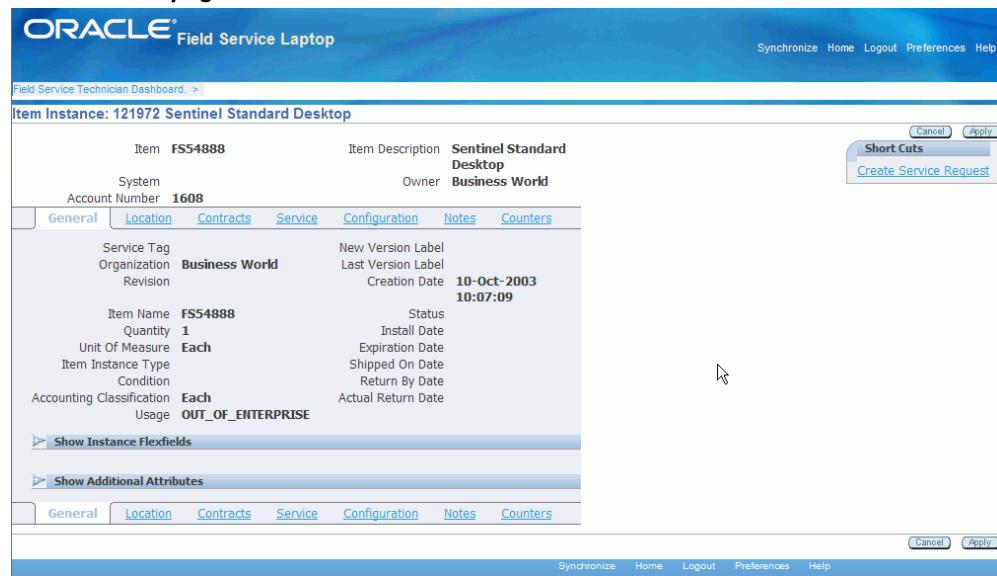
### **Field Service Technician Dashboard - Service Request Details**



The screenshot shows the 'Field Service Technician Dashboard - Service Request Details' page. At the top, there is a search bar with 'Service Request by Service Number' and a dropdown for '401%', and a link to 'Advanced Search'. The top right shows 'Logged In As Callahan, Paolo' with 'Synchronize', 'Home', 'Logout', 'Preferences', and 'Help' buttons. Below the header, the title 'Field Service Technician Dashboard' is displayed. The main content area shows a table with columns: Details, Service Request, Customer, Subject, Task, Update, Planned, Scheduled Start Date, Assignment Status, Assignee, Multiple Assignments, Parts, and Debrief. A row for Service Request 1000002000008 is shown, with a 'Show' link in the Details column. Below the table, detailed information for the service request is provided, including Type (Customer Call), Severity (High), Summary (Hardware Verification), and Item Name (Business World). To the right, customer details are listed: Name (Callahan, Paolo), Location (2391 L Street, updated address, SAN JOSE, CA 95106), and contact information (Contact Name, Contact Information, Timezone, Incident, Resolve By, Respond By, Contract). At the bottom, another table row for Service Request 1000001000035 is shown, with a 'Show' link in the Details column.

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

### Item Instance page



- Using Item Instance details:
  - Access Location details by clicking the Location link.
  - Access Contract details by clicking the Contracts link.
  - Access Service history details by clicking the Service link.
  - Access Configuration details by clicking the Configuration link.
  - Access Notes details by clicking the Notes link.
  - Access Counter details by clicking the Counters link.
- To access service request details, drill down to the Update Service Request page by clicking the Service Request number link.
- To view customer and product information, click the Service Request number link.
- To access task detailed information, click the Update icon in the row for the task.
- To change task assignment status, in the row for the task, select another status from the drop down menu in the Assignment Status column.
- To assign a task, technician will select them self as the resource using the Assignee field.

See Assigning Unassigned Tasks to Technicians, page 3-20.

- To assign a task, technician will click the Multiple Assignments icon and assign them self as the resource.

See Assigning Unassigned Tasks to Technicians, page 3-20.

- To access service part details, click the Parts icon in the row for the task.

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

See Viewing Parts Order Details, page 3-30.

### Update Task - Parts page

- To report labor, material, and expense, click the debrief icon in the row for the task.

See Performing Debrief, page 3-23.

## Search Area

The search area is used to retrieve a subset of tasks, based on search criteria that you specify. The technician can search based on the following search criteria using the basic search functionality:

- Service Request by Service Number
- Service Request by Service Tag
- Service Request by Customer Name

- Service Request by Item Name
- Service Request by Item Description
- Service Request by Serial Number
- Task by Task Number
- Task by Customer Name
- Customer by Customer Name
- Item Ordered by Item Name
- Item Ordered by Customer Name
- Inventory by Item Name
- Inventory by Subinventory
- Installed Base by Service Tag
- Installed Base by Item Name
- Installed Base by Serial Number
- Installed Base by Status

Using the advanced search functionality, the technician can search based on combinations of conditions and search parameters.

See [Using Search and Advanced Search](#), page 3-17.

## Quick Links

Quick links are provided for these operations:

- Create Parts Order.  
See [Ordering Parts for a Specific Task](#), page 3-26 and [Ordering Parts for Trunk Stock](#), page 3-29.
- Parts Transfer.  
See [Transferring Parts Between Sub-Inventories](#), page 3-31.
- Calendar.  
See [Viewing the Technician's Calendar](#), page 3-33.

- Create Personal Tasks.  
See Creating a Personal Task, page 3-35.
- Create Service Request.  
See Creating Service Requests., page 3-36

## **Messaging**

From the Messaging region you can select to:

- View Messages.
- Create Messages.

See Viewing and Sending Messages, page 3-41.

## **Using Simple Search and Advanced Search**

The Field Service Technician Dashboard provides technicians with the ability to perform a simple search or advanced search when searching for task-related information. With a simple search, technicians select a criterion in the Search field and then enter a full or partial value in the Search Criteria field and then click Go. This action will quickly retrieve the search criteria information. The Search field provides for the following types of searches:

- Service Request by Service Number
- Service Request by Service Tag
- Service Request by Customer Name
- Service Request by Item Name
- Service Request by Item Description
- Service Request by Serial Number
- Task by Task Number
- Task by Customer Name
- Customer by Customer Name
- Item Ordered by Item Name
- Item Ordered by Customer Name

- Inventory by Item Name
- Inventory by Subinventory
- Installed Base by Service Tag
- Installed Base by Item Name
- Installed Base by Serial Number
- Installed Base by Status

Advanced Search functionality is also available by clicking the Advanced Search button. When you click the Advanced Search button, the advanced search page appears where technicians can enter more detailed search criteria. The fields that appear in the advanced search page and the title of the advanced search page depend on the criterion that was selected in the Search field. For example, if you select Task by Task Number in the Search field and click the Advanced Search button, the Search Task page appears displaying advanced task-related search fields. If you select Service Request by Service Number in the Search field and click the Advanced Search button, the Service Request Search page appears displaying advanced service request-related fields.

Use this procedure to perform a simple or advanced search:

### **Steps:**

#### **Simple Search**

1. Navigate to the Field Service Technician Dashboard.
2. From the Search field drop down list select the type of information on which you want to search the task-related information, such as "Task by Task Number".
3. Enter the data value that you want the search to match such as, the task number in the field next to the Search field.
4. Click Go.

The Search Result table populates with results that match the search criteria.

The screenshot shows the Oracle Field Service Laptop application. At the top, there is a navigation bar with links for Synchronize, Home, Logout, Preferences, and Help. Below the navigation bar is a search bar with a dropdown menu set to 'Task by Task Number', a search term '401%', and a 'Case Sensitive' checkbox. A 'Go' button is also present. The main content area is titled 'Task Search' and contains a table titled 'Search Result'. The table has columns for Details, Task Number, Task Name, Task Priority, Task Status, Customer Name, and Service Number. The data in the table is as follows:

Details	Task Number	Task Name	Task Priority	Task Status	Customer Name	Service Number
<a href="#">Show 40133</a>		Printer mechanical problems -Canon iP6600D	High	Accepted	<a href="#">Business World</a>	<a href="#">1000001000035</a>
<a href="#">Show 40134</a>		Printer mechanical problems -Canon iP6600D	High	Accepted	<a href="#">Business World</a>	<a href="#">1000001000035</a>
<a href="#">Show 40135</a>		Robotic Arm Microcontroller Programming Issue	Low	Completed	<a href="#">Business World</a>	<a href="#">26870</a>
<a href="#">Show 40136</a>		Robotic Arm Microcontroller Hardware Issue	Low	Assigned	<a href="#">Business World</a>	<a href="#">26870</a>
<a href="#">Show 40151</a>		Sprinkler System - Check Control Valves and all associated pipes	High	Working	<a href="#">Business World</a>	<a href="#">1000003000035</a>
<a href="#">Show 40152</a>		Robotic Arm Microcontroller Programming Issue	High	Assigned	<a href="#">Business World</a>	<a href="#">26870</a>
<a href="#">Show 40153</a>		Robotic Arm Microcontroller Programming Issue	High	Assigned	<a href="#">Business World</a>	<a href="#">26870</a>
<a href="#">Show 40171</a>		Sprinkler System - Check Control Valves and all associated pipes	Low	Assigned	<a href="#">Business World</a>	<a href="#">1000003000035</a>
<a href="#">Show 40172</a>		Sprinkler System - Replacement Pipe And Fittings	High	Assigned	<a href="#">Business World</a>	<a href="#">1000003000035</a>
<a href="#">Show 40173</a>		Fix the Laptop	Low	Assigned	<a href="#">Business World</a>	
<a href="#">Show 40175</a>		Space Station Microcontroller software Issue	Low	Assigned	<a href="#">Business World</a>	<a href="#">26870</a>

At the bottom of the page, there are links for Synchronize, Home, Logout, Preferences, and Help. Below these links is a small note: 'About This Page Privacy Statement'.

## Advanced Search

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

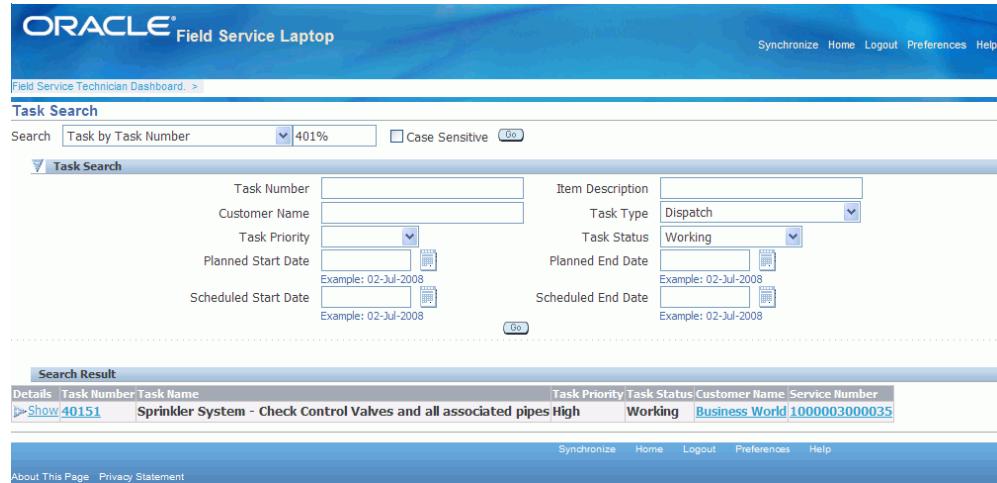
5. Click Advanced Search.

The advanced search page appears that is relevant to the search criteria. For example, if you select Task by Task Number the Task Search page appears. If you select Service Request by Service Number the Service Request Search page appears.

The search criteria fields that appear are different depending on the type of search you are performing. If you are searching for service requests than service request related field will appear for selection. If you are searching for install base information then the related fields appear.

6. Specify the additional search criteria and click Go.

The Search Results table populates with the data that matches the search criteria.



## Assigning Unassigned Tasks to Technicians

Using the Field Service Technician Dashboard technicians can assign themselves to tasks that are unassigned.

Use this procedure to assign technicians to unassigned tasks:

### Prerequisites

- A task must exist that has not been assigned to a technician.

#### To Assign a Technician to an Unassigned Task:

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Select Unassigned Tasks in the View field.  
All of the unassigned tasks appear in the summary table.
3. In the unassigned task row, select the Scheduled Start Date for the task.
4. Select an Assignment Status for the task.
5. Select the technician you want to assign the task to using the Assignee field.

**Note:** Technicians can only assign tasks to themselves.

6. Click Save.

The task is assigned to the technician.

#### **Alternative Method - To Assign a Technician to an Unassigned Task:**

1. Navigate to the Field Service Technician Dashboard.

The Dashboard appears.

2. Select Unassigned Tasks in the View field.

All of the unassigned tasks appear in the summary table.

3. In the unassigned task row, click the Multiple Assignments icon.

The Update Task - Details page appears.

4. In the Owner and Assignee(s) section, click the Add Assignee button.

The technicians Resource Name, Resource Type, and Status appear by default from the technician who is doing the assignment.

**Note:** Technicians can only assign tasks to themselves.

5. Click Apply.

The task is assigned to the technician.

## **Viewing and Opening Tasks**

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

- Using the Field Service Technician Dashboard. See Understanding the Field Service Technician Dashboard, page 3-10.
- Using the Technician's Calendar. For more information, see Viewing the Technicians Calendar, page 3-33.
- Using the search results of task-related information. See Using Simple Search and Advanced Search, page 3-17.

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

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

#### **Steps:**

1. Launch the Field Service Technician Dashboard.

The information for the default view appears.

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

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

- Service Request column - View the service request number.
- Customer column - View the Customer name.
- Subject column - View the description for the service request.
- Task column - View the task number of the desired task.
- Update column - Click the Update Task icon to access the Update Task - Details page.
- Planned Effort - View the planned duration for the task.
- Scheduled Start Date column - View when the task is scheduled to start.
- Assignment Status column - View and specify the current task status.
- Assignee column - View the resource assigned to the task.
- Multiple Assignments column - Click the Multiple Assignments icon to assign multiple resources to a task.
- Parts column - Click the Parts icon to view the parts order requirements.
- Debrief column - Click the Debrief icon to perform debrief on a task.

3. To view task-related details, click the Update Task icon for the respective task.
4. To view the service request, item instance, and customer details, click the Show/Hide link in the Details column.
5. To specify the current task assignment status, access the Assignment Status drop-down list for the desired task, and then make the appropriate selection. Click Save to save the status to the local database on your laptop computer.

For example, select a status from the following table:

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

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

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

## Performing Debrief

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

Debrief procedures for the Mobile Field Service Store and Forward - Laptop application are the same as the debrief procedures for the Pocket PC. See the Material Report sections under Performing Debrief Reporting.

## Setting Counters and Counter Properties

You can log a service request for a customer product that contains a counter. A counter helps a field service technician determine how much work was done before a customer product was serviced. For example, a copier having a number-of-copies counter.

There can be multiple customer product counters, each with multiple readings. From these multiple readings, you can learn the service history of the customer product.

You can also create new readings for a customer product counter. You can reset a reading as well as make miscellaneous readings. A miscellaneous reading can be a value used for testing a customer product. For example, a technician who is fixing a copier may make ten test copies after completing the service. The copy counter value increases by ten, but the technician does not want the customer to pay for the test copies. Therefore, the field service technician can state a miscellaneous reading of ten.

Finally, you can enter counter properties. Counter properties describe something about the customer product counter.

Use this procedure to enter a counter reading and to set the counter properties:

### Steps:

1. Determine the desired customer product for which you want to enter a counter reading and set the counter properties.
2. Select the task associated to the customer product and click the Update Task icon. The Update Task page appears.
3. Select the Debrief tab
4. Alternatively, from the Field Service Technician Dashboard, click the Debrief icon.
5. Expand the Counters section.
6. Enter the new reading value in the Value field.
7. Provide the new reading comments in the Comments field.
8. To save the new value, click Apply.
9. Complete the Date and Reading fields.

**Note:** The Date and Reading fields are mandatory. The date is the date that you take the reading, and the reading is the counter value that you want to record.

10. Complete or change any other fields as desired.
11. To make miscellaneous readings, select from the Misc. Reading Type drop-down list, and then complete the Misc. Reading field.
12. To reset the counter, complete the Reset Reading field.
13. Complete the property field for the customer product.
14. Click Apply.

## Creating and Viewing Notes

You can create and view notes for the following:

- Customer
- Customer Product
- Service Request
- Task

### Example

For example, you may make a note that a power supply needs to be replaced by a refurbished one.

A note includes the following:

- Note text
- Date entered
- Note type
- Visibility

Use this procedure to create and view a note:

### Steps:

1. Open the appropriate page:

- To create and view a service request note, from the Field Service Technician Dashboard, click the Service Request link against the service request.
- To create and view a task note, from the Field Service Technician Dashboard, click the Update Task icon against the task.
- To create and view a customer note, from Field Service Technician Dashboard, click the Update Task icon against the Customer.
- To create and view a customer product note, click the Show link against the service request for the customer product, and then click the Item Name link against the item. This action opens the Item Instance page. Select the Notes tab.

2. To view existing notes, expand the Notes History section.  
All the existing notes display.

3. Click the Show link to view note details.

4. To add a new note:

- Select the Note Source from the drop-down list in the Add Notes section.
- Select the note Type from the drop-down list.
- Select the Visibility from the drop-down list.
- Enter the text for the note in the Note text box.

5. Click Apply

## Ordering Parts for a Specific Task

Using the Mobile Field Service Store and Forward - Laptop, the Field Service technician has the ability to order parts for a specific task. The parts ordering functionality results in creating one of the following:

- Purchase Requisition
- Internal Order

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

Use this procedure to order a part specific to a task:

## Prerequisites

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

### Steps:

1. Navigate to the Field Service Technician Dashboard.

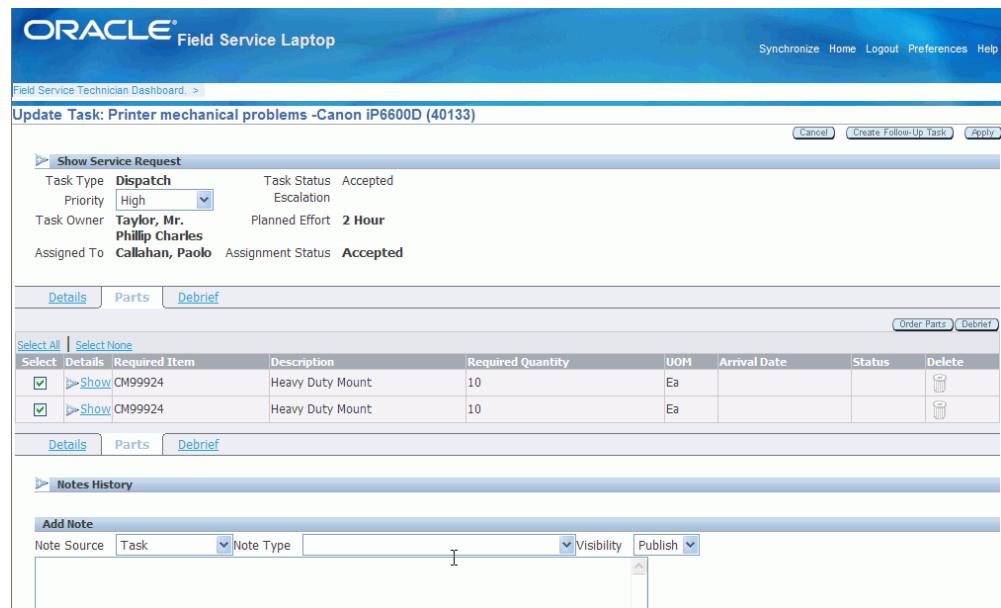
The Dashboard appears.

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

The Update Task page appears displaying the Details tab.

3. Select the Parts tab.

The Update Task - Parts page appears displaying the existing parts requirements if any exist.



Select	Details	Required Item	Description	Required Quantity	UOM	Arrival Date	Status	Delete
<input checked="" type="checkbox"/>	<a href="#">Show</a>	CM99924	Heavy Duty Mount	10	Ea			<a href="#">Delete</a>
<input checked="" type="checkbox"/>	<a href="#">Show</a>	CM99924	Heavy Duty Mount	10	Ea			<a href="#">Delete</a>

4. Click Order Parts.

The Create Parts Order page appears.

5. Provide the Need By Date.
6. Select a destination sub inventory. The technicians default Usable sub inventory appears by default.
7. Select an address. The technicians primary address appears by default.
8. Enter the Required Item for the parts order or search for it in the available lookup table.

After you select the item, the UOM appears for the item.

9. Provide item revision details if required.
10. Enter the Required Quantity.
11. (Optional) Enter the Ship Set value.

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

12. Click Apply.

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

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

4. Click the Delete icon in the Delete column.

**Important:** Parts requirements can be deleted only before synchronization. After synchronization with the Enterprise system, parts requirements cannot be deleted from Mobile Field Service Store and Forward - Laptop.

## 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

**Note:** The process for creating a parts order for the technician trunk stock is similar to the process for creating a parts order for a specific task. Both processes use the same Create Parts Order page.

Use this procedure to create a parts order for trunk stock sub-inventory:

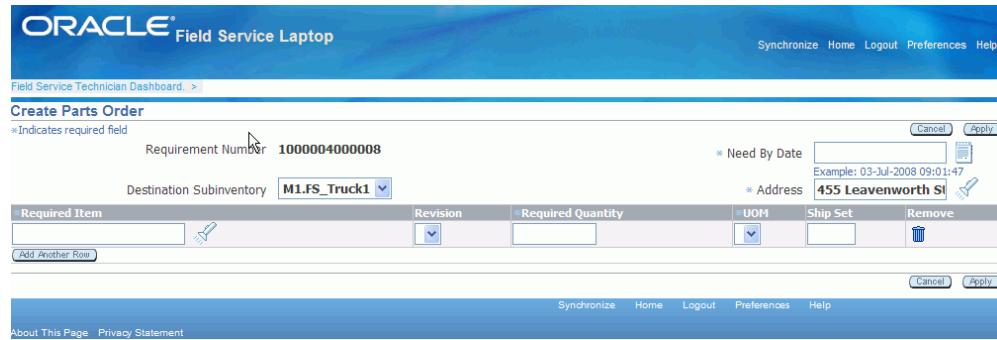
### Prerequisites

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

### Steps:

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. From the Quick Links section, click the Create Parts Order link.

The Create Parts Order page appears. A temporary parts Requirement Number is automatically created for the order. This parts Requirement Number is saved when you click Apply to complete the transaction.



3. Select a Need By Date for the parts order.
4. Confirm the Destination sub-inventory is correct. If it is not correct, select the correct sub-inventory from the list of values.
5. Verify the Address.
6. Enter the Required Item for the parts order or search for it in the available lookup table.  
After you select the item, the UOM for the item appears.
7. Provide item revision details if required.
8. Enter the Required Quantity.

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

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 Apply to complete the transaction.

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

## Viewing Parts Order Details

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

Use this procedure to view part order details:

## Prerequisites

- A part must be ordered.

### Steps:

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Navigate to the Update Task - Parts page.
  - Click the Parts icon in the Summary Table for the task for which parts were ordered.
  - Click the Update Task icon in the Summary Table for the task for which the parts were ordered > Select the Parts tab in the Update Task page.
3. Click the Show link to view the details of the parts order.  
The technician is able to view the parts order created only for a specific task.  
Additionally, you can view part order details using the *Item Ordered by Item Name* search criteria.

## Transferring Parts Between Sub-Inventories

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

### Steps:

#### To Transfer Parts

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Click the Parts Transfer link in the Quick Links section.  
The Transfer Parts window appears.
3. Click Add Another Row.

4. In the From Subinventory field, select the source sub-inventory from the drop-down list.
5. In the Item field, select the item you want to transfer.  
The Item UOM appears in the UOM field.
6. In the Quantity field, enter the quantity you want to transfer.
7. In the UOM field, provide the unit of measure for the quantity you want to transfer.
8. In the To Subinventory field, select the destination sub-inventory from the drop-down list.
9. In the Transfer Reason field, select a reason from the drop-down list.
10. Complete the control attributes for the item based on the item selected.

**Example**

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

11. In the Transfer Date field, provide the transfer date. The system date appears by default in the Transfer Date field. The technician can enter a future transfer date, but not a past date.
12. Click Apply.

**To Exit Without Transferring the Part**

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

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

#### **To View Parts Transfer Details**

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

The Transfer Parts page appears.

16. Enter search criteria details in the View Transfer Parts section and click Search.

The transfer part details display that match the search criteria.

17. To view details of the parts transfer, click the Show link.

#### **To Delete a Parts Transfer**

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

The Transfer Parts page appears.

19. Search for the specific part transfer in the View Transfer Parts section.

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

## **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 daily, weekly or monthly mode and can also drill down to task details from the calendar.

Use this procedure to view the calendar:

#### **Steps:**

##### **To Open the Calendar**

1. Navigate to the Field Service Technician Dashboard.

The Dashboard appears.

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

The technicians calendar appears in the daily view for the current date (by default).

##### **To Navigate the Calendar**

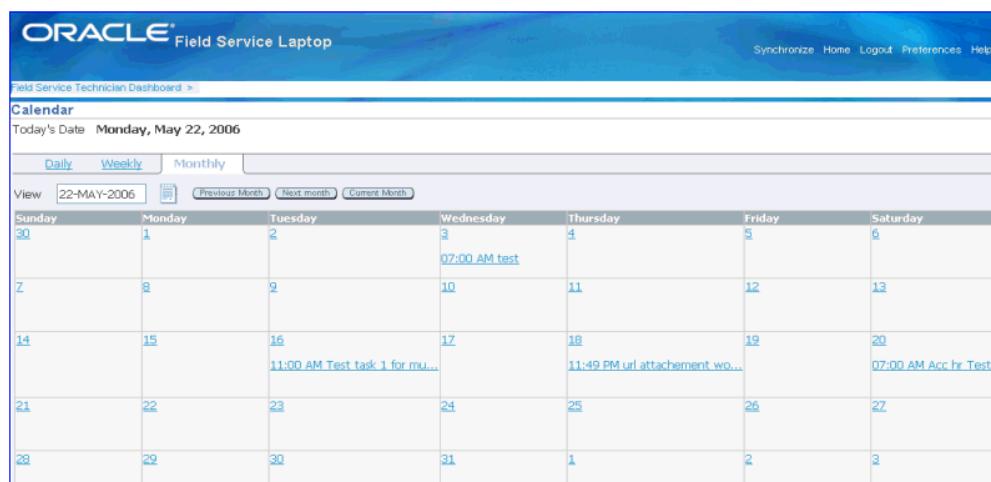
3. To view the previous or next day, click the Previous Day or Next Day buttons.

**Note:** The system date appears by default for the Calendar date. You can enter the date directly into the View date field. If you enter the date with the incorrect format, a warning message appears.

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

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

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, click the Previous Month or Next Month buttons.



7. To view the calendar for a specific day, select the Calendar from the Daily, Weekly, or Monthly tab.
8. Select a date using the View field.

Depending on which tab was open at the time the calendar was selected, the technicians calendar displays the day, week, or month for the date selected in the View field.

### To View Task Details

9. To view task details click the corresponding Task link that appears on the calendar.
  - If you are in the Daily View, the tasks for the selected date appear in the Calendar page.

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

The Update Task page appears displaying the task information.

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

#### **To Close the Calendar**

11. Click the Field Service Technician Dashboard link at the top left corner of the page.

## **Creating a Personal Task**

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

Use this procedure to create a personal task:

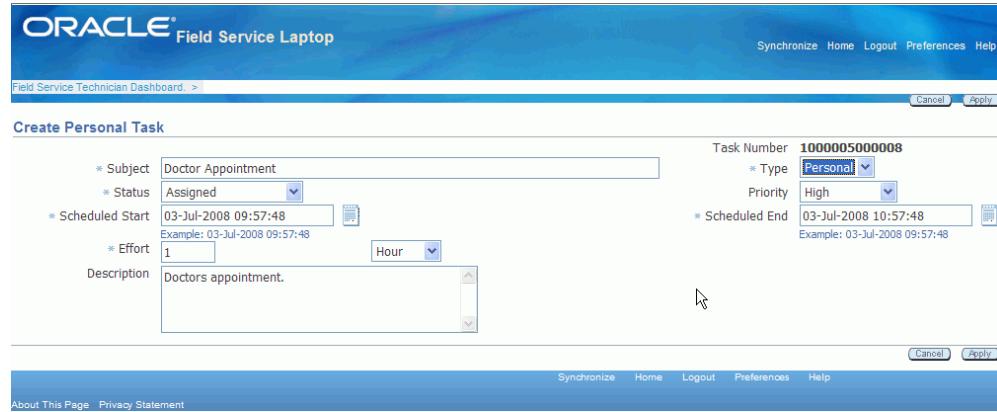
#### **Steps:**

1. Navigate to the Field Service Technician Dashboard.

The Dashboard appears.

2. Click the Personal Tasks link the Quick Links section.

The Create Personal Task page appears.



3. Enter the Subject field.
4. Select *Personal* in the Task Type field.
5. Select a Status for the personal task.
6. (Optional) Select a Priority for the personal task.
7. Enter the Scheduled Start and End Date for the personal task.
8. In the Effort field, enter the duration of the Personal Task.
 

**Note:** The Subject, Type, Status, Scheduled Start, Scheduled End, and Effort fields are mandatory.
9. Click Apply.

Oracle Mobile Field Service Store and Forward - Laptop creates a personal task and then returns you to the Field Service Technician Dashboard.

## Creating Service Requests

Field service technicians can create a new service request from the Field Service Technician Dashboard using the Create Service Request quick link. Technicians can create service requests against any customer or asset/product that they are responsible for. When setting up technicians you assign the customers they are responsible for using the Assign Customers page.

For more information on assigning customers to technicians, see Assigning Customers to Mobile Field Service Technicians, *Oracle Mobile Field Service Implementation Guide*.

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:

### To Create a Service Request:

1. From the Field Service Technician Dashboard, click the Create Service Request link in the Quick Links section.

The Create Service Request page appears.

#### Create Service Request Page (1 of 2)

This screenshot shows the 'Create Service Request' page (1 of 2). It includes fields for Customer Number (2813), Account Number (1608), Individual Owner (Callahan, Paolo), Customer (Business World), Group Owner (MFS Multi User Group), Contact Information (Contact Type: Customer, Contact Name: Brenda Johnson), Product Information (Item: AS54888, Item Instance: 100536, Service Tag: [empty], Item Description: Sentinel Standard Desktop, Serial Number: [empty], Incident Address: 8475 Elk Grove Road, New York, CA 10000 US).

#### Create Service Request Page (2 of 2)

This screenshot shows the 'Create Service Request' page (2 of 2). It includes a Problem Description section with a Summary field containing 'Check Hard Drive'. The Issues section contains fields for Request Type (Customer Call), Problem Type (Hardware Problem), Incident date, PO Number, Status (Open), Internal Severity (High), and Customer's Urgency (Respond - 24). The Resolution section includes fields for Resolution Type and Resolution Summary. The Add Note section allows notes to be added with fields for Note Source (Service Request), Type, Visibility, and Publish. Navigation links at the bottom include Synchronize, Home, Logout, Preferences, and Help.

### Enter Customer Information

2. Select either a Customer Number or the Customer name.

After you select a customer, the Account Number appears by default from the

selected customer. The Group Owner and Individual Owner appear by default from the technician that is creating the service request.

Group owner only applies if the technician is a member of a multiple user laptop group.

**Note:** If you set up the profile option CSM: Data Routed to Group Owner to Yes and completed all the setup required for a multiple user laptop group, then you will be able to view all those customers that are attached to the multiple user laptop group.

3. (Optional) Change the Group Owner if applicable.

**Note:** A member of a multiple user laptop group can create a service request for another group owner, if their group is related to another group.

4. (Optional) Change the Individual Owner if applicable.

**Note:** A member of a multiple user laptop group can create a service request for any other member in the group by selecting the member in the Individual Owner field.

### Enter Contact Information

The Contact Information region provides the following fields:

- Contact Type
- Contact Name
- Contact By

5. Select a contact type. Options are: Employee or Customer.

6. Select the Contact Name.

### Enter Product Information

7. To log Product Information, select values for the applicable fields in the following list:

- Item
- Item Description

- Item Instance
- Serial number
- Service Tag
- Incident Address

### **Enter the Problem Description**

8. In the Problem Description section, enter a Summary for the service request.

### **Enter Issues**

9. In the Issues section, select a Request Type from the list of values. For example, Field Service.
10. Select a Status, such as Open, or Working.
11. Select the Internal Severity level of the service request.
12. (Optional) Provide information such as Problem Type, Incident Date, Customer's Urgency, and PO Number.

### **Enter a Resolution**

13. Select a Resolution Type from the list of values.
14. Enter the resolution in the Resolution Summary field.

### **Add Note**

Using the Add Note section you have the option to enter notes.

15. Select a Note Source from the list of values. Sources are Customer or Service Request.
16. Select the Type of note from the list of values.
17. Select the note Visibility from the list of values. Options are: Publish, Public, or Private.
18. Enter note text in the Note text box.

### **Create Service Request**

19. To create the service request, click Apply.

The Service Request is created. The Create Service Request page title changes to the Update Service Request page. The Service Request number that was created

displays in the title of the page.

#### **(Optional) Create a Task**

Creating a task at this time is optional. You can always come back at a later date and add the task.

Using the *Service Requests with no tasks* seeded view on the Field Service Technician Dashboard page you can easily locate the service requests that do not have associated tasks.

20. Click the Create Task button.

The Create Task page appears.

21. Create the task.

For more information on creating a task, see Creating a Task Based on an Existing Service Request., page 3-48

## **Viewing Customer Information**

Before visiting a customer site, the technician may need address and customer information. Customer information is available from the Field Service Technician Dashboard.

**Note:** The technician has the ability to view customer information only when there is a task for the customer assigned to the technician.

Customer information such as, name, country, and location can be displayed as columns in the selected view. Additionally, to view customer information, technicians can click the Show link in the Details column.

## **Viewing Install Base Information**

Oracle Mobile Field Service Store and Forward - Laptop enables you to view the location and product details for a customer product. You are also able to view the configuration of the customer product and any additional attributes. Finally, you are able to view and add customer product notes.

Use this procedure to view Install Base information.

#### **Steps:**

1. Navigate to the Field Service Technician Dashboard.

The Dashboard appears.

2. Click the Show link in the Details column.
3. Click the Item Name link.

The Install Base Item Instance page appears displaying the General tab.

**Note:** The Item Name field will have the link only when an item instance is associated to the item, and the service request is created for that item and item instance combination.

4. To view the location details of the item instance, select the Location tab.
5. To view item configuration details, select the Configuration tab.

## Viewing and Sending Messages

Oracle Mobile Field Service Store and Forward - Laptop enables you to send and receive messages from other people within your organization. This messaging function facilitates communication among field service employees. It can be set up to send messages among all Field Service users, or among the members of one team.

You can use the New Message page to send messages. You can use this functionality to ask for support or additional information from other field service employees.

Technicians can send notification messages to the other resources from the Field Service Technician Dashboard by selecting the Create Message link from the Messaging section. The selection of the resource in the notification depends on the value of the profile option 'CSM: Notifications Scope'. The possible values for this profile are:

- All field Service Users: The technician can select any resource defined in the application.
- Representatives in the same Resource Group: The technician can select only resources that share the same resource group.

After you synchronize with the enterprise system, you can verify if you have received any messages.

Use this procedure to view messages that you have received and to delete messages that you have read:

### To View Received and Sent Messages:

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Click the View Messages link in the Messaging section.

The Notification Summary page appears.

3. From the View drop-down menu, select the category of messages that you want to retrieve. The options are:
  - All Notifications
  - Notifications For Me
  - Notifications From Me
4. To read a message, click the message subject link in the Subject column.

The Notification Details page appears displaying the complete message.

### To Write and Send New Messages:

When you need information from one of the other members of the field service organization, you can ask for it by sending a message.

Use this procedure to write and send messages to other people in the field service organization:

1. Navigate to the Field Service Technician Dashboard.

The Dashboard appears.
2. Click the Create Message link in the Messaging section.

The New Message page appears.

3. (Optional) Determine whether you want to send the message to everyone in the group. If you do, select Yes in the Send to Whole Group field.

**Note:** This field applies only if you are using multiple user laptop group functionality.

The To field becomes unavailable.

4. If you do not want to send the message to the whole group, select the recipient from the To field drop-down list.
5. Complete the Subject and Message.
6. Click Submit.

**Note:** Upon synchronization, the new message written by the technician is delivered to the recipient. Similarly, new messages for the technician become available for the technician to view from the view messages link.

## Viewing Contract Information

Before starting a task, a field service technician should review details about the customer and task. Such details include contract information. The field service technician uses this information to determine the following:

- Customer entitlements
- Contract coverage

Oracle Mobile Field Service Store and Forward - Laptop displays contractual information in a table format that you can reference for transaction billing types.

Use this procedure to view contractual information:

**To View Contractual Dates:**

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Select the service request for which you want to view contractual information and click the associated Service Request link in the summary table.

The Update Service Request page appears. The contract information appears in the Contractual Dates section of the page.

**To View Contract Details:**

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Click the Show link in the Details column associated with a service request and task.
3. Click the Item Name link.  
The Item Instance page appears for the item.
4. Select the Contracts tab.  
The Item Instance - Contracts page displays the Contract Line Details view.
  - The contract number appears in the Contract Number field.
  - The type of service covered by the contract appears in the Service Name field.
  - The Service description code appears in the Service Description field.
5. Click the Show link against the contract number to view the business process and entitlement database details for the contract number.

**Example**

For example, an Extended Notebook PC Service Program covers eight transaction billing types, each with a maximum amount of \$100,000. The percent covered by the service organization varies from transaction billing type. In one instance, a loaner notebook computer is provided under a Loafer transaction billing type with 10% coverage, so the service organization would only be responsible for 10% of the cost. In another instance, an Estimate Repair transaction billing type with 100% coverage could apply.

## Viewing Service History

To best serve the customer, field service technicians should review the customers service history prior to making a customer visit. Technicians can request service history for either a customer or a customer product. Only tasks and service requests that are closed or completed appear in the service history.

The amount of service history gathered for a customer is determined in customer setup. Here, the administrator determines how many service requests are used to create the service history. For example, the last three service requests may be compiled to create the service history.

Service history includes the following:

- Customer and contact details.
- Product details (item or install base).
- Service request and task assignment details.
- Reported labor, material, and expense for each customer visit.
- Field service technicians who previously visited the customer.

Use this procedure to view service history:

### Steps:

1. Navigate to the Field Service Technician Dashboard.

The Dashboard appears.
2. Click the Show link in the Details column against the service request for which you want to view service history.
3. Click the Item Name link.

The Item Instance page appears.
4. Select the Service tab.

The service history appears.

Additionally, you can use the *Service Request by Item Name* Search criteria to view the service history.

## Viewing and Changing Service Request Information

The service request contains practical information, including the problem and likely

resolution.

Use this procedure to view service request information:

**To View Service Request Information:**

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Identify the task information related to the service request.
3. Click the Show link in the Details column associated with a service request and task, and then click the Service Request number link.  
The Update Service Request page appears.

**To View Service Request Information (Alternative Method):**

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Click the Update Task icon in the task row.  
The Update Task page appears.
3. On the Update task page, expand the Show Service Request section.
4. Click the service request Number link.  
The Update Service Request page appears

**To View Service Request Information (Alternative Method):**

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Click the Service Request Number link.  
The Update Service Request page appears.

**To Change Service Request Information:**

1. Navigate to the Field Service Technician Dashboard.  
The Dashboard appears.
2. Identify the task information related to the service request.
3. Click the Update Task icon in the task row.

The Update task page appears.

4. On the Update task page, expand the Show Service Request section.

Under the Show Service Request section you can change or enter the following information:

- Item Name
- Item Description
- Item Instance
- Serial Number of the item
- Service Tag
- Problem and Problem Summary
- Resolution and Resolution Summary

## Understanding Task Creation

There may be times when you need to create a new or additional task for a service request. For example, if you cannot complete a task or need support from a fellow field service technician, then you should create an additional task.

There are two ways you can create a task:

- Based on an existing task that serves as a template.
- Based on an existing service request, where you have to complete all the desired fields.

## Creating a Task Based on an Existing Task

### Prerequisites

- A service request must exist.
- A task must exist.

### Steps:

1. From the Fields Service Technician Dashboard, click the Update Task icon against the task for which a new follow-up task needs to be created.

The Update Task page appears.

2. Click the Create Follow-Up Task button located in the top right corner.

The Create Follow-up Task page appears. The fields in this page populate based on the respective field values in the existing task.

3. Update the field values as required.
4. (Optional) Technicians have the ability to assign the follow-up task to themselves by selecting *Yes* in the 'Assign to me' field.
5. To create the follow-up task, click *Apply*.

After the creation and assignment of the follow-up task to the technician, the follow-up task appears in the Field Service Technician Dashboard.

## Creating a Task Based on an Existing Service Request

The existing service request could:

- Already be downloaded from the enterprise.
- Be newly created in the Mobile Field Service Laptop application.

### Prerequisites

A service request must exist.

### Steps:

#### To Create a Task for a Service Request Downloaded From the Enterprise

1. Launch the existing Service Request page from the Field Service Technician Dashboard or from the Update Task page. See Viewing and Changing Service Request Information, page 3-45.

2. Click *Create Task*.

The Create Task page appears. The fields in this page populate based on the data for the existing task for the same service request.

3. Update or modify the fields as required.
4. (Optional) Technicians have the ability to assign the follow-up task to themselves by selecting *Yes* in the 'Assign to me' field.
5. Click *Apply*.

The new task is created for the service request. After the creation and assignment of the follow-up task to the technician, the follow-up task appears in the Field Service Technician Dashboard.

### To Create a Task for a New Service Request

You can create tasks for a newly created service request.

6. Click Create Task.

The Create Task page appears.

The screenshot shows the 'Create Task' page in a Microsoft Internet Explorer browser. The page is titled 'Create Task' and includes fields for Subject, Priority, Status, Planned Start, Planned Effort, Scheduled Start, Task Number, Assign to me, and Type. The 'Subject' field contains 'Check the cable connection and check the battery connection'. The 'Priority' is set to 'Medium'. The 'Status' is 'Assigned'. The 'Planned Start' and 'Scheduled Start' are both set to '13-Sep-2006 12:18:05'. The 'Planned Effort' is '1 Hour'. The 'Task Number' is '1000002000100'. The 'Type' is 'Meeting'. The 'Planned End' and 'Scheduled End' are both set to '13-Sep-2006 13:18:05'. The 'Description' text box is empty. Below the main form, there is a 'Notes History' section with an 'Add Note' button and a table for note sources.

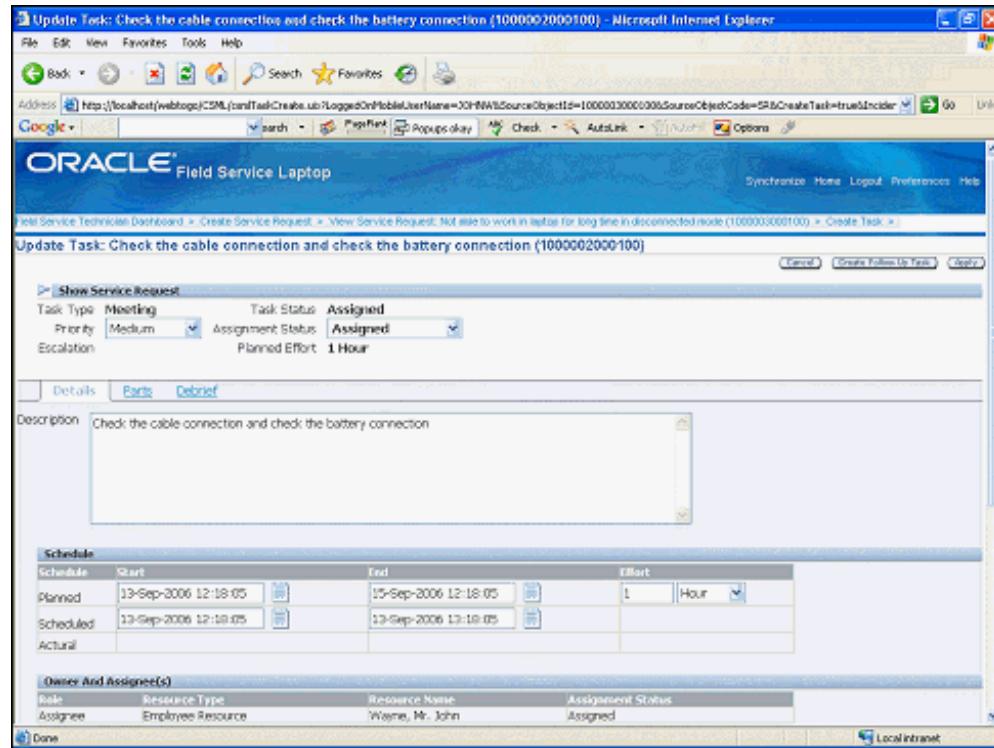
7. Complete the Description text box.

The system date and time appears by default in the Planned Start and Scheduled Start fields. The Planned End time is populated based on the value set for the profile option, 'CSFW: Planned Task Window'. The Scheduled End date and time are populated based on the effort value set for the task type.

8. Update or modify the fields as required.
9. (Optional) Technicians have the ability to assign the follow-up task to themselves by selecting Yes in the 'Assign to me' field.
10. To create the task click Apply.

The Update Task <Description> page appears.

After the creation and assignment of the task to the technician the follow-up task appears in the Field Service Technician Dashboard.



11. To upload an attachment, see Uploading Attachments, page 3-51.
12. To verify the service request and task, go to the Dashboard. The newly created Service Request and Task is available in the summary table of the Dashboard.

## Viewing a Service Request Attachment

From the update task page you can open and view any attachment associated with a service request. The attachment can vary in type such as, a .pdf, .doc, .xls, and .gif.

Use this procedure to view a service request attachment:

### Steps:

1. Navigate to the Update task page.
2. Expand the Show Service Request section.  
The existing service request attachments display in the Service Request Attachments section of the page.
3. Click the File Name link located under the Service Request Attachments.

The Attachment page appears.

## Uploading Attachments

Field Service technicians can upload service request attachments from their mobile devices. Technicians can add attachments to tasks and service requests. Uploaded data can be viewed in the enterprise system after synchronization.

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

### Supported Attachment Types

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

#### Steps:

Use this procedure to create and upload attachments.

1. Navigate Field Service Technician Dashboard > Update Task icon > Expand Show Service Request section.

The Update Task page appears.

Update Task: Check Power Supply and Disk (23176)

Show Service Request

Number 25354

Type Field Service

Customer Business World

Contact Name

Purchase Order Number

Item Name FS54888

Serial Number

Problem Summary

Problem Inspect and replace damage unit

FSCSM\_g 1 (150 c)

FSCSM\_g 3 (3 c)

FSCSM\_g 5 (3 c)

FSCSM\_g 7 (3 c)

FSCSM\_g 9 (l)

FSCSM\_g STD (d)

Enter the data like 19-May-2006

Context Value

Status Open

Severity Low

Incident Address 2391 L STREET,101,SAN JOSE, CA 95106

Communication

Contact Number 21279

Item Description Sentinel Standard Desktop

Service Tag

Resolution Summary

Resolution

FSCSM\_g 2 (3 d)

FSCSM\_g 4 (3 c)

FSCSM\_g 6 (3 c)

FSCSM\_g 8 (3 c)

FSCSM\_g 10 (l)

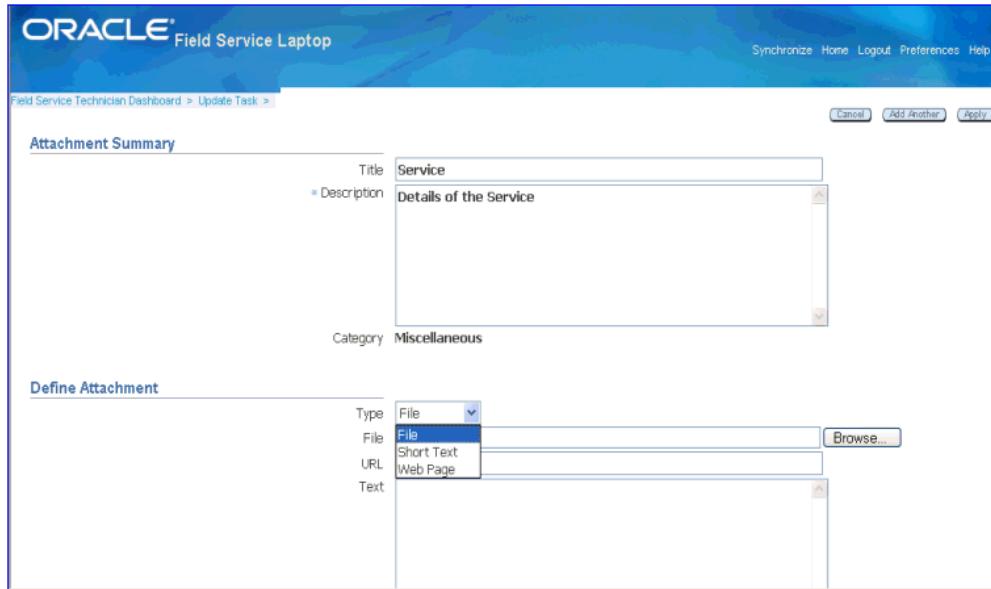
FSCSM\_g STD (dt)

Service Request Attachments

Delete	Title	Type	Description	Category	Last Updated By	Last Update	Usage
Add Attachment							
Delete Attachment							

2. Click Add Attachment.

The Attachment Summary page appears.



3. Complete the Title and Description fields.
4. If the attachment is a file, browse to and select the file.
5. If the attachment is a URL, enter the URL address. The limit is 4000 characters.
6. If the attachment is text, enter text up to 4000 characters.
7. Click Apply.
8. To save the attachment and proceed with another attachment, click Add Another.
9. To cancel the attachment, click Cancel.
10. To delete the attachments added, navigate:  
Field Service Technician Dashboard > Update Task icon > Expand Show Service Request section
11. Select the attachment that should be deleted by checking the check box in the select column, and then click the Delete Attachment button located in the header.

**Note:** Attachments can be deleted only before synchronization.

## Logging Out

When you have finished working in the Oracle Mobile Field Service Store and Forward

- Laptop application, you will want to log out of the application.

Use this procedure to log out of Oracle Mobile Field Service Store and Forward - Laptop:

## Prerequisites

- Save all data and be ready to exit the application.
- Perform a synchronization with the Enterprise system.

### Steps:

1. Click the Logout link in the upper right corner of any page.

Oracle Mobile Field Service Store and Forward - Laptop checks that all data has been correctly saved and then closes. The application returns to the login page.

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# Using Oracle Mobile Field Service Store and Forward - Laptop Administrators Dashboard

This chapter covers the following topics:

- Introduction
- Launching and Synchronizing Oracle Mobile Field Service Store and Forward - Laptop
- Understanding the Field Service Administrator Dashboard
- Activating and Disabling Members of a Multiple User Laptop Group
- Creating Service Requests
- Assigning Unassigned Tasks
- Assigning Multiple Resources to a Task
- Reassigning Tasks
- Viewing and Sending Messages
- Setting Up File-Based Synchronization

## Introduction

The Field Service Administrator Dashboard is the entry point for administrators or managers to perform multiple functions on behalf of their reporting field technicians.

The Field Service Administrator Dashboard is only available to administrators and owners of a multiple user laptop group. You need to define a multiple user laptop group with one member having the Field Service Group Owner responsibility and one or more members having the Field Service Group Administrator responsibility before you can access the Field Service Administrator Dashboard. Resources with the Field Service Group Member responsibility will use the Field Service Technician Dashboard to perform their daily job functions.

For information on creating a multiple user laptop group, see [Creating and Managing](#)

Mobile Users, *Oracle Mobile Field Service Implementation Guide*.

The Field Service Administrator Dashboard is similar to the Field Service Technician Dashboard. The functionality of the Dashboards is basically the same, except that the Field Service Administrator Dashboard is from the perspective of a team lead or manager whereas the Field Service Technician Dashboard is used by individual technicians.

The differences between the Field Service Administrator Dashboard and Field Service Technician Dashboard will be described in this chapter. For information on the Field Service Technician Dashboard, see Understanding the Field Service Technician Dashboard, page 3-10.

## **Launching and Synchronizing Oracle Mobile Field Service Store and Forward - Laptop**

To use the Mobile Field Service Store and Forward - Laptop application technicians and administrators will launch the application and then they will perform a synchronization with the enterprise system to ensure that they have the most current information and that their most current information from the laptop application is sent to the enterprise system. The synchronization process can be a system process or it can be a file-based process depending on how the application is configured.

For information on setting up file-based synchronization in the Mobile Field Service Store and Forward - Laptop application, see Setting Up File-Based Synchronization, page 4-25

Complete the following steps to launch and synchronize Oracle Mobile Field Service Store and Forward - Laptop after the installation. Administrators and members of a multiple user laptop group can synchronize the data for the whole group.

The Field Service Group Owner of a multiple user laptop group will install the application for the group on a single laptop device. To install the application, see Installing Oracle Mobile Field Service Store and Forward - Laptop, *Oracle Mobile Field Service Implementation Guide*.

### **Prerequisites**

- If you are performing file-based synchronization than the Mobile Field Service Store and Forward - Laptop application must be configured for this option.

### **Steps:**

#### **Launch Web-to-Go and the Mobile Field Service Store and Forward - Laptop Application**

1. Select Start > Programs > Oracle Database Lite 10g > Oracle Web-to-go

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

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

The Laptop client login page appears.

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

**Note:** This user must have either the Field Service Group Owner or Field Service Group Administrator responsibilities.

The Field Service Administrator Dashboard appears. For a description of this page, see Understanding the Field Service Administrator Dashboard, page 4-6.

### Synchronize with the Enterprise System

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

4. Establish an internet connection for your laptop computer.

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

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



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

### (Alternative Method) Synchronize with the Enterprise System (File-Based)

6. Click the File Sync link located in the upper right corner of the page.

**Note:** The Synchronization link changes to the File Sync link when the laptop application is configured for file-based synchronization.

File based synchronization

**Send File:**   
*For example: c:\temp\sendfile*

**Receive File:**

[Sync](#) | [Reset](#) | [Cancel](#)

The File based synchronization page appears.

7. To upload information to the enterprise system, select the Send File option and enter the file name and location for where the system should create the file containing the data to be uploaded.

8. Click the Sync link.

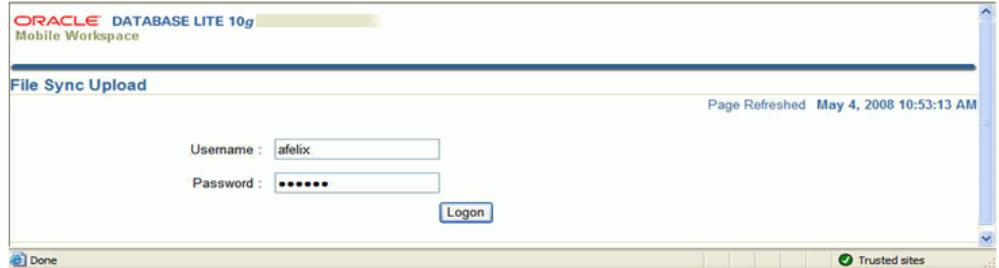
The system creates the file in the location specified. You will receive a message stating that the synchronization succeeded and the file was created successfully.

9. Click the OK link.

10. To complete the upload process, navigate to the Mobile Server page.



11. Select the File Sync tab.



The File Sync Upload page appears.

12. Login using your Username and Password.



13. Browse for the file name containing the data to be uploaded in the File Name field and click Upload.

The synchronization process is initiated. Upon completion, if there is data to be downloaded from the Enterprise system to the Laptop application a link will appear on the File Sync Upload page.

14. To download the information from the Enterprise system to the Laptop click the link on the File Sync Upload page.
15. Enter a file name and location for where the system should create the file containing the data to be downloaded.
16. Navigate to the Field Service Administrator Dashboard.
17. Click the File Sync link located in the upper right hand portion of the page.

18. To download information from the Enterprise system, select the Receive file option and browse for the file name of the file containing the data to be downloaded.

19. Click the Sync link.

You will receive a message stating that the synchronization succeeded.

20. Click the OK link.

## Understanding the Field Service Administrator Dashboard

The Oracle Mobile Field Service Store and Forward - Laptop Field Service Administrator Dashboard serves as the point of entry for a field service administrator, manager, or team lead.

**Important:** The Field Service Administrator *Dashboard* provides a similar look and feel, and functions in the same way as does the Field Service Technician Dashboard.

The Dashboard is divided into these components:

- Main View
- Search Area
- Quick Links
- Messaging
- Configuration

### Main View

The Dashboard appears displaying the designated default main view of tasks assigned to all the technicians that the administrator is responsible for. The view defines which columns of information appear in the summary table, the column sequence, and the criteria for tasks to appear in the rows of the table. Oracle provides these seeded views to use with the Dashboard:

- Today's Tasks
- Unassigned Tasks
- Service Request without tasks
- Open Tasks

In addition, in the Field Service Administrator Dashboard there is the Employee Resource field above the View field. This field enables administrators to view all the information for the group or for each individual member of the group. An administrator will select the type of view they want to use using the View field and then they will specify whether they want to see this view information for the entire group or for individual members of the group. The summary table appears displaying the information that matches these criteria.

### Field Service Administrator Dashboard

Employee Resource	Group	Task	Update Effort	Planned Start Date	Assignment Status	Assignee	Assigning Users	Parts Delivered
Show 74754	Felix, Aaron Ferrol, Adrian Davis, Adam Paolo, Callahan	44139 Replace Hard disk	2 Hour 2 Hour	05-May-2008 10:00:00 03-May-2008 12:09:20	Assigned Assigned	Felix, Aaron Davis, Adam Paolo, Callahan		
Show 1000003000109	World of Business Bank1	WATER PIPE LEAK DIAGNOSIS GUIDE	2 Hour	04-May-2008 11:48:52	Assigned	Paolo, Callahan		
Show 1000003000109	World Bank1	Water Pump Controls & Swift Switches	3 Hour	05-May-2008 11:54:41	Assigned	Felix, Aaron		

## Custom Views

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

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

To personalize a seeded or existing custom view, create a custom view, or designate a different view as the default view, see *Customizing Dashboard Views, Oracle Mobile Field Service Implementation Guide*.

For more information about custom views, see *Understanding Dashboard Customized Views, Oracle Mobile Field Service Implementation Guide*.

## Dashboard Summary Table Functions

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

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

## Field Service Administrator Dashboard - Service Request Details

The screenshot shows the Oracle Field Service Laptop application interface. At the top, there is a header bar with the Oracle logo and navigation links: Synchronize, Home, Logout, Preferences, and Help. Below the header is a search bar with the text "Service Request by Service Number" and the value "100001200000". There is also a "Case Sensitive" checkbox and a "Go" button. To the right of the search bar, it says "Logged In As Felix, Aaron".

The main content area is titled "Field Service Administrator Dashboard". It features a table with columns: Service Request, Customer, Subject, Task, Update Effort, Planned, Scheduled Start Date, Assignment Status, Assignee, Multiple Assignments, Parts, and Debrief. A row in the table is expanded to show details for Service Request 1000013000008, assigned to Business World with the subject "Run Diagnostics".

Below the table, there is a detailed view of the service request. It includes fields for Type (Customer Call), Severity (High), Summary (Desktop Won't Boot), Item Name (AS54888), Item Description (Sentinel Standard Desktop), Serial Number, Service Tag, and Purchase Order. To the right of these details, there is a section for Customer Information, including Location (2391 L Street, updated address, SAN JOSE, CA 95106), Contact Name, Contact Information, Timezone, Incident (2008-07-10 11:54:56.0), Resovle By, Respond By, and Contract.

At the bottom of the screen, there are "Revert" and "Save" buttons, and a footer bar with links: Synchronize, Home, Logout, Preferences, and Help.

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

### Item Instance page

The screenshot shows the Oracle Field Service Laptop Item Instance page. The top navigation bar includes links for Synchronize, Home, Logout, Preferences, and Help. The main content area displays item details for AS54888, including its description as a 'Sentinel Standard Desktop' and its owner as 'Business World'. The page is divided into several tabs: General, Location, Contracts, Service, Configuration, Notes, and Counters. The General tab is currently selected. Under the General tab, there are sections for Service Tag, Organization, Revision, Item Name, Quantity, Unit of Measure, Item Instance Type, Condition, Accounting Classification, and Usage. Below these sections are two buttons: 'Show Instance Flexfields' and 'Show Additional Attributes'. The Location tab is also visible, showing a list of locations with columns for Address, City, State, and Zip. The bottom of the page includes links for About This Page and Privacy Statement, and standard navigation links for Synchronize, Home, Logout, Preferences, and Help.

- Using Item Instance details:
  - Access Location details by clicking the Location link.
  - Access Contract details by clicking the Contracts link.
  - Access Service history details by clicking the Service link.
  - Access Configuration details by clicking the Configuration link.
  - Access Notes details by clicking the Notes link.
  - Access Counter details by clicking the Counters link.
- To access service request details, drill down to the Update Service Request page by clicking the Service Request number link.
- To view customer and product information, click the Service Request number link.
- To access task detailed information, click the Update icon in the row for the task.
- To change task assignment status, in the row for the task, select another status from the drop down menu in the Assignment Status column.
- To assign or reassign a task, select another resource using the Assignee field.

See Assigning Unassigned Tasks, page 4-18 and Reassigning Tasks, page 4-22.

- To assign or reassign multiple resources to a task, click the Multiple Assignments icon.

See [Assigning Multiple Resources to a Task, page 4-19](#).

- To access service part details, click the Parts icon in the row for the task.

See [Viewing Parts Order Details, page 3-30](#).

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

### **Update Task - Parts page**

Select Details	Required Item	Description	Required Quantity	UOM	Arrival Date	Status	Delete
<input checked="" type="checkbox"/>	FS54888	Sentinel Standard Desktop	1	Ea	09-Jul-2008 11:23:37	Sentinel Standard Desktop	
Requirement Number <b>1000004000008</b> Supplied Item <b>FS54888</b> Required Quantity <b>1</b> Destination SubInventory <b>FS_Truck1</b> Source SubInventory Document Number Ship Method Ship Date Way Bill Number				Need By Date <b>09-Jul-2008 11:23:37</b> Description <b>Sentinel Standard Desktop</b> Destination Organization <b>M1</b> Source Organization Source Type Ship To Address <b>455 Leavenworth Street</b> City <b>San Francisco</b> State and Zip Code <b>CA 94102</b>			

- To report labor, material, and expense, click the debrief icon in the row for the task.

See [Performing Debrief, page 3-23](#).

## Search Area

The search area is used to retrieve a subset of tasks, based on search criteria that you specify. The administrator can search based on the following search criteria using the basic search functionality:

- Service Request by Service Number
- Service Request by Service Tag

- Service Request by Customer Name
- Service Request by Item Name
- Service Request by Item Description
- Service Request by Serial Number
- Task by Task Number
- Task by Customer Name
- Customer by Customer Name
- Item Ordered by Item Name
- Item Ordered by Customer Name
- Inventory by Item Name
- Inventory by Subinventory
- Installed Base by Service Tag
- Installed Base by Item Name
- Installed Base by Serial Number
- Installed Base by Status

Using the advanced search functionality, the administrator can search based on combinations of conditions and search parameters.

See [Using Search and Advanced Search](#), page 3-17.

## Quick Links

Quick links are provided for these operations:

- Create Parts Order.

See [Ordering Parts for a Specific Task](#), page 3-26 and [Ordering Parts for Trunk Stock](#), page 3-29.

- Parts Transfer.

See [Transferring Parts Between Sub-Inventories](#), page 3-31.

- Calendar.

See Viewing the Technician's Calendar, page 3-33.

- Create Personal Tasks.

See Creating a Personal Task, page 3-35.

- Create Service Request.

See Creating Service Requests, page 4-14.

## **Messaging**

From the Messaging region you can select to:

- View Messages.
- Create Messages.

See Viewing and Sending Messages, page 4-23.

## **Configuration**

Using the configuration section of the page, the owner of a multiple user laptop group can initialize the members of the group to use the laptop device. Plus, they can also disable members of the group.

Plus, administrators can enable file based synchronization for the multiple user laptop group.

For information on activating and disabling members, see Activating and Disabling Members of a Multiple User Laptop Group, page 4-12.

For information on setting up file-based synchronization, see Setting Up File-Based Synchronization, page 4-25.

## **Activating and Disabling Members of a Multiple User Laptop Group**

Using the Members page within the Field Service Administrator Dashboard, the owner of the multiple user laptop group can activate the members of the group enabling them to use the single laptop device. They also can disable the members as well if the members no longer need access to the laptop device.

The Field Service group owner will activate the administrators and members (technicians) within the group to use the laptop device.

For information on creating a multiple user laptop group, see Creating and Managing Mobile Users., *Oracle Mobile Field Service Implementation Guide*

Use this procedure to activate a member or disable a member of the multiple user laptop group:

## Prerequisites

- A multiple user laptop group has been defined.
- Multiple users have been created with the required roles and assigned to the multiple user laptop group.

### To Activate Members of the Group:

1. Navigate to the Field Service Administrator Dashboard as the owner of the multiple user laptop group.
2. Click Initialize Member link in the Configuration section.  
The Members page appears displaying all of the members of the group.
3. Select the Initialize check box next to the administrator and member resources and enter their Password.

**Note:** This password is the same one they would use to access the Enterprise system.

4. Click the Save link.

A message appears stating that the selected operation was successful.

5. Click the OK link.

The Members page reappears.

The administrator and member (technician) resources has been activated to use the single laptop device. After the activation the administrators can now access the Field Service Administrator Dashboard and the members can access the Field Service Technician Dashboard in the Oracle Mobile Field Service Store and Forward - Laptop application.

6. Click the Field Service Administrator Dashboard link to go the Dashboard main page.

### To Disable Members of a Group:

1. Navigate to the Field Service Administrator Dashboard as the owner of the multiple user laptop group.
2. Click Initialize Member link in the Configuration section.

The Members page appears displaying all of the members of the group and the date and time they were initialized in the Initialize Time field.

3. Select the Disabled check box next to the member that you want to disable.
4. Click the Save link.
5. Click the OK link.

The member is now disabled. They will not be able to use the single laptop device to access the Mobile Field Service Store and Forward - Laptop application.

## Creating Service Requests

Field service administrators can create a new service request from the Field Service Administrator Dashboard using the Create Service Request quick link. Administrators can create service requests against any customer or asset/product for the technicians that they are responsible for. When setting up technicians you assign the customers they are responsible for using the Assign Customers page.

For more information on assigning customers to technicians, see *Assigning Customers to Mobile Field Service Technicians, Oracle Mobile Field Service Implementation Guide*.

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:

### To Create a Service Request:

1. From the Field Service Administrator Dashboard, click the Create Service Request link in the Quick Links section.

The Create Service Request page appears.

## Create Service Request Page (1 of 2)

ORACLE Field Service Laptop

Synchronize Home Logout Preferences Help

Field Service Technician Dashboard > Create Service Request

« Indicates required field

* Customer Number <input type="text" value="2813"/>	* Customer <input type="text" value="Business World"/>
Account Number <input type="text" value="1608"/>	Group Owner <input type="text" value="MFS Multi User Group"/>
Individual Owner <input type="text" value="Callahan,Paolo"/>	
<b>Contact Information</b> Contact Type <input type="text" value="Customer"/> Contact By <input type="text" value="brenda.johnson@businessworld.com"/>	
<b>Product Information</b> Item <input type="text" value="AS54888"/> Item Instance <input type="text" value="100536"/> Service Tag <input type="text"/> Item Description <input type="text" value="Sentinel Standard Desktop"/> Serial Number <input type="text"/> Incident Address <input type="text" value="8475 Elk Grove Road,New York,CA 10000 US"/>	

## Create Service Request Page (2 of 2)

Problem Description

\* Summary

Issues

* Request Type <input type="text" value="Customer Call"/>	* Status <input type="text" value="Open"/>
Problem Type <input type="text" value="Hardware Problem"/>	* Internal Severity <input type="text" value="High"/>
Incident date <input type="text"/>	Customer's Urgency <input type="text" value="Respond - 24"/>
PO Number <input type="text"/>	

Resolution

Resolution Type <input type="text"/>	Resolution Summary <input type="text"/>
--------------------------------------	---

Add Note

Note Source <input type="text" value="Service Request"/>	Type <input type="text"/>	Visibility <input type="text" value="Publish"/>
Note <input type="text"/>		

Synchronize Home Logout Preferences Help

### Enter Customer Information

2. Select either a Customer Number or the Customer name.

After you select a customer, the Account Number appears by default from the selected customer. The Group Owner and Individual Owner appear by default from the administrator that is creating the service request.

3. (Optional) Change the Group Owner if applicable.

**Note:** An administrator of a multiple user laptop group can create a service request and assign it to a different group if there are no skills, parts, or resource availability in the current group.

4. (Optional) Change the Individual Owner if applicable.

**Note:** An administrator of a multiple user laptop group can create a service request for any other member in the group by selecting the member in the Individual Owner field.

### **Enter Contact Information**

The Contact Information region provides the following fields:

- Contact Type
- Contact Name
- Contact By

5. Select a contact type. Options are: Employee or Customer.
6. Select the Contact Name.

### **Enter Product Information**

7. To log Product Information, select values for the applicable fields in the following list:
  - Item
  - Item Description
  - Item Instance
  - Serial number
  - Service Tag
  - Incident Address

### **Enter the Problem Description**

8. In the Problem Description section, enter a Summary for the service request.

### **Enter Issues**

9. In the Issues section, select a Request Type from the list of values. For example, Field Service.
10. Select a Status, such as Open, or Working.
11. Select the Internal Severity level of the service request.

12. (Optional) Provide information such as Problem Type, Incident Date, Customer's Urgency, and PO Number.

### **Enter a Resolution**

13. Select a Resolution Type from the list of values.
14. Enter the resolution in the Resolution Summary field.

### **Add Note**

Using the Add Note section you have the option to enter notes.

15. Select a Note Source from the list of values. Sources are Customer or Service Request.
16. Select the Type of note from the list of values.
17. Select the note Visibility from the list of values. Options are: Publish, Public, or Private.
18. Enter note text in the Note text box.

### **Create Service Request**

19. To create the service request, click Apply.

The Service Request is created. The Create Service Request page title changes to the Update Service Request page. The Service Request number that was created displays in the title of the page.

### **(Optional) Create a Task**

Creating a task at this time is optional. You can always come back at a later date and add the task.

Using the *Service Requests with no tasks seeded* view on the Field Service Technician Dashboard page you can easily locate the service requests that do not have associated tasks.

20. Click the Create Task button.

The Create Task page appears.

21. Create the task.

For more information on creating a task, see Creating a Task Based on an Existing Service Request., page 3-48

# Assigning Unassigned Tasks

Using the Field Service Administrator Dashboard administrators can assign tasks that have not been assigned. They can assign a task to any member within the multiple user laptop group.

Use this procedure to assign an unassigned task:

## Prerequisites

- A service request and task have been created but they have not been assigned to a technician.

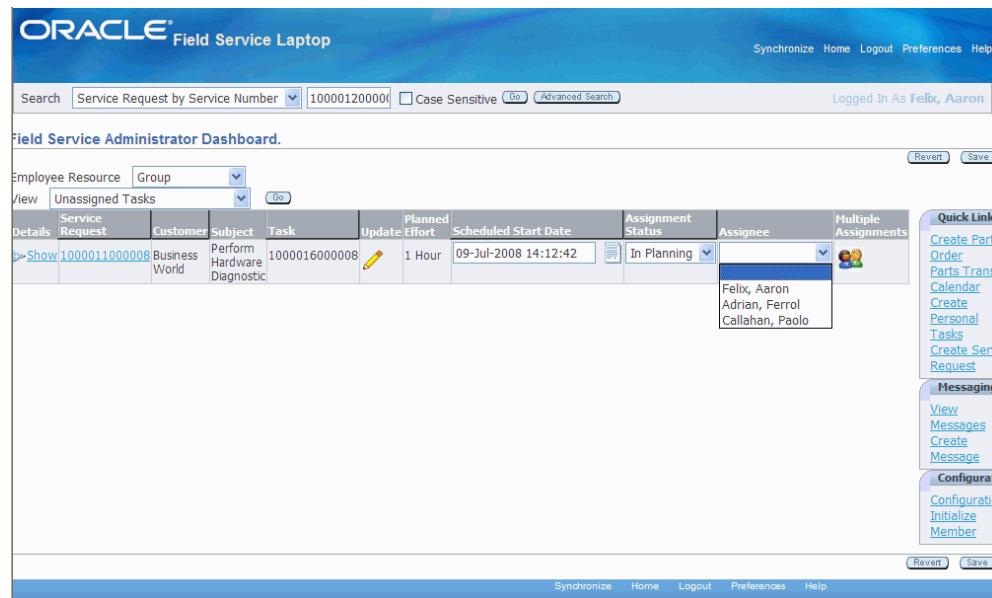
### To Assign Unassigned Tasks:

1. Navigate to the Field Service Administrator Dashboard.

The Dashboard appears.

2. Select *Unassigned Tasks* in the View field and click Go.

All of the unassigned tasks appear in the summary table.



The screenshot shows the Oracle Field Service Laptop interface. The title bar reads "ORACLE® Field Service Laptop". The main area is titled "Field Service Administrator Dashboard". A search bar at the top has "Service Request by Service Number" and "100001200001" entered. A dropdown menu for "View" is open, showing "Unassigned Tasks" as the selected option. Below this is a table with columns: Details, Service Request, Customer, Subject, Task, Update Effort, Planned, Scheduled Start Date, Assignment Status, Assignee, and Multiple Assignments. The first row shows a task with Service Request 1000011000008, Customer Business World, Subject Perform Hardware Diagnostic, Task 1000016000008, Update Effort 1 Hour, Planned 09-Jul-2008 14:12:42, and Assignment Status In Planning. The Assignee column has a dropdown menu open, showing "Felix, Aaron", "Adrian, Ferrol", and "Callahan, Paolo". The Multiple Assignments column has a small icon. On the right side, there is a "Quick Links" sidebar with links like Create Parts, Order, Parts Transfer, Calendar, Create Personal Tasks, Create Service Request, View, Messages, Create Message, Configuration, Initialize, and Member. At the bottom, there are "Revert" and "Save" buttons.

3. For the unassigned task that you want to assign, select the Assignee.
4. Click Save.

The task is assigned to the technician. The Assignment Status for the task changes from In Planning to Assigned.

Service Request	Customer	Subject	Task	Update	Planned Effort	Scheduled Start Date	Assignment Status	Assignee	Multiple Assignments	Parts	Debris
<a href="#">Show 1000002000008</a>	Business World	Hardware Verification	40236		1 Hour	02-Jul-2008 14:07:25	Assigned	Callahan, Paolo			
<a href="#">Show 1000003000008</a>	Business World	Check Hardware	1000005000008		1 Hour	03-Jul-2008 15:13:38	Accepted	Callahan, Paolo			
<a href="#">Show 1000009000008</a>	Business World	Verify hardware configuration	1000010000008		1 Hour	09-Jul-2008 13:27:24	Assigned	Callahan, Paolo			
<a href="#">Show 1000010000008</a>	Business World	Verify Hardware	1000013000008		1 Hour	09-Jul-2008 13:33:01	Accepted	Callahan, Paolo			
<a href="#">Show 1000010000008</a>	Business World	Hardware verification	1000015000008		1 Hour	09-Jul-2008 13:38:55	Accepted	Callahan, Paolo			
<a href="#">Show 1000011000008</a>	Business World	Perform Hardware Diagnostic	1000016000008		1 Hour	09-Jul-2008 14:12:42	Assigned	Callahan, Paolo			

## Assigning Multiple Resources to a Task

Using the Field Service Administrator Dashboard, administrators can assign multiple resources to a task.

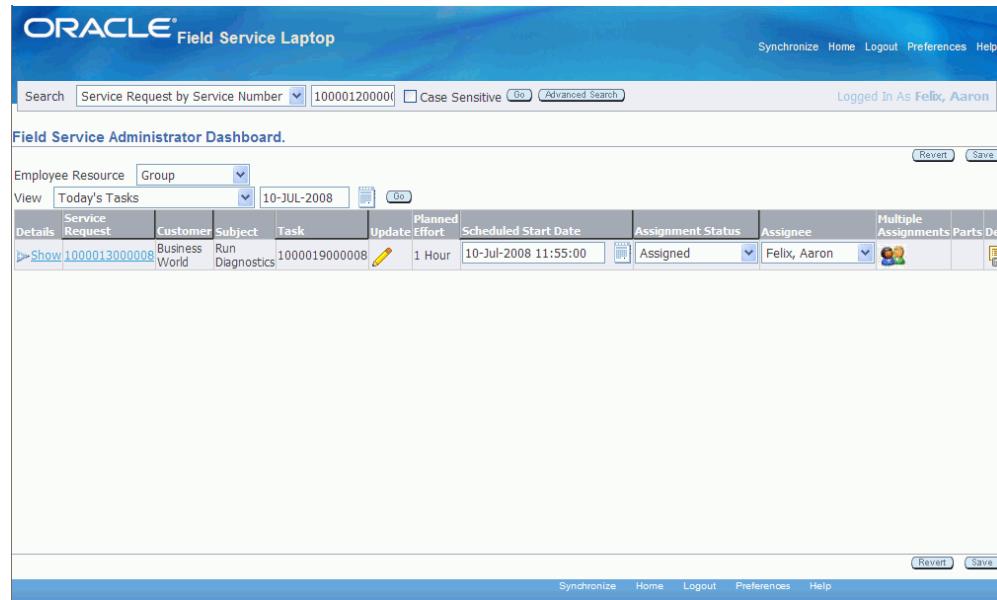
Use this procedure to assign multiple resources to a task:

### Prerequisites

- A service request and task have already been created.

### To Assign Multiple Resources to a Task:

1. Navigate to the Field Service Administrator Dashboard.



The Dashboard page appears.

2. Click the Multiple Assignments icon for a task.

#### *Update Task - Details page (1 of 2)*

Schedule	Start	End	Effort
Planned	10-Jul-2008 11:55:00	10-Jul-2008 12:55:00	1 Hour
Scheduled	10-Jul-2008 11:55:00	10-Jul-2008 12:55:00	
Actual			

## Update Task - Details page (2 of 2)

The screenshot shows the 'Update Task - Details page (2 of 2)'. At the top, there is a section titled 'Owner And Assignee(s)' with a table. The table has columns for 'Select Resource Name', 'Resource Type', and 'Status'. One row is visible, showing 'Felix, Aaron' as the resource name, 'RS\_EMPLOYEE' as the resource type, and 'Assigned' as the status. Below this table is a 'Notes History' section with a 'Add Note' form. The 'Add Note' form includes fields for 'Note Source' (set to 'Task'), 'Note Type', 'Visibility', and 'Publish'. At the bottom of the page are links for 'About This Page', 'Privacy Statement', and navigation buttons for 'Synchronize', 'Home', 'Logout', 'Preferences', and 'Help'. There are also 'Cancel', 'Create Follow-Up Task', and 'Apply' buttons.

The Update Task - Details page appears. Any resources that are currently assigned to the task appear in the Owner and Assignee(s) section of the page.

3. Click the Add Assignee button under the Owner and Assignee(s) section of the page.
4. Select a Resource Name and their Status for the task.

**Note:** An administrator can assign any members in their multiple user laptop group to a task.

5. Repeat steps 3 and 4 for each resource you want to add to the task.

The screenshot shows the 'Owner And Assignee(s)' section with a table. The table has columns for 'Select Resource Name', 'Resource Type', and 'Status'. Three rows are visible, each showing a resource name, resource type (RS\_EMPLOYEE), and status (Assigned). The resource names are 'Felix, Aaron', 'Adrian, Ferrol', and 'Callahan, Paolo'. Below the table is an 'Add Assignee' button.

6. Click Apply.

Service Request	Customer	Subject	Task	Update	Planned Effort	Scheduled Start Date	Assignment Status	Assignee	Multiple Assignments	Parts De
Show 100001300008	Business World	Run Diagnostics	100001900008	<input type="button" value="Edit"/>	1 Hour	10-Jul-2008 11:55:00	<input type="button" value="Edit"/>	Assigned	Callahan, Paolo	<input type="button" value="Edit"/>
Show 100001300008	Business World	Run Diagnostics	100001900008	<input type="button" value="Edit"/>	1 Hour	10-Jul-2008 11:55:00	<input type="button" value="Edit"/>	Assigned	Felix, Aaron	<input type="button" value="Edit"/>
Show 100001300008	Business World	Run Diagnostics	100001900008	<input type="button" value="Edit"/>	1 Hour	10-Jul-2008 11:55:00	<input type="button" value="Edit"/>	Assigned	Adrian, Ferrol	<input type="button" value="Edit"/>

The resources are assigned to the task. In the Field Service Administrator Dashboard summary table that task will be listed multiple times. One time for each resource assigned to the task. For example, if three resources have been assigned to Task A. Task A will appear in the summary table three times displaying each resource as the Assignee.

### To Delete an Assigned Resource:

1. Navigate to the Field Service Administrator Dashboard.

The Dashboard page appears.

2. Click the Multiple Assignments icon for a task.

The Update Task - Details page appears. Any resources that are currently assigned to the task appear in the Owner and Assignee(s) section of the page.

3. Select the resource you want to remove and click the Remove Assignees button.

4. Click Apply.

The resource is no longer assigned to the task.

## Reassigning Tasks

Using the Field Service Administrator Dashboard, administrators can reassign tasks to other resources.

Use this procedure to reassign a task to another resource:

### **To Reassign a Task:**

1. Navigate to the Field Service Administrator Dashboard.  
The Dashboard appears.
2. For the task you want to reassign, select another assignee using the Assignee field.
3. Click Save.  
The task is reassigned to the new resource.

### **(Alternative Method) To Reassign a Task:**

1. Navigate to the Field Service Administrator Dashboard.  
The Dashboard appears.
2. For the task you want to reassign, click the Multiple Assignments icon.  
In the Owner and Assignee(s) section of the page, the resource who is currently assigned to the task appears.
3. Select another resource using the Resource Name list of values.
4. Click Apply.  
The task is reassigned to the new resource.

## **Viewing and Sending Messages**

Oracle Mobile Field Service Store and Forward - Laptop enables you to send and receive messages from other people within your organization. This messaging function facilitates communication among field service employees. It can be set up to send messages among all Field Service users, or among the members of one group.

Administrators can use the New Message page to send messages. They can use this functionality to send vital information to the members of their group.

Administrators can send notification messages to the other resources from the Field Service Administrator Dashboard by selecting the Create Message link from the Messaging section. The selection of the resource in the notification depends on the value of the profile option 'CSM: Notifications Scope'. The possible values for this profile are:

- All field Service Users: The administrator can select any resource defined in the application.
- Representatives in the same Resource Group: The administrator can select only resources that share the same resource group.

After you synchronize with the enterprise system, you can verify if you have received any messages.

Use this procedure to view messages that you have received and to delete messages that you have read:

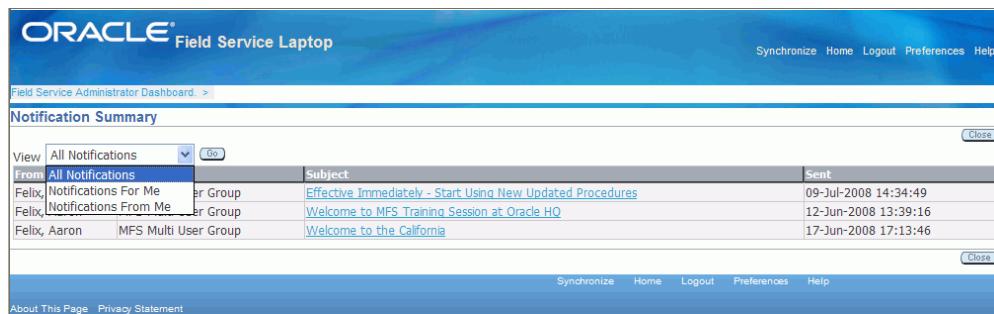
### To View Received and Sent Messages:

1. Navigate to the Field Service Administrator Dashboard.

The Dashboard appears.

2. Click the View Messages link in the Messaging section.

The Notification Summary page appears.



View	All Notifications	Subject	Sent
From	All Notifications		
Felix, Notifications For Me	Customer Group	<a href="#">Effective Immediately - Start Using New Updated Procedures</a>	09-Jul-2008 14:34:49
Felix, Notifications From Me	Customer Group	<a href="#">Welcome to MFS Training Session at Oracle HQ</a>	12-Jun-2008 13:39:16
Felix, Aaron	MFS Multi User Group	<a href="#">Welcome to the California</a>	17-Jun-2008 17:13:46

3. From the View drop-down menu, select the category of messages that you want to retrieve. The options are:

- All Notifications
- Notifications For Me
- Notifications From Me

4. To read a message, click the message subject link in the Subject column.

The Notification Details page appears displaying the complete message.

### To Write and Send New Messages:

When administrators need information from one of the other members of the field service organization or they would like to send information to the members of the group, they can do this by sending a message.

Use this procedure to write and send messages to other people in the field service organization:

1. Navigate to the Field Service Administrator Dashboard.

The Dashboard appears.

- Click the Create Message link in the Messaging section.

The New Message page appears.

- (Optional) Determine whether you want to send the message to everyone in the group. If you do, select Yes in the Send to Whole Group field.

The To field becomes unavailable.

- If you do not want to send the message to the whole group, select the recipient from the To field drop-down list.
- Complete the Subject and Message.
- Click Submit.

**Note:** Upon synchronization, the new message written by the administrator is delivered to the recipient. Similarly, new messages for the administrator become available for the administrator to view from the view messages link.

## Setting Up File-Based Synchronization

Using the Mobile Field Service Store and Forward - Laptop application technicians and administrators have the option to perform a file based synchronization. The owner of the multiple user laptop group configures this option and then the technicians and administrators can perform a file based synchronization.

File based synchronization enables technicians or administrators to plug in their own external device such as, a CD or flash drive and upload or download data when there is no network connectivity.

When performing the upload synchronization from the Mobile Field Service Store and Forward - Laptop application to the enterprise the administrator or technician can specify the file name and location where the file is to be stored using the File Sync

option in the application. After the synchronization file is uploaded to the portable media, the administrator is able to use the file to initiate the synchronization from the mobile server located at the office.

When performing the download synchronization from the enterprise to the Mobile Field Service Store and Forward - Laptop application the administrator or technician is able to download the file to the external media (CD or flash drive) from the mobile server located at the office. The administrator or technician is able to download the file using the File Sync option present in the laptop device located in the field.

For information on performing a file based synchronization, see [Launching and Synchronizing Oracle Mobile Field Service Store and Forward - Laptop, page 4-2](#).

### **To Set Up File Based Synchronization:**

1. Navigate to the Field Service Administrator Dashboard.

The Dashboard appears.

2. Click the Configuration link in the Configuration section of the page.

The Configure your Workspace page appears.

3. Select the Enable file based sync? check box.

4. Click the Save link and then OK.

The Synchronization link in the Dashboard changes to File Sync.

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# Using an E-Mail Interface for Mobile Queries

This chapter covers the following topics:

- E-Mail Mobile Queries

## E-Mail Mobile Queries

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

## Prerequisites

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

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

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

#### Example

Example: Mytasks david.baker@abc.com

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

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

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

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

#### ***Seeded Mobile Query Commands***

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

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

Seeded Command	Parameter	Details	Security	Output
		<p>Case5:</p> <p>Third party administrators can view the tasks that are assigned to administrators, members of third party groups and the tasks assigned to the group.</p> <p>A group administrator can execute the query with a technician's e-mail ID to view the list of tasks assigned to the technician.</p>		

Seeded Command	Parameter	Details	Security	Output
Partinfo	Part number	<p>Searches for parts based on the technician's location.</p> <p>Enables technicians /administrators to view if the part is returnable or consumable.</p> <p>Enables you to know if the part is Serialized, Lot controlled, Locator controlled, or IB Trackable.</p> <p>Enables technicians /administrators to view the Item Revision of the part.</p>	<p>Enables technicians /administrators to view if the part is returnable or consumable.</p> <p>Enables you to know if the part is Serialized, Lot controlled, Locator controlled, or IB Trackable.</p> <p>Enables technicians /administrators to view the Item Revision of the part.</p>	<p>The following fields are displayed in the e-mail</p> <ul style="list-style-type: none"> <li>· DATA FROM:</li> <li>· PART NUMBER</li> <li>· DESCRIPTION</li> <li>· STATUS</li> <li>· REPAIRABLE</li> <li>· RETURNABLE</li> <li>· CONSUMABLE</li> </ul>

Seeded Command	Parameter	Details	Security	Output
Partsub		<p>Searches for substitute parts if the primary part is not available to meet the SLA.</p> <p>Notes associated with substitutes and supersession that are of type text are only displayed. For other attachments only a message is displayed.</p>	<p>Enables you to view the valid substitute and supersession items in the inventory.</p>	<p>The following fields are displayed in the e-mail:</p> <ul style="list-style-type: none"> <li>SUPPLIED ITEM</li> <li>DESCRIPTION</li> <li>ITEM</li> <li>TYPE</li> <li>SUBSTITUTE ITEM</li> <li>DESCRIPTION</li> <li>SOURCE ORGANIZATION</li> <li>SOURCE SUBINVENTORY</li> </ul>

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

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

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

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

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

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

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

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

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

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

Seeded Command	Parameter	Details	Security	Output
		Third Party administrators can view task details, including the notes on the task, for tasks that are assigned to their technicians and the tasks assigned to the group.		The following fields are displayed in the email body:
				· TASK NUMBER
				· TASK NAME
				· DESCRIPTION
				· PRIORITY
				· TYPE
				· STATUS
				· CUSTOMER
				· SCHEDULED_START_DATE
				· SCHEDULED_END_DATE

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

Seeded Command	Parameter	Details	Security	Output
		Additionally, task notes are displayed.	service request and tasks details for service requests or tasks that are assigned to their technicians and the tasks assigned to the group.	The following fields are displayed in the email body:  · SERVICE REQUEST  · DESCRIPTION  · CUSTOMER NAME  · STATUS  · SEVERITY  · REPORTED_DATE  · INSTALL BASE  · INSTANCE  · SERIAL_NUMBER  · PROBLEM_CODE

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

---

Seeded Command	Parameter	Details	Security	Output
				END_DATE
				WARRANTY DETAILS

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# Part 3

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



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## Using Oracle Mobile Field Service - Wireless

This chapter covers the following topics:

- Introduction
- Getting Started
- Viewing, Managing, and Updating Your Tasks
- Viewing Today's Tasks
- Performing a Task Search
- Updating an Existing Task
- Recording Counter Readings
- Adding Debrief Lines to a Task
- Adding a Labor Line
- Creating a Service Request
- Creating a Service Request from the Main Menu
- Creating a Follow-Up Task
- Understanding Scheduling Tasks
- Starting Self-Assigned Tasks Immediately
- Self-Scheduling Tasks
- Using Window to Promise to Schedule Tasks
- Using the Intelligent Mode to Schedule Tasks
- Viewing Install Base Product Configuration
- Making Mobile Queries
- Performing a Parts Search
- Using Radius Search Capabilities
- Creating a Parts Requirement

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

## Introduction

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

Not only can technicians view their daily schedule of tasks, they can also perform many other functions, such as ordering parts, creating and scheduling follow-up tasks, creating service requests, and accessing the Knowledge Base for potential solutions to common customer issues. The Oracle Mobile Field Service - Wireless application also enables technicians to access their daily schedule of tasks even when not in the network service area.

Optionally, technicians can use Mobile Field Service - Wireless to get directions to a job site.

## User Interface

The Mobile Field Service - Wireless application provides a consistent user experience through a common look and feel (same color palette, same art direction), and through similar interaction behaviors.

### Support for Blackberry™ Devices

The Mobile Field Service - Wireless application user interfaces are certified for use in Blackberry™ devices. As the device does not support the horizontal bar, input pages are changed to linear format from the tabular format.

**Example**

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

Pages containing tables are provided with width for the columns.

**Example**

- Task Search result page
- Part Search result page

**Choose between Images and Buttons**

The Mobile Field Service - Wireless application provides you the ability to choose between images and buttons for the user interfaces. The value of the Profile Option CSFW: Use Icons for buttons determines whether icons or buttons appear:

- If the Value of this profile is: Yes, then icons appear.
- If the Value of this profile is: No, then buttons appear.

For more information about setting Profile Options, see the *Oracle Mobile Field Service Implementation Guide*.

## Dependencies

Mobile Field Service - Wireless has these dependencies:

- The steps and procedures documented in this chapter are based upon the use of a Medium Form Factor device, such as a PDA. For a comparative list of the functionality available for Medium Form Factor, and Small Form Factor (WAP) devices, see Oracle Mobile Field Service Applications Compared, page 1-3.
- To use the Order Part and Parts Search functionality, you must enable the Spares Management application of Oracle Field Service. For detailed information about the Spares Management functionality, see the *Oracle Spares Management User Guide*.
- To use the Knowledge Base integration, you must install the Knowledge Management application. For detailed information on Knowledge Base functionality, see the *Oracle Knowledge Management User Guide*.

## Multiple Responsibilities

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

- Assign a different transition task status to different responsibilities.

The Task Status and Transition Rule are assigned to a specific responsibility. The business requirement of applying different rules for different field service users, can

be accomplished by creating new responsibilities and new rules, and then attaching them to each other.

- Customized menus.

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

**Example**

For example, if *Get Direction* or *Knowledge Base* functionality should not be provided to specific users, then a custom Field Service Wireless responsibility can be created with these functions excluded. Then this custom responsibility can be attached to specific users.

## Getting Started

To use Mobile Field Service - Wireless, you must have a secure connection to the Oracle Application Server (AS) that your business uses to provide the connection between the application server network and your wireless device. After the technician has logged into the AS server, they must log into the application with the user name and password that was created for them during setup.

**Note:** It is possible to configure a single sign on (SSO) to use for the Oracle Mobile Field Service - Wireless application. In this case, authentication will be done only once. For information on creating a single sign on, see the *Oracle Mobile Field Service Implementation Guide*.

Once logged in, the technician will view the Home Page based on the CSFW: Home Page profile option, which includes a list of hypertext links that provide access to the available functionality. This list includes the following links:

- Today's Task
- Task Search
- Offline Schedule
- Create Service Request
- Knowledge Base
- Parts Search
- Receive Parts
- Parts Return

- Transaction History

- Mobile Queries

- Get Direction

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

- Preferences

- Change Password

- About

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

The Logout button at the bottom of the screen returns you to the Oracle Application Login page.

To navigate through the user interface (UI), the technician will use standard point-and-click functionality. The Mobile Field Service - Wireless application uses standard Oracle HTML functionality, whereby buttons and links are enabled, fields can be entered, and lookups can be used to select values for those fields that are list of value (LOV)-enabled.

When a technician logs into the Mobile Field Service - Wireless application, the home page main menu might also display the following notification message: "Your schedule has been updated. Please save offline schedule." This message occurs anytime there is a task assignment status change or time change to an assigned service request, or if a new task has been assigned to the technician. The message is a hypertext link and, by clicking it, the technician can view their updated daily schedule.

The next time the technician connects to the network through the wireless device, the notification will appear indicating a change. The technician can then view the change and save it as an updated offline schedule.

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

## Business Process

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

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

Mobile Field Service Wireless supports the following business process flow.

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

From this moment the field service technician can use the Oracle Mobile Field Service Wireless application to retrieve and update task and task-related information, to order parts, create new service requests, create follow-up tasks, and schedule them.

3. The field service technician logs into the Oracle Mobile Field Service Wireless application.
4. The field service technician retrieves their agenda for the current working day.  
If the current day is not applicable, the field service technician can choose another date. Navigation options are *Next* and *Previous* day. The technician can navigate days in both directions one at a time. After the field service technician selects one of these options, this date becomes the current day.
5. The field service technician can now do the following:
  - View customer information.  
Field service technicians can inquire on the customer information concerning the selected task. They can also select customer telephone numbers and use them to call the customer.
  - View and update task information.  
Field service technicians can inquire on the task information concerning the selected task. They can change the resolution and the status of the selected task.
  - Enter debrief information for the task.  
When a field service technician works on a task, they have the ability create a debrief for that task after they have completed part or all of the task duties. A technician can add labor, material, and expense lines to the task, as well as capture counter readings and travel information.
  - Capture a customer signature.  
Technicians can capture a customer signature during the Debrief process, provided that they are using one of the medium form devices that is supported by Oracle. After a signature is captured during debrief, it is sent to the Field Service Core Debrief application, where it can be viewed as an attachment.
  - View service request information.  
Field service technicians can inquire on the request information concerning the selected task.

- Submit the resolution of the task.

Field service technicians can change the resolution of the selected task and update the problem code. The resolution list is extracted from the back office application. The technicians will be asked to close the task. If they close the task, the status of the task will be set to Closed.

- Submit the change of task assignment status.

If the CSFW: Update Schedulable Task profile is set to Yes, field service technicians can change the assignment status of a selected task, including that of a schedulable task. If the profile is set to No, technicians can only view the task. The task list is extracted from the back office application. When the assignment status of the task is set to Closed, the screen returns to the agenda.

- Access the Knowledge Base.

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

- Order Parts.

The technician can order parts for a task.

- Perform an Advanced Parts Search.

The technician can search for parts from their own sub-inventories, from coworker's sub-inventories, or from a field warehouse.

- Create service request and task.

When the technician is at the customer site and if the customer reports a new problem, then the technician can create a service request on behalf of the customer.

The technician can also create a task and assign the task to themselves by selecting: Work On It or Self Schedule options.

Alternatively, the technician can also provide the window of time to the customer and enable them to pick a schedule time that is suitable for them. In this scenario, the task may or may not be assigned to the technician.

## Viewing, Managing, and Updating Your Tasks

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

When viewing Today's Task or any other list of tasks returned from a Task Search, the information that displays depends upon the settings entered in the CSFW: Task Display, CSFW: Task Display 2, and CSFW: Task Display 3 profile options.

#### **Example**

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

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

The following task-related procedures are available to a field service technician through the Mobile Field Service - Wireless application:

- Viewing Today's Tasks
- Performing a Task Search
- Updating an Existing Task
- Creating a Service Request
- Creating a Follow-Up Task
- Viewing Install Base Product Configuration

## **Viewing Today's Tasks**

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

### **Prerequisites**

A task must be assigned to the resource.

#### **Steps:**

1. Field Service Wireless responsibility. From the main menu, click the Today's Task hypertext link.

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

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

A screen appears displaying the task number and some of the task details such as, task assignment status, customer name, service request number, task name,

priority, scheduled start, access hours, planned effort, and notes.

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

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

Customer Address, Do not default, Task Address, and Technician Address.

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

- Technician Addresses: All active usable addresses setup in the Addresses tab of the Resource Addresses and Sub-inventories window.
- Task Address: The incident address displayed for the task from the Service Request.
- Customer Addresses: Displays all Ship To addresses associated with the customer.

3. If you want to change the task assignment status, in the Status field, select the status you want to assign to the task (Working, Canceled, and so on) from the drop-down list and click Done to save the new assignment status.

4. To see additional customer information, click the hypertext Customer Name. This action will display detailed customer information that was entered on the service request. If the customer contact has an email address, you can click the email address and create a message by entering a Subject and a Message. To send the message click Done.

5. To see additional information about the service request, click the hypertext service request number. This action displays service request information such as customer name, summary of the service request, any notes that are attached, and also enables you to access any Knowledge Base solutions that might be attached to the service request. For more information on using the Knowledge Base, see Section 3.5, "Accessing the Knowledge Base".

6. If you want to add a note to the service request, click the Add notes hypertext link. You can also view existing notes, if any, by clicking the relevant hypertext link.

7. If you want to view service request attachments, click the Attachment icon. The Attachment icon only appears if there are associated attachments. The Attachment List screen appears displaying the attachment file name, size, and

description. Attachments can be of any type such as, file type (.jpeg, .bmp, .doc, .pdf, .xls, .gif, and so on), web page, or short text. Click the attachment name to download and view the attachment.

8. If you want to add a note to the task, click the Add notes hypertext link. You can also view existing notes, if any, by clicking the relevant hypertext link.

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

## Performing a Task Search

Use this procedure to perform a task search.

### Prerequisites

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

#### To Perform a Simple Task Search:

1. From the main menu, click the Task Search hypertext link.  
The Task Search screen appears.
2. Select a Search For option.  
Options are:
  - Open Tasks: Lists all the open tasks assigned to the technician.
  - Assigned Tasks: Lists all the tasks assigned to the technician either open or closed.
  - Created Tasks: Lists all the tasks created by the technician.
3. Select your task search criteria. You can filter your search for a task by using any of the following criteria that appear on the page:
  - Task Number
  - Service Request
  - Status

- Date
- Customer Name

4. Click OK to perform the search.

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

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

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

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

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

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

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

The Task Search screen appears.

2. Select a Search For option.

Options are:

- Open Tasks
- Assigned Tasks
- Created Tasks

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

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

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

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

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

Advanced search criteria are:

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

6. Click OK to perform the search.

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

## Updating an Existing Task

You can update key aspects of an existing task that has been assigned to you through Oracle Mobile Field Service - Wireless. You can access existing tasks through the Today's Task entry point, or by using the Task Search functionality.

You can make several updates to an existing task. The updates you can make include: updating the task assignment status, adding notes to the task, adding an attachment, adding debrief lines, updating additional task information, updating the scheduled start date and time, and viewing the task details report.

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

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

## Prerequisites

- A task must be assigned to the resource.

### Steps:

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

Main Menu > Task Search > Task Details

Main Menu > Today's Task > Task Details

The available status values display such as, Completed, Accepted, Rejected, Working, Cancelled. The possible status values that appear are based on the Task Status Transition Rule definition for the current responsibility.

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

**Note:** If a task is assigned to a service request that has products associated with it that include counter readings, upon changing the task assignment status to "Completed" a notification is generated asking the user if they want to "Capture Readings for the Following Counters?" and lists the products as a hypertext link. To capture the counter readings, click the hypertext link and enter the counter reading details. For more information, see Recording Counter Readings, page 6-14

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

The Add Note screen appears.

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

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

5. Select a note Status from the drop-down list. Possible values include: Public, Private, and Publish.

6. Enter the text of the note in the Descriptions text box.

7. When you have finished with the note, tap OK.

After the note is added, the Task Details screen is opened again. In the Notes field, you can now look at the note you added by tapping the View hypertext link. Furthermore, all notes attached to a task can be viewed and multiple notes are designated by a numerical value next to the View link. For example, if there are two notes attached to a task, you will see "(2)View" in the Notes field.

8. To view an existing note, tap the View hypertext link.

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

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

The note details are displayed.

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

The The Service Request: x screen appears.

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

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

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

The Add Attachment: x screen reappears.

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

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

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

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

## Recording Counter Readings

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

Use this procedure to record counter readings.

**Steps:**

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

The Counter details screen appears displaying the product name and the Current Reading.

2. In the New Reading field, record the counter reading for the product.
3. Optionally, enter a Reset Reason.
4. Optionally, enter a Reset Reading.
5. Click Done when you have finished recording the counter readings.

## Adding Debrief Lines to a Task

### **Adding Debrief Lines to a Task for Material Returns**

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

1. In the Material section - Return, click Add 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 displays the Item field in the Material section, with the one selected on the Search and Select: Item page.

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

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

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

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

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

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

9. (Optional) Select a Reason for the material transaction from the list of values.

10. Select the Return Reason from the list of values.

11. Click Apply. The material line is saved.

### **Adding Debrief Lines to a Task for Material Install**

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

The following lists the required fields for each type of line:

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

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

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

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

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

The Mobile Field Service - Wireless application also supports loaner transactions, whereby the field technician is installing a part at the customer site, which will serve as a temporary replacement part while the original is fixed. In this case, you will need to set up Service Activity Codes for material items of type Loaner.

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

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

1. Navigate to the task details page of the task you want to update. You can locate the task either through the Task Search function, or by using Today's Task functionality.
2. Select one of the following options from the menu and click Go.
  - **Debrief** - The Debrief summary screen appears. The screen will display the Customer Name and Debrief Number.
  - **Debrief: Assigned Parts** - You can view this menu option only if there are parts requirement for the task. The Material Line screen appears displaying the material debrief details.
  - **Debrief: Barcode Scan** - This option enables technicians to scan serial numbers or item numbers. The Scan Barcode screen appears
3. Optionally, if the Service Request has been resolved, select a Resolution Code from the drop-down menu and click Save.

Resolution codes are set up in Oracle TeleService and are user definable to meet your business needs.
4. If you want to add a summary of your work, enter some free form text in the Resolution Summary text box.

This information is reflected back on the Service Request window in Oracle TeleService and displays in the Resolution Summary section.
5. If you want to update the problem code, select a Problem Code from the drop-down menu and click Save.

Problem codes are set up in Oracle TeleService and are user definable to meet your business needs.

6. If you want to update the problem summary, enter some free form text in the Problem Summary text box.

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

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

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

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

These fields will render dynamically, based upon the Debrief line selection that you make, in other words, Expense, Labor, or Material.

9. If you are entering Material line information:

**For Regular Installation:**

Enter the following information:

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

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

For Used parts, the business process and activity code fields are rendered. If you select Unused or DOA, fields used in return routing are displayed instead. These fields are the destination subinventory and organization, shipping address, and

shipment number, waybill number, and carrier. For more information refer to the section **For Assigned Parts**.

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

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

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

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

#### **For Assigned Parts:**

Enter the following information:

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

#### **For Barcode Scanned Parts:**

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

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

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

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

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

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

10. . For a recovered part, additional information displayed include recovered item number, recovered item serial number, recovered instance, and recovered part disposition if applicable. If the profile CSF: Validate Part Replacement in Debrief is

set to Yes, then the installed part is validated against the recovered part and if they are same, the CSF: Update Debrief Lines concurrent program posts material debrief information to Oracle Inventory

11. Click Save to save the changes to the debrief line.
12. Click Post to post the debrief line. Click Post All to post all debrief lines.

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

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

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

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

#### Example

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

## Capturing Customer Signature

The Mobile Field Service - Wireless application enables you to capture a customer signature during the Debrief process, provided that you are using one of the medium

form devices that are supported by Oracle. Once a signature is captured during debrief, it is sent to the Field Service Debrief application, where it can be viewed as an attachment. A service manager can tell a signature has been captured because the attachment icon in core Debrief is enabled for that task.

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

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

## Adding a Labor Line

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

1. Navigate to the Task List screen and tap the desired task.
2. Select Debrief from the list of actions.

The Debrief screen opens.

3. In the Edit Line Types region, tap Add beside the Labor field.

The Labor Details screen displays the default business process, activity code, and the start and end dates, which can be changed.

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

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

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

Details page.

4. From the Item LOV, select the labor item.
5. Specify the start and end time for the labor activity. The hour values are depicted in the 24-hour clock format.
6. In the Duration field, enter the amount of labor time that was needed to complete the task.
7. Select the unit of time that describes the labor duration from the UOM list.
8. (Optional) Select the reason that best describes the state of the labor report item from the Reason list.
9. Tap OK.

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

## Creating a Service Request

One of the advantages that the Oracle Mobile Field Service - Wireless application offers a field service operation is the ability to create follow-up work orders in those situations when a technician recognizes the need while out in the field. For example, a field service technician can initiate a new service request from a wireless device while on a customer call at a customer site.

This option is available from either:

- The Create Service Request option in the drop-down menu of the Task Details screen, as documented in the following procedure, or
- The main menu. See Creating a Service Request from the Main Menu, page 6-25.

When creating a service request for the same customer while servicing a particular task, the Mobile Field Service - Wireless application defaults key information such as, customer name, address and contact name, if any. The customer name and address cannot be edited.

The service request type, status, and severity appear by default from profile options set up in Oracle TeleService. These values can be overridden, if necessary.

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

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

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

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

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

**Steps:**

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

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

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

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

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

8. To add Notes, click the Add hypertext link at the Notes field.
9. In the Notes screen, select the Type of note, the Status of the note, and enter a text Description for the note. When you are done, click OK to add the note and return to the request number screen.

10. To create a task for the service request, click the Add link at the New Task field.

The Create Task screen appears which is exactly the same as the screen used to create a follow-up task. See [Creating a Follow-Up Task, page 6-25](#) for details.

11. Click OK.

You can add a parts requirement to the task, which is associated with the new service request, just as you can when creating a follow-up task. You can also create a service request from the Mobile Field Service - Wireless application main menu. In this case, you must provide all the relevant customer information.

## Creating a Service Request from the Main Menu

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

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

## Creating a Follow-Up Task

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

In these cases, a technician can create a follow-up task through the Mobile Field Service - Wireless application. When a technician creates a follow-up task:

- the dispatcher manually assigns the task, or
- the technician self-assigns the task, or
- the technician can work on it right away, or
- the technician can provide time window options to the customer to schedule the task according to their preference, or
- the task is assigned automatically through Oracle Advanced Scheduler.

The task is automatically associated with the customer that the original task was assigned to. The Service Request number is defaulted from the original service request

as well. If there is a Parts Requirement associated with the original task, and you want to create an identical parts requirement, you can copy the parts requirement from the original task when you create the follow-up task.

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

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

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

## Prerequisites

- A task must be assigned to the resource.

### Steps:

1. Navigate to the task details page of the task you are working on. You can locate the task either through the Task Search function, or by using Today's Task functionality.  
Main Menu > Task Search > Task Details  
Main Menu > Today's Task > Task Details
2. From the drop-down list at the bottom of the details page, select Follow Up Task, and then click Go.  
The Follow Up Task screen appears with the Customer name and Request Number appearing from the original task. The Status of the task appears by default as well.
3. In the Priority field, enter the task priority.
4. Select a Planned Start Date for the task. You can perform this step by clicking Pick.
5. Enter a Planned Start Time.
6. Select a Planned End Date.
7. Enter a Planned End Time.
8. Enter the Planned Effort for the task.
9. If you want to copy the parts requirement from the original task, select the Yes radio button at the Copy Requirements field.

10. If you have any notes to add, enter them in the Notes field.

11. Click OK to create the task.

You can also add a parts requirement after the follow-up task has been created.

Click Add Requirement to navigate to the Add New Requirement Line screen and enter the appropriate information.

## Understanding Scheduling Tasks

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

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

Task scheduling and assignment from mobile devices supports the following business cases:

- Work On It: Self-assign and begin work right away.

When technicians have the necessary skills, parts, and calendar availability to work on the task right away, they can select the Work On It option. Since scheduling is not needed, Advanced Scheduler is not required to be implemented for this option.

See Starting Self-Assigned Tasks Immediately, page 6-28.

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

Technicians can select the Self Schedule option if the technician cannot begin work on the created task or follow-up task right away, and wants to come back later to complete the task. When this option is selected, the technician is presented with a list of available schedule options. The technician can choose a schedule option to self-assign the task. This option requires Advanced Scheduler to be implemented.

See Self-Scheduling Tasks, page 6-30.

- Window-to-Promise: This option provides a list of available time slots, or "windows" for customer selection. This option requires Advanced Scheduler to be implemented.

**Note:** The Window to Promise option does not guarantee that the

same technician will return to do the work.

See Using Window to Promise to Schedule Tasks, page 6-31.

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

See Using the Intelligent Mode to Schedule Tasks, page 6-33.

## Starting Self-Assigned Tasks Immediately

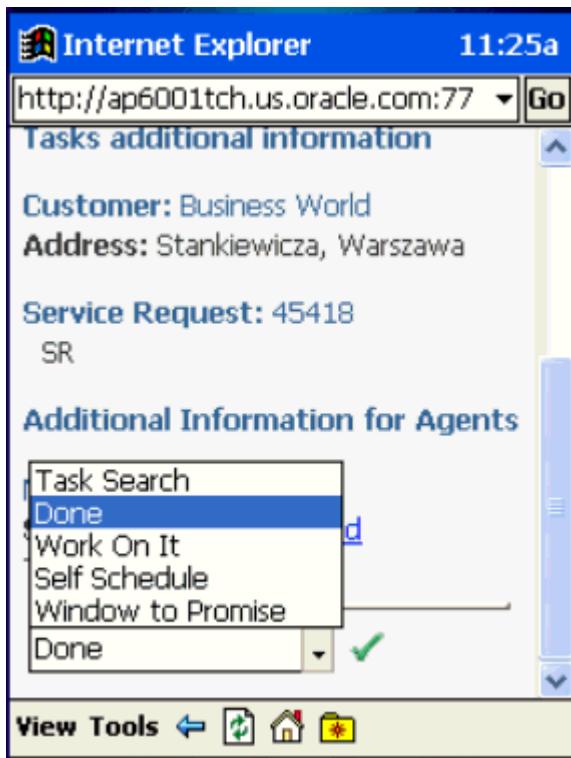
Use this procedure to start work on a self-assigned task right away:

### Prerequisites

- A service request must exist. See Creating a Service Request, page 6-23 or Creating a Service Request from the Main Menu, page 6-25.
- A task or follow-up task must exist. See Creating a Follow-Up Task, page 6-25.

### Steps:

1. Select a task from the Today's Tasks list.  
See Viewing Today's Tasks, page 6-8.
2. Select the Work On It option from the drop down menu, and then tap OK.

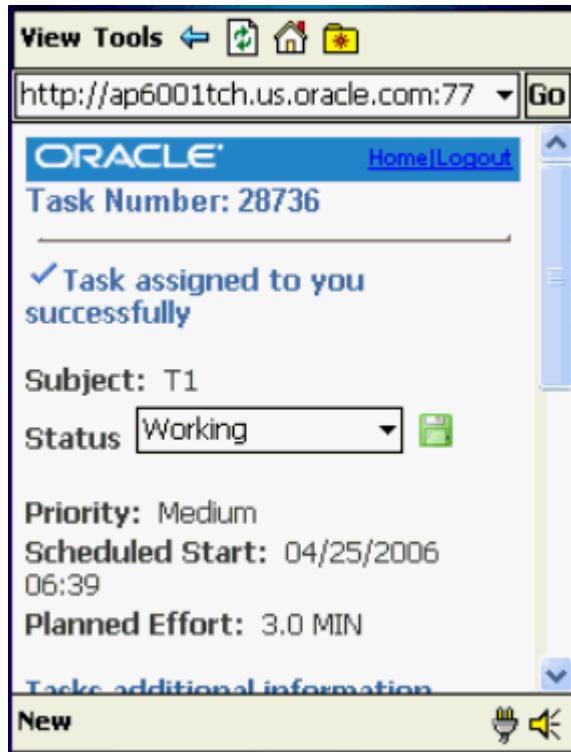


The task is assigned to the technician and the technician can begin to work on the task.

When the task is assigned, the task assignment status ID will appear by default from the profile option CSF: Default Working Task Status setting. See the *Oracle Mobile Field Service Implementation Guide*.

#### Example

For example, the task status is set to "Working".



## Self-Scheduling Tasks

In this option, the technician selects from the scheduling options provided by the system. The task is assigned to the technician.

Use this procedure to Self-Schedule a task:

### Prerequisites

- Advanced Scheduler must be implemented.
- A service request must exist. See [Creating a Service Request, page 6-23](#) or [Creating a Service Request from the Main Menu, page 6-25](#).
- A task or follow-up task must exist. See [Creating a Follow-Up Task, page 6-25](#).

### Steps:

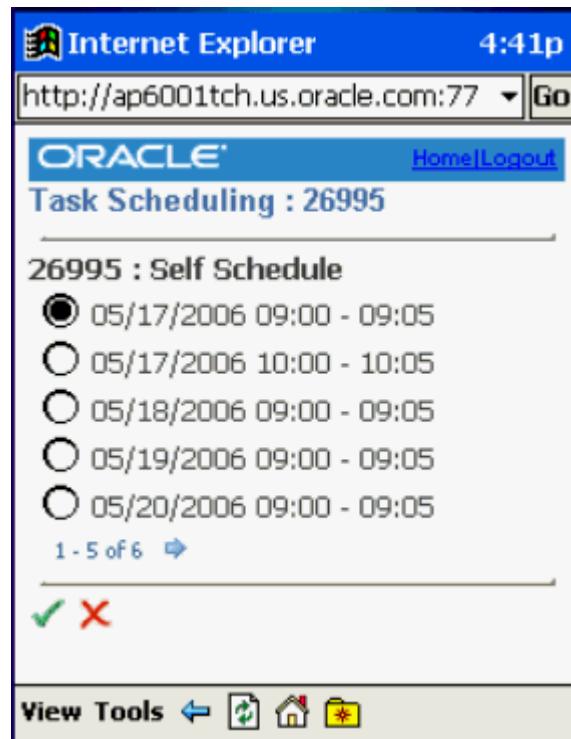
1. Select a task from the Today's Tasks list.  
See [Viewing Today's Tasks, page 6-8](#).
2. Select the Self Schedule option from the drop down menu, and then tap OK.

**Note:** Alternatively, when a created task already exists in the device with the task status of "In Planning", the technician can search for the task, select the task, and then select the Self Schedule option.

See Performing a Task Search, page 6-10.

Selecting the self schedule option provides the technician with several schedule options. The plans appear in ascending order according to cost.

The plan options that display depend on the value set for the Profile Option CSFW: Task Max. *See the Mobile Field Service Implementation Guide.*



3. After the technician selects a schedule option, the task is assigned to the technician.
4. When the task is assigned to the technician the task assignment status changes, depending on the value of the profile option "CSF: Default Assigned task status". *See the Mobile Field Service Implementation Guide.*

## Using Window to Promise to Schedule Tasks

Using the window to promise option, the technician provides the customer with plan option time slots, or "windows", to choose from. When the customer selects a window plan option, based on the plan option selected, and availability of resources and parts for the plan option selected, the dispatcher assigns a technician for the task. The same

technician may or may not be assigned for the task.

Use this procedure to use the windows to promise option to schedule tasks:

## Prerequisites

- Advanced Scheduler must be implemented.
- A service request must exist. See Creating a Service Request, page 6-23 or Creating a Service Request from the Main Menu, page 6-25.
- A task or follow-up task must exist. See Creating a Follow-Up Task, page 6-25.

### Steps:

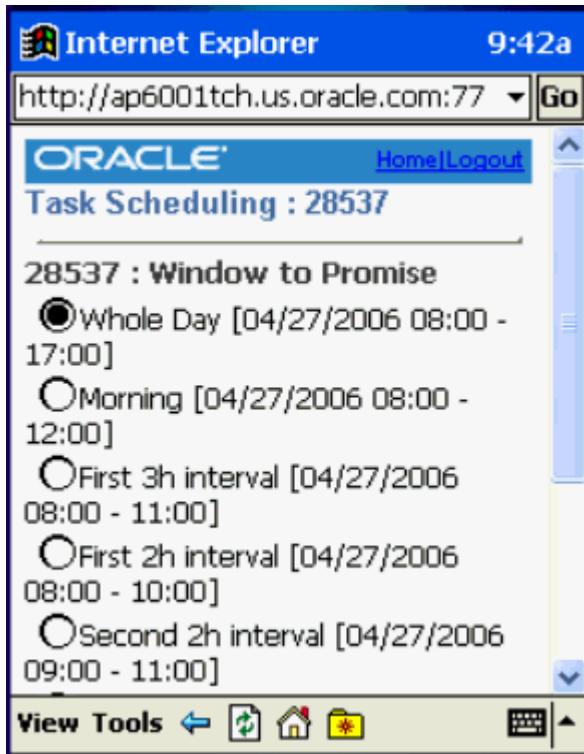
1. Select a task from the Today's Tasks list.  
See Viewing Today's Tasks, page 6-8.
2. Select the Window to Promise option from the drop down menu, and then tap OK.

**Note:** Alternatively, when a created task already exists in the device with the task status of "In Planning", the technician can search for the task, select the task, and then select the Self Schedule option.

See Performing a Task Search, page 6-10.

Selecting the window to promise option provides the technician and customers with several windows of time. The plans appear in ascending order according to cost.

The plan options that display depend on the value you set for Profile Option CSFW: Task Max. *See the Mobile Field Service Implementation Guide.*



3. After the customer selects an option, the task is assigned to the technician available for the windows option selected.
4. When the task is assigned the task assignment status changes, depending on the value of the profile "CSF: Default Planned task status for Planned task". See the *Mobile Field Service Implementation Guide*.

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

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

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

## Using the Intelligent Mode to Schedule Tasks

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

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

## Prerequisites

- Advanced Scheduler must be implemented.
- A service request must exist. See [Creating a Service Request](#), page 6-23 or [Creating a Service Request from the Main Menu](#), page 6-25.
- A task or follow-up task must exist. See [Creating a Follow-Up Task](#), page 6-25.

### Steps:

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

See [Viewing Today's Tasks](#), page 6-8.

2. Select the Intelligent option from the drop down menu, and then tap OK.

**Note:** Alternatively, when a created task already exists in the device with the task status of "In Planning", the technician can search for the task, select the task, and then select the Self Schedule option.

See [Performing a Task Search](#), page 6-10.

Selecting the Intelligent option provides the you and customers with several windows of technician and time. The plans appear in ascending order according to cost.

The plan options that display depend on the value you set for Profile Option CSFW: Task Max. See the *Mobile Field Service Implementation Guide*.

3. After the customer selects an option, the task is assigned to the technician available for the windows option selected.
4. When the task is assigned the task assignment status changes, depending on the value of the profile "CSF: Default Planned task status for Planned task". See the *Mobile Field Service Implementation Guide*.

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

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

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

## Viewing Install Base Product Configuration

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

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

- Instance maintenance.
- Instance-to-Instance. relationships
- History of all changes.

The Mobile Field Service - Wireless application enables a technician to view all the parent-child relationships related to a particular installed instance of an item. If, for example, a product (say a computer system) is installed at a customer site, and it is comprised of several other related components (monitor, hard drive, modem, and so on), then the install base view enables a technician to view the relationship between all of these components.

The wireless application provides support for internal assets. This functionality was developed to cater to the needs of the field service organizations that can provide service to internally owned assets as well as to customer products.

### Example

Typical examples of this case include:

- Demo or training equipment.
- Dispersed/Mobile assets, such as cell telephone towers.
- Mobile MRI vans.
- Leased copying machines.

Technicians can create tasks even when the service request incident address does not refer to a party site. This extends support for service of assets in locations that are not owned by or assigned to a specific party.

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

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

## Prerequisites

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

### Steps:

1. Navigate to the Task Details page.

Main Menu > Task Search > Task Details

Main Menu > Today's Task > Task Details

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

The Service Request screen appears.

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

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

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

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

## Making Mobile Queries

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

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

## Prerequisites

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

### Steps:

1. Tap the Mobile Query icon in the icon region.

The Mobile Queries screen appears.

2. Either tap a seeded query from the Query List LOV or tap an already saved query from the Query Name field.

3. Advance to the next screen, Submit Mobile Query.

A detailed description of the selected query appears in the Desc field. Then the cursor moves to the first query variable required.

4. Enter values for query variables until no more are required.

5. Tap the send icon to transmit your query.

When the enterprise has responded, a message appears in the Mobile Query Instances screen that says that a reply is available.

6. Tap the reply to display it in the mobile query results screen.

## Performing a Parts Search

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

After the appropriate parts are located, the Mobile Field Service - Wireless application enables the technician to make an internal transfer, create a move order transfer of parts, or to create an internal order.

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

The parts search functionality is a two-step process. First you locate the parts needed to fulfill the order, either through your own alternative sub-inventories, a coworker's sub-inventory, or the warehouse. Once you have located the parts, the next step is to place an order.

## Using Radius Search Capabilities

The Mobile Field Service - Wireless application leverages Oracle's geo-coding capabilities, which gives technicians the ability to limit the search for items from coworkers' trunk-stock to those coworkers who are within a specified radius. Radius

search is an optional feature of the Mobile Field Service - Wireless application. The measurement unit is set with the profile option "CSFW: Default Distance Unit," which enables you to set the distance unit for measurement purposes. The available values are: Mile or Kilometer.

To use the radius search capabilities, one of the technicians task must be in an assignment status of "Working" and the customer site must have a valid geo-code address. This enables the geo-code to determine where to begin the radius search. For coworkers to be considered in this search, they must also have valid geo-code installed at addresses.

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

Use the following procedures to perform a parts search.

## Prerequisites

- You must have ATP functionality enabled in Advanced Supply Chain Planning.
- You must set the profile CSP: Part Search Method at the Application level by selecting for the Application level a value of ATP, Inventory, or Spares Supply Chain. You must also set the CSP: Order Type profile option, which is used to provide a default value for order type when creating internal orders.
- Oracle Spares Management must also be installed.
- If you want to use radius search capabilities, a task must have the status of "Working," and geo-code functionality must be implemented.

### To Set Search Preferences:

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

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

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

4. Tap Go to save your preferences.

#### To Perform a Part Search:

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

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

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

2. Select the Item number, of the item you want to find.

The item description appears by default.

3. Enter the Quantity of the item you need. The quantity of 1 appears by default.
4. Tap **Add another item** to add the item to the Items Entered list and to start the definition of another item.
5. Enter a value for Need Date/Time.

If you launched this screen from the Task Details screen, then enter the scheduled start date and time of the task or the current date and time, whichever is later. Otherwise enter the current date and time.

6. Enter locational or positional information.

Distance represents the radius for the search from the Ship to Address or, if selected, your current address. Your current address is defined by the current task or GPS.

Address Type can be a task address, a technician address, or a customer address.

7. Select the sources in which you want to search for the item by selecting the appropriate check boxes.

The options are the same as those that you had when you defined your search preferences, and those preferences appear here by default.

8. If this screen shows a task associated with this search and you want to create a parts requirement for the parts and quantities listed, then tap Part Requirement.

The part requirement number appears on this screen.

9. Click Search to begin the search.

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

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

1. Select the Item number of the item you want to search for.

**Note:** Item is the only field required when performing an on hand quantity search.

2. Enter an item Revision number, if applicable. The Revision number field will not appear if the item has no revisions.
3. Select the On Hand option.

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

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

4. Click Search to begin the search.

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

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

## Creating a Parts Requirement

Complete the following steps to order a part:

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

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

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

3. Enter the Ship to address.

4. Select the desired part from the table.

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

The part you select appears in the New Order screen.

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

5. Click Order.

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

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

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

6. Click OK in the prompt.

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

7. Tap the Receive option to display the Receive Parts screen. In the Receive Parts screen, tap the Receive option to receive parts for all orders created for the task. For more information on receiving parts, see Receiving Parts, page 6-46.

## Ordering Parts

Using the Mobile Field Service - Wireless application, you order parts to replenish a technician's trunk stock or to fill a specific need for a particular customer. Ordering parts using this application leverages the Oracle Spares Management application. The ordering process is closely integrated with the search process and automates the creation of the appropriate type of order.

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

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

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

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

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

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

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

application:

## Prerequisites

- You must also set the "CSP: Order Type" profile option, which is used to provide a default value for order type when creating internal orders.

### To order a part:

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

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

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

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

The application determines the appropriate order type and generates it.

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

## Creating an Internal Transfer

In many field service operations, a technician may have multiple sub-inventories assigned to him within the same organization. The Mobile Field Service - Wireless application enables a technician to search all sub-inventories that reside in the same organization as the default sub-inventory for available parts. If a technician performs a parts search and finds that the necessary parts are in one of his other sub-inventories, he

can create an internal transfer.

## Creating a Move Order

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

**Note:** To create a move order, the coworker's sub-inventory must be in the same organization as the technician's default sub-inventory.

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

Follow this procedure to create a move order.

### Prerequisites

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

### Steps:

1. After you have performed the search for a part, navigate to the search results screen.  
This screen displays the item number, the name of the resource, the quantity available, the subinventory that contains the part, and the phone number.
2. Click on the hypertext linked name of the resource that you want to create the move order from.  
The Move Order screen appears. This includes the resource name and phone number, the source sub-inventory and the quantity of parts.
3. In the Destination field, select the sub-inventory that you want to receive the move order parts shipment.
4. Add any comments you want to the move order.
5. Click Create.

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

## Creating an Internal Order

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

You can include substitute and superseded parts in the search by selecting the Alternate Parts check box.

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

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

Use the following procedure to create an internal order.

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

### Steps:

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

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

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

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

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

4. Select a Need By Date for the parts.

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

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

6. Click Submit to create the internal order.

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

## Receiving Parts

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

### To Receive Parts:

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

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

2. Select a single order or reservation to view or receive.
3. Tap View to view the order or reservation.  
The Inbound Order screen appears.
4. Select the check box of the order lines whose balance due you want to cancel. A check box is disabled if a shipment is in transit.
5. Tap Apply to cancel the balance due on the selected order lines.
6. Tap Back to return to the Inbound Orders and Reservations screen.
7. Select the check box of any single order or reservation that you want to receive and tap Receive.

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

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

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

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

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

13. Enter or scan the serial numbers received.

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

14. Tap Next.

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

## Returning Parts

Excess parts are defined as those parts whose inventory balance is greater than the maximum level defined in the Authorized Stock List (ASL) in Spares Management. You can view the excess list information such as, item number, unit of measure, sub inventory, and condition type.

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

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

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

The following information displays on the Excess Return screen:

- Subinventory: This identifies the subinventory that contains the excess part.
- Condition: This displays whether the subinventory is for *usable* parts or *defective* parts.
- Return to: This displays the warehouse name and organization where the parts will be returned.

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

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

The excess parts information is generated by the scheduled Create Excess List concurrent program that is executed in Spares Management.

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

Use the following procedure to return parts:

## Prerequisites

- You must have Oracle Spares Management fully implemented.

### To Return Parts with a Consolidated Shipment:

1. From the Main Menu, tap Parts Returns.

Main Menu > Parts Return

The Parts Return screen appears. This screen displays all the sub-inventories assigned to you and all the parts contained in each of these sub-inventories. The title area of the screen includes the date that the return list was created.

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

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

3. Select the Consolidation check box.

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

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

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

5. Tap Next.

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

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

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

7. Tap Next.

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

8. Revise the information on this screen as needed:

- Destination Organization

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

- Destination Sub-Inventory

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

- Carrier  
Select a carrier.
- Shipping Method  
Select a shipping method.
- Waybill  
Enter a waybill.
- Shipment number  
Enter a shipment number or leave the field blank and the application will assign one.

9. Tap Create Order.

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

### To Return Parts without a Consolidated Shipment:

1. From the Main Menu, tap Parts Returns.

Main Menu > Parts Return

The Parts Return screen appears. This screen displays all the sub-inventories assigned to you and all the parts contained in each of these sub-inventories. The title area of the screen includes the date that the return list was created.

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

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

3. Clear the Consolidation check box.

Selecting this option means that each piece is a single shipment.

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

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

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

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

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

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

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

- Destination Organization

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

- Destination Sub-Inventory

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

- Carrier

Select a carrier.

- Shipping Method

Select a shipping method.

- Waybill

Enter a waybill.

- Shipment number

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

8. Tap Create Order.

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

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

## Transferring Parts

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

### To Transfer Parts:

1. Navigate to the Trunk Stock page. The Trunk Stock page appears.
2. Search for the trunk stock using the subinventory or subinventory and item as the search attributes.
3. Click the item link in the results region. The Item Details page appears.
4. Click the Transfer action link. The Parts Transfer page is displayed if there is any quantity available to transfer. This page displays item information, the source, and the destination for the item or part.
5. Choose a resource or the destination organization to transfer the parts to.

If you select a resource, the Destination Organization and Subinventory LOVs will display inventories and subinventories for which the selected resource is the owner.

You can select any inventory organization if you do not select a resource. The inventories displayed in the Destination Organization LOV are determined by the profile "CSF: Enable Destination Inventory Organization for Part Transfers." If the profile is set to Yes, then the Destination Organization LOV displays all valid organizations. If the profile is set to No, then the Destination Organization LOV is not displayed. In the latter case, the destination organization is the same as the source organization.

6. Click Done to initiate the transfer process.

## Viewing Project Details

The Task list screen is one of the main entry points into the application. This screen displays the tasks that are assigned to the technician.

Every task in the Task List screen displays the following information to help a technician get a quick glance of the task without going into the task details.

- Task Number
- Customer Name

- Customer Address
- Task Scheduled Date
- Task Subject
- Planned Effort

Tap any task to open the Task Details screen.

From the Task list screen, tap on a task to open the Task Details screen. This screen displays a technician's task assignment details. You can accept or reject an assignment by updating the task's status. This screen also enables you to capture travel and labor information and report parts used and recovered, create follow up tasks. In addition, this screen also helps you to search order parts, receive parts, and capture notes.

You can also view the project information for a task on the Task Details screen. The project details can also be viewed at the debrief line level. The details that you can view are as follows:

- Expenditure Org.

The expenditure organization of the project associated with the debrief line. The expenditure organizations are displayed based on the operating unit selected on the service request.

- Project Number

Number of the project. All project numbers belonging to the selected operating unit are displayed.

- Project Name

Name of the project

- Project Task Number

Number of the project task.

- Project Task Name

Name of the project task.

The project related fields are hidden out of the box and can be displayed on personalization.

# Accessing the Knowledge Base

## About the Knowledge Base

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

Through the Mobile Field Service - Wireless application, you can perform a general knowledge base search or you can perform a search related to a specific service request. In the latter scenario, after you choose a Knowledge Base solution, you can manually attach it to the service request and it can be viewed at any time.

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

The Mobile Field Service - Wireless application supports two search methods: Keyword Search and Search by Category. If you are searching the knowledge base for a specific service request, the Service Request Summary serves as the keywords in the keyword search field. You can change the keyword value, if necessary.

Category search is available only through the main menu.

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

**Note:** The Mobile Field Service - Wireless application supports only text-based messages. Any Knowledge Management solution that contains dynamic links or HTML pages will not appear in the search results.

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

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

### Steps:

1. Navigate to the task in which you want to perform a knowledge management search on.  
Main Menu > Task Search > Task Details > Request Number > Knowledge Base
2. From the task details page, click the hypertext Request Number associated to the task.

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

3. Click View in the Knowledge Base field.

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

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

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

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

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

6. If you want to attach this solution to the service request, click Link.

7. Once you have linked the Knowledge Base solution, click Done to exit.

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

## Getting Driving Directions

You can get driving directions to assist you in getting to customer sites or suppliers.

### To get driving directions:

#### Steps:

1. Tap the Get Direction icon from the toolbar.

The Driving Direction screen appears and contains a list of addresses from all the tasks that are scheduled for the system date.

2. Enter the starting address:

- Tap a link in the list to select it.
- Tap Work Address for help to select the work address.
- Tap Other to type in the starting address.

3. Enter the destination address by following a parallel procedure to that in step 2.
4. Tap OK.

The Driving Direction screen displays written directions and an associated map.

## Viewing and Saving an Offline Schedule

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

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

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

Use this procedure to view and save offline schedules.

### Steps:

1. Navigate to Today's Tasks.  
Main Menu > Today's Task
2. When the screen appears, use the application's "Save As" feature to save this page as a static html page.  
Save the page with a name you will recognize and save it to a local directory on the PDA.
3. If you receive an "Update Schedule" notification, indicating that your schedule has been updated (this includes any status change, or time/date change to a task) you can re-save your schedule using the same file name you used in Step 2.

## Managing Receipt of Shipments

The Oracle Mobile Field Service - Wireless application gives technicians the capability to view, confirm, and log as "completed" all their incoming part shipments. The main menu provides easy access to the list of shipments.

From the main menu, by navigating to the Receive Parts - Incoming Shipment screen, technicians can view a list of all shipments, which includes the shipment number, what organization the shipment came from, and the date shipped. By clicking a particular

shipment link, the technician can view the details about that shipment.

After technicians view and confirm that shipments have been received, they can select those shipments and mark them as completed.

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

#### **Steps:**

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

Main Menu > Receive Shipments

A list of incoming shipments is displayed.

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

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

3. If the shipment has been received, click Receive Complete.

4. Alternatively, from the main page, you can select the check box of all the shipments you have received and click Receive Complete.

## **Changing Passwords**

### **Password Change Information Shared Between MFS Wireless and MFS PPC**

Using the Change Password screen, you can change your password to access the Oracle Mobile Field Service - Wireless application.

#### **To Change a Password:**

1. Navigate Main Menu > Change Password.
2. Enter the current password.
3. Enter the new password.
4. Enter the new password in the Verify Password field.
5. Tap Done to change the password.

The password has been changed. You can use the new password the next time you access the Oracle Mobile Field Service - Wireless application.

## **Setting Up Search Preferences:**

1. From the main menu, click Preferences.

The Preferences page appears. The Oracle Mobile Field Service - Wireless application gives technicians the capability to set the search preferences for parts search.

2. Enter the search parameters and create saved parameters. You select the following search preferences:
  - Distance
  - My Inventory
  - Other Technicians
  - Manned Warehouses
  - Unmanned Warehouses
  - Include Alternate Parts
  - Include Closed
  - Use On-Hand
3. Click Done to save preferences.

## **Viewing Transaction History:**

1. From the main menu, click Transaction History.

The Transaction History page appears. This page enables you to enter search parameters such as; Subinventory, Transaction Type, Destination Organization, Destination Subinventory Transaction Date, Transaction Date Range, Transaction in Last Number of Days, and Item associated with the technicians sub-inventories.

2. Click the Search button. The Transaction History: Results page displays.

This page displays the transaction results based on your search parameters, with following information:

- From: Subinventory
- Transaction Type
- Destination

- Time
- Item
- Quantity

## Selecting Preferences

You can define several preferences in the application as follows:

- Modify formats, such as the date format, and views, such as the number of results to be shown
- Modify your default primary address and inactivate one of your active addresses
- Choose and change usable and defective default subinventories

### To Select General Preferences:

1. Navigate Main Menu > Preferences

The Preferences screen appears and displays items for which you can indicate a preference, usually by selection a value from a list of values or by tapping a radio button.

2. At the bottom of the screen, select from the LOV the preference type, which currently contains only the type Address & Subinventories.

Several items appear for which you can select a preferred value. The items include:

- Date format mask – The default date format followed in Field Service Wireless is : DD-MON-RRRR (31-DEC-1999).
- Default Distance Unit.
- Timezone – To set the time zone for the device.
  1. Set the profile "Enable Time Zone Conversions" at the server level.
  2. Set the time zone for the device using the device.
  3. Set the application time zone in the Preference screen.
- Home Page.
- Task Display1 – Task search result display column 1.
- Task display2 – Task search result display column 2.

- Task Display3 – Task search result display column 3.
- Task Max – Used for pagination in task search results and counter history results. Indicates the maximum number of records to be displayed at a time. Default: 7. This is displayed as a text box where you can enter your desired number.
- Attachment Size Limit – Specifies the maximum attachment size limit. Default: 1024.
- Use Icons for Buttons – Determines whether icons or buttons appear.
- Default subinventory and address.
- In addition to the common action buttons, the Resource Addresses and Subinventories preferences have an additional action button called Delete/Inactivate. Tap this button to deactivate the currently active address.

3. Tap Apply or Done to commit the changes.

# Part 4

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## Oracle Mobile Field Service Notifications



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# Using Mobile Field Service Notifications

This chapter covers the following topics:

- Using Notifications

## Using Notifications

All of the Oracle Mobile Field Service applications (Oracle Mobile Field Service Store and Forward - Pocket PC and Laptop, and Oracle Mobile Field Service Wireless) leverage Oracle Workflow to send task related notifications to technicians. Using Workflow you have the ability to send notifications to technicians when activity has occurred against high priority tasks that are associated to those technicians. Oracle provides three seeded task notifications but you can define additional notifications to meet your business requirements. The notifications that are provided are:

- New task assignment
- Task assignment deletion or cancellation
- Task rescheduling

The notifications that are sent to the technicians can be in several different formats. Formats include email, fax, or SMS (short messaging). These notifications provide the technician with all the details associated with the task that they are being notified about.

**Note:** The process that converts a message to SMS is handled by third party software. Workflow does not provide this functionality.

To use the notifications functionality, you must perform some setup. After you set up notifications, the system will immediately begin to send notifications of new task assignment, task assignment deletion or cancellation, and task rescheduling to the technicians depending on how you set up the notifications.

Follow this procedure to set up the notifications process:

## Prerequisites

- Oracle Workflow has been implemented and setup.
- Field Service Alerts and Notifications is setup and complete.

For more information on Oracle Workflow, see the *Oracle Workflow Administrator's Guide* and the *Oracle Workflow User's Guide*.

### To Set Up Notifications:

1. If using email, define the proper email address for the technicians:
  - Enter the email address for the technicians using the HRMS Employee windows.
  - If a Supplier Contract resource, enter the email address in the Supplier Contract details windows.
2. Run the Synchronize Workflow Roles concurrent program on a periodic basis.

When a resource is created or updated, the resource information including the email address, is stored in both Resource Manager and the corresponding Workflow role tables. Notifications can only be sent to all resources stored in Resource Manager that are in sync with the data stored in the Workflow roles tables. Resource Manager administrators must run this program on a periodic basis.

3. If using email, define the email style (HTML or text) for each technician using the Preferences window.

Navigation: Preferences SSWA > Preferences > Notification (Email Style)

4. Define the Profile Options associated with this functionality:
  - CSF: Default Accepted Task Status: The system will change the task assignment status to this status when selecting the **Accept** option from the notification.
  - CSF: Default Rejected Task Status: The system will change the task assignment status to this status when selecting the **Reject** option from the notification.
  - CSF: Alert Send Preference: The system uses this profile to calculate the send date for the notification. Values are:
    - During Shift: A notification will be sent immediately if the current time is within the shift duration. Otherwise, it will be sent at the beginning of the next day's shift start time.

The profile CSF: Alert before shift begins in minutes will determine the

number of minutes before the next day's shift that the notification will be sent.

- Immediate: A notification will be sent immediately. The system will ignore the profile option CSF: Alert before shift begins in minutes.
- Scheduled Day: A notification will be sent immediately if the task is scheduled for today. Otherwise, will the notification will be sent at the beginning of the task's scheduled day's shift start time minus the value for the profile CSF: Alert before shift begins in minutes.
- CSF: Alert before shift begins in minutes: The system uses this profile to determine the number of minutes before a shift start that a assignment notification should be sent to the technician.
- CSF: Alert Task Priority Level: Notifications will be sent only to tasks specified at this priority or above.
- CSF: Alert Response Due Time In Minutes: The timeout in minutes for the first create assignment notification.
- CSF: Alert Reminder Response Due Time in minutes: The timeout in minutes for the reminder create assignment notification.
- CSF: Enable Alerts: This value determines whether a technician receives Field Service alerts and notifications.
- CSF: Alert Auto Reject: The assignment should be rejected if the technician does not take any action on the notification before the due date.

5. Create a Background Engine request for an Item Type **Field Service Task Assignment Alerts** from the Oracle Application Manager Workflow Manager. Set the concurrent program to run on a periodic basis.

Navigation: Login as a system administrator. System Administrator > Workflow: Oracle Applications Manager > Submit Request for Background Engines



# A

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## Scheduling and Completing Tasks

This appendix covers the following topics:

- Introduction
- Conform to the Schedule
- Order of Task Completion
- General Operating Rules

### Introduction

The administrator can organize the Oracle Mobile Field Service application in several different ways, depending on how much control a field service technician is given over his schedule. This appendix describes several different levels of control for the field service technician.

### Conform to the Schedule

The field service technician can only work on one job at a time, and is given a schedule that the dispatcher plans. Take, for example, the following tasks:

- task 1: 8:00 a.m Installation at Customer A
- task 2: 9:00 a.m. Repair on-site at Customer B
- task 3: 10:00 a.m. Installation at Customer C

The field service technician first needs to finish task 1 before going on to task 2. He needs to follow the pre-defined order that the dispatcher has set. The field service technician cannot reschedule a task, but he can reject a task.

This setup gives the dispatcher control over the daily schedule of the field service technician. The dispatcher sets up the tasks, including what time and where the field service technician is to be at all times.

## Order of Task Completion

If you need to send more than one field service technician to perform a task, make sure that you schedule only one task assignment at a time, because multiple task assignments can lead to conflicts. For example, suppose you have a task that requires three field service technicians. You set up the task and then you send it to the task lists of all three field service technicians. It now appears on their task list. However, if one of your field service technicians changes the time for his task, that would affect the task list of the other two field service technicians. To avoid this, you would create three tasks, one for each field service technician.

The field service technician can complete his scheduled tasks under different scenarios. Those scenarios are:

### **Scenario 1: Complete Scheduled Tasks in Pre-Determined Order**

In this scenario, the field service technician works on one job at a time and conforms to the dispatched schedule.

### **Scenario 2: Complete One Scheduled Task at a Time in Any Order**

In this scenario, the field service technician works on one single job at a time and does not conform to the dispatched schedule.

### **Scenario 3: Complete Multiple Scheduled Tasks in Any Order**

In this scenario, the field service technician works on multiple jobs at a time and does not conform to the dispatched schedule.

Scenario 2 and Scenario 3 gives the field service technician control over his day. The dispatcher sends the tasks and locations to the field service technician, and the field service technician then decides when to perform each task. These scenarios work well in an environment where each task requires only one field service technician. For example, if a field service technician has a dental appointment, he can arrange the time he wants to be at the customer site near his dentist. The field service technician is expected to complete all the tasks on the day they were assigned. If he is unable to complete a scheduled task, he can reject it and then the dispatcher will re-schedule the task for the next day.

## General Operating Rules

This section describes some of the general operating rules of Oracle Mobile Field Service that may not be obvious. Some of these rules are based on the scenarios found in Order of Task Completion, page A-2.

The following are the general rules for working in Oracle Mobile Field Service:

- You can add notes, but you cannot update notes once they are completed.

- You can update and create debrief items for a task that does not have the status of completed or for a task that you have not yet synchronized with the enterprise system.

**Important:** Synchronized debrief lines cannot be updated.

See Understanding the Task List Screen, page 2-13 for a complete description of the task status flags.

- You cannot delete report items after they are synchronized.
- If several working tasks are synchronized in Scenario 1 or Scenario 2, you can work on both tasks until they are closed. Then you must handle your tasks in compliance to the profile setting.
- Scenario 1 will be the default when there is no profile set.
- Once you synchronize, you cannot update a signature.
- Once you complete or close a task, you cannot add counters.
- You cannot update counters.



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# Index

## A

---

Accepted task status, 3-23  
Accepted task status - Pocket PC, 2-21  
All Task for SR screen shot, 2-42  
Amount field, 2-75  
Assigned task status, 3-23  
attachment global icon - Pocket PC, 2-9  
attachment icon  
    Pocket PC, 2-27  
attachments  
    uploading - Pocket PC, 2-25  
Attachments For Task screen shot  
    Pocket PC, 2-25, 2-27

## B

---

buttons  
    Clear, 2-78  
    Counter, 2-79  
    Delete, 2-95  
    Delete (Labor Line screen), 2-60  
    Signed, 2-78  
    Today - Pocket PC, 2-17

## C

---

calendar bar screen shot - Pocket PC, 2-17  
Calendar screen shot - Pocket PC, 2-16  
Cancelled task status, 3-23  
Cancelled task status - Pocket PC, 2-21  
change column sequence  
    Mobile Field Service Store and Forward -  
    Pocket PC, 2-10

check boxes  
    New Mail, 2-95  
    Save Password, 2-99  
Clear button, 2-78  
Closed task status, 3-23  
Closed task status - Pocket PC, 2-21  
color  
    use in task list - Pocket PC, 2-15  
Completed task status, 3-23  
Completed task status - Pocket PC, 2-21  
complete global icon - Pocket PC, 2-8  
Computer Telephone Integration (CTI), 1-15  
Contract screen  
    read-only fields, 2-40  
Contract screen shot, 2-40  
Counter button, 2-79  
Create Parts Order drop-down list selection, 2-32  
Create Parts Requirement Goto menu selection, 2-81  
Create SR screen shot, 2-45  
Create Task screen shot, 2-31  
Creating Attachments to an Existing Service Request or Task procedure  
    Pocket PC, 2-26  
CRM Foundation  
    overview, 1-13  
CTI, 1-15  
Currency drop-down list, 2-75  
Customer Care  
    overview, 1-13  
customer flexfields, 2-37, 2-89, 2-90  
Customer Notes screen shot, 2-50  
Customer PO field, 2-47

Customer Product screen  
  read-only fields, 2-92  
Cust PO field, 2-37

## D

---

data search  
  Oracle Mobile Field Service Store and Forward - Pocket PC, 2-11  
data sort  
  Oracle Mobile Field Service Store and Forward - Pocket PC, 2-11  
date drop-down list  
  Pocket PC, 2-16  
debrief lines  
  add, 6-15  
Debrief screen shot, 2-44  
Delete button (Labor Line screen), 2-60  
Delete buttons, 2-95  
Description field, 2-40  
driving directions  
  on Pocket PC, 2-55  
  on wireless device, 6-55  
drop-down lists  
  Currency, 2-75  
  End, 2-32  
  Item, 2-64  
  Planned End, 2-31  
  Priority, 2-31  
  Problem, 2-37, 2-47  
  Resolution, 2-37  
  Start, 2-31  
  Status, 2-31, 2-47, 2-50, 2-50, 2-52  
  Type, 2-31, 2-37, 2-47, 2-50, 2-50, 2-52

## E

---

End Date field, 2-40  
End drop-down list, 2-32

## F

---

fields  
  Amount, 2-75  
  Contract screen read-only, 2-40  
  Customer Product screen read-only, 2-92  
  Cust PO, 2-37, 2-47  
  Description, 2-40

End Date, 2-40  
flexfields  
  customer, 2-90  
Labor, 2-60  
Name (Create Task screen), 2-31  
Number, 2-40  
Planned Effort, 2-31  
Product, 2-36  
Quantity, 2-75  
service request number, 2-36  
SR History screen read-only, 2-43  
SR screen read-only, 2-36  
Start Date, 2-40  
Summary, 2-45  
file-based synchronization  
  setting up, 4-25  
Find Material screen shot, 2-65  
flexfields  
  customer, 2-90  
flexfields global icon - Pocket PC, 2-8  
flexfields icon (customer), 2-89  
flexfields icon (service request), 2-37  
flexfields icon - Pocket PC, 2-22  
future task list  
  Pocket PC, 2-16

## G

---

global buttons screen shot, 2-7  
global functionality  
  Oracle Mobile Field Service Store and Forward - Pocket PC, 2-7  
global icons  
  left arrow, 2-92  
global icons - Pocket PC  
  attachment, 2-9  
  complete, 2-8  
  driving directions, 2-8  
  flexfields, 2-8  
  help, 2-9  
  home, 2-8  
  Knowledge Management, 2-8  
  left arrow, 2-8  
  log out, 2-9  
  mail, 2-9  
  mobile queries, 2-8  
  notes, 2-8

parts, 2-9  
search customer, 2-9  
synchronize, 2-8  
Goto menu, 2-83, 2-88  
Goto menu selections  
    Create Parts Requirement, 2-81  
    View Parts Requirement Status, 2-83  
Goto menu selections - Pocket PC  
    Search Tasks, 2-19  
    View Parts Requirement Status, 2-24

## H

---

help global icon - Pocket PC, 2-9  
hide, show, re-size columns  
    Mobile Field Service Store and Forward -  
    Pocket PC, 2-9  
home global icon - Pocket PC, 2-8

## I

---

icons  
    flexfields (customer), 2-89  
    flexfields (service request), 2-37  
    left arrow (global), 2-92  
icons - Pocket PC  
    attachment (global), 2-9  
    complete (global), 2-8  
    driving directions (global), 2-8  
    flexfields, 2-22  
    flexfields (global), 2-8  
    help (global), 2-9  
    home (global), 2-8  
    Knowledge Management (global), 2-8  
    left arrow (global), 2-8  
    log out (global), 2-9  
    mail (global), 2-9  
    mobile queries (global), 2-8  
    note, 2-21  
    notes (global), 2-8  
    parts, 2-24  
    parts (global), 2-9  
    search, 2-28  
    search customer (global), 2-9  
    synchronize (global), 2-8  
    undo, 2-24  
icons - Pocket PC  
    attachment, 2-27  
Interrupted task status - Pocket PC, 2-21

Item drop-down list, 2-64  
Item screen shot, 2-69  
Items screen shot, 2-46

## K

---

key benefits  
    Oracle Mobile Field Service - Wireless , 1-12  
key features  
    Mobile Field Service - Wireless, 1-11  
    Oracle Mobile Field Service Store and  
        Forward applications, 1-7  
knowledge base, 1-15  
Knowledge Management global icon - Pocket PC,  
2-8

## L

---

Labor field, 2-60  
left arrow global icon, 2-92  
left arrow global icon - Pocket PC, 2-8  
log out global icon - Pocket PC, 2-9

## M

---

mail global icon - Pocket PC, 2-8  
Material Line screen shot, 2-63  
Material screen shot, 2-67  
Mobile Application Foundation  
    overview, 1-13  
Mobile Field Service  
    Oracle Field Service process flow, 1-14  
mobile field service - wireless  
    parts requirement  
        create, 6-41  
Mobile Field Service - Wireless  
    key benefits, 1-12  
    key features, 1-11  
mobile queries  
    by e-mail, 5-1  
    by Pocket PC, 2-53  
    by wireless device, 6-36  
mobile queries global icon - Pocket PC, 2-8

## N

---

Name field (Create Task screen), 2-31  
navigation path  
    Oracle Mobile Field Service Store and

Forward - Pocket PC, 2-4  
New Mail check box, 2-95  
note icon - Pocket PC, 2-21  
notes global icon - Pocket PC, 2-8  
Number field, 2-40

## O

---

Oracle Advanced Scheduler  
overview, 1-13  
Oracle Field Service  
overview, 1-13  
process flow, 1-14  
Oracle Field Service Suite  
overview, 1-12  
Oracle Mobile Field Service  
applications compared, 1-3  
overview, 1-1  
Oracle Mobile Field Service Store and Forward applications  
key features, 1-7  
Oracle Mobile Field Service Store and Forward - Laptop  
overview, 1-1, 1-14  
Oracle Mobile Field Service Store and Forward - Pocket PC  
application overview, 2-2  
configurable display, 2-9  
configurable display - change column sequence, 2-10  
configurable display - hide, show, re-size columns, 2-9  
configurable display - restore default settings, 2-10  
data search, 2-11  
data sort, 2-11  
global functionality, 2-7  
launching, 2-6  
navigation path, 2-4  
overview, 1-1, 1-14, 2-2  
synchronize with enterprise system, 2-7  
today's task, 2-16  
uploading attachments, 2-25  
using calendar bar, 2-17  
using data search, 2-12  
viewing past or future task list, 2-16  
viewing task attachment, 2-24

working with task list, 2-12  
Oracle Mobile Field Service - Wireless  
overview, 1-2, 1-14  
technology supported, 1-2  
Oracle Spares Management  
overview, 1-13  
Oracle Web-to-go icon, 3-4, 4-3

## P

---

parts global icon - Pocket PC, 2-9  
parts icon - Pocket PC, 2-24  
past task list  
Pocket PC, 2-16  
performing a data search procedure: Pocket PC, 2-12  
personal task  
create, 2-32  
personal task, definition of, 2-32, 3-35  
Planned Effort field, 2-31  
Planned End drop-down list, 2-31  
preferences  
selecting, 6-59  
Priority drop-down list, 2-31  
Problem drop-down list, 2-37, 2-47  
procedure  
creating attachments to an existing service request or task - Pocket PC, 2-26  
Pocket PC: Performing a data search, 2-12  
using date drop-down list - Pocket PC, 2-16  
viewing a task attachment - Pocket PC, 2-24  
procedures  
viewing and changing task information - Pocket PC, 2-18  
process flow  
Oracle Field Service, 1-14  
Product field, 2-36  
Product Notes screen shot, 2-50  
profiles  
Service:  
Inventory Validation Organization, 1-9  
project details  
view, 6-52

## Q

---

Quantity field, 2-75

## R

---

Rejected task status, 3-23  
Rejected task status - Pocket PC, 2-21  
Resolution drop-down list, 2-37  
restore default settings  
    Mobile Field Service Store and Forward -  
    Pocket PC, 2-10

## S

---

Save Password check box, 2-99  
screen drop-down list selections  
    Create Parts Order, 2-32  
screen shot  
    Attachments For Task - Pocket PC, 2-27  
screen shots  
    All Task for SR, 2-42  
    Attachments For Task - Pocket PC, 2-25  
    Calendar: Pocket PC, 2-16  
    calendar bar - Pocket PC, 2-17  
    Contract, 2-40  
    Create SR, 2-45  
    Create Task, 2-31  
    Customer Notes, 2-50  
    Debrief, 2-44  
    Find Material, 2-65  
    global buttons - Pocket PC, 2-7  
    Item, 2-69  
    Items, 2-46  
    Material, 2-67  
    Material Line, 2-63  
    Part Search, 2-82  
    Product Notes, 2-50  
    Search Result - Pocket PC, 2-21  
    Search Task - Pocket PC, 2-20  
    Service Request, 2-38  
    SR, 2-36  
    SR History, 2-43  
    SR Notes, 2-50  
    Task Additional Information - Pocket PC, 2-23  
    Task List, 2-6  
    Task List - Pocket PC, 2-12  
    Task Notes, 2-50  
    Task - Pocket PC, 2-18  
SDK, 1-10  
search customer global icon - Pocket PC, 2-9

search icon - Pocket PC, 2-28  
Search Result screen shot - Pocket PC, 2-21  
Search Task screen shot - Pocket PC, 2-20  
Search Tasks Goto menu  
    Pocket PC, 2-19  
Service profiles  
    Inventory Validation Organization, 1-9  
service request number field, 2-36  
Service Request screen shot, 2-38  
Signed button, 2-78  
Software Development Kit (SDK), 1-10  
SR History screen  
    read-only fields, 2-43  
SR History screen shot, 2-43  
SR Notes screen shot, 2-50  
SR screen  
    read-only fields, 2-36  
SR screen shot, 2-36  
Start Date field, 2-40  
Start drop-down list, 2-31  
Status drop-down list, 2-31, 2-47, 2-50, 2-50, 2-52  
Summary field, 2-45  
synchronization  
    file-based, 4-25  
synchronize global icon - Pocket PC, 2-8  
system tray, 3-4, 4-3

## T

---

task, definition of, 2-12  
Task Additional Information screen shot  
    Pocket PC, 2-23  
task attachment - Pocket PC  
    viewing, 2-24  
task information  
    viewing and changing - Pocket PC, 2-17  
task list - Pocket PC  
    overview, 2-13  
    task list screen table, 2-14  
    task statuses, 2-14  
    use of color, 2-15  
    working with, 2-12  
Task List screen shot, 2-6  
Task List screen shot: Pocket PC, 2-12  
Task Notes screen shot, 2-50  
Task screen - Pocket PC  
    read-only information, 2-18

Task screen shot - Pocket PC, 2-18

task statuses

Accepted, 3-23

Assigned, 3-23

Cancelled, 3-23

Closed, 3-23

Completed, 3-23

order of progression, 3-23

Pocket PC, 2-14

Rejected, 3-23

Working, 3-23

task statuses - Pocket PC

Accepted, 2-21

Cancelled, 2-21

Closed, 2-21

Completed, 2-21

Interrupted, 2-21

order of progression, 2-15

Rejected, 2-21

Working, 2-21

Today button

Pocket PC, 2-17

Type drop-down list, 2-31, 2-37, 2-47, 2-50, 2-50,

2-52

## **U**

---

undo icon - Pocket PC, 2-24

## **V**

---

viewing and changing task information

procedure

Pocket PC, 2-18

viewing a task attachment procedure - Pocket  
PC, 2-24

View Parts Requirement Status Goto menu  
selection, 2-83

Pocket PC, 2-24

## **W**

---

Web-to-go icon, 3-4, 4-3

Working task status, 3-23

Working task status - Pocket PC, 2-21