Oracle® Mobile Field Service

User Guide

Release 11*i*

Part No. B14365-01

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For this release, the former *Oracle Mobile Field Service User Guide for Laptops* and *Oracle Mobile Field Service User Guide for Pocket PCs* have been merged into the *Oracle Mobile Field Service User Guide*.

Use this guide when using either Oracle Mobile Field Service/Laptop or Oracle Mobile Field Service/Pocket PC.

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Oracle Mobile Field Service User Guide, Release 11*i*

Part No. B14365-01

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Contents

1   Understanding Oracle Mobile Field Service

Part I   Oracle Mobile Field Service/Pocket PC

2   Installing Oracle Mobile Field Service/Pocket PC

3   Using Oracle Mobile Field Service/Pocket PC

Part II   Oracle Mobile Field Service/Laptop

4   Installing Oracle Mobile Field Service/Laptop

5 Using Oracle Mobile Field Service/Laptop

A Scheduling and Completing Tasks

Index

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Oracle Mobile Field Service User Guide, Release 11*i*

Part No. B14365-01

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Preface

Welcome to Release 11*i* of the *Oracle Mobile Field Service User Guide*. This guide describes how to use the Oracle Mobile Field Service product. It also describes the application components, key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications. Because Oracle Mobile Field Service can be installed on a laptop computer or Pocket PC, this guide covers both **Oracle Mobile Field Service/Laptop** and **Oracle Mobile Field Service/Pocket PC**. These applications are store-and-forward types built upon Oracle9*i* Lite database technology and designed for offline usage.

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

- The principles and customary practices of your business area.

- Oracle Mobile Field Service.

  If you have never used Oracle Mobile Field Service, Oracle suggests you attend one or more of the Oracle Mobile Field Service training classes available through Oracle University.

- The Oracle Applications graphical user interface.

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

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

The *Oracle Mobile Field Service User Guide* describes how to use Oracle Mobile Field Service. The guide is composed of the following:

- Chapter 1, "Understanding Oracle Mobile Field Service" describes what Oracle Mobile Field Service is and how to administer it. This chapter also describes how the application is structured and how you can navigate in it.

- Part I, "Oracle Mobile Field Service/Pocket PC" contains the chapters that describes the installation and usage of Oracle Mobile Field Service/Pocket PC.

- Chapter 2, "Installing Oracle Mobile Field Service/Pocket PC" describes what is needed to install and use the Oracle Mobile Field Service/Pocket PC application. It also describes how to launch the application.

- Chapter 3, "Using Oracle Mobile Field Service/Pocket PC" describes how to use Oracle Mobile Field Service/Pocket PC to process service requests and tasks.

- Part II, "Oracle Mobile Field Service/Laptop" contains the chapters that describes the installation and usage of Oracle Mobile Field Service/Laptop.

- Chapter 4, "Installing Oracle Mobile Field Service/Laptop" describes what is needed to install and use the Oracle Mobile Field Service/Laptop application. It also describes how to launch the application.

- Chapter 5, "Using Oracle Mobile Field Service/Laptop"describes how to use Oracle Mobile Field Service/Laptop to process service requests and tasks.

- Appendix A, "Scheduling and Completing Tasks" describes the different levels of control the field service representative can exercise when doing his job.

Typographic Conventions

The following table describes the typographical conventions used in this manual:

Conventions	Explanation
italics	Introduces new terms that you may not be familiar with, and is used occasionally for emphasis.
bold	Emphasizes important information. Also indicates button or option selections. For example, tap **Next**.

Conventions	Explanation
UPPERCASE	Indicates the name of a file. For operating environments that use case-sensitive file names, the correct capitalization is used in information specific to those environments.
	Also indicates keys or key combinations that you can use. For example, press the ENTER key.
`monospace`	Indicates syntax examples, values that you specify, or results that you receive.
`monospaced italics`	Indicates names that are placeholders for values; for example, *`filename`*.
`>`	Indicates a selection from a menu. For example, `Start > Programs > Oracle for Windows NT > Web-to-Go`

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/

Other Information Sources

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

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

Online Documentation

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

- **PDF Documentation** - See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.

- **11i Release Content Document -** Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle*MetaLink*.

- **About document -** Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on Oracle*MetaLink*.

Related Documentation

Oracle Mobile Field Service/Pocket PC shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Mobile Field Service/Pocket PC.

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

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

Guides Related to All Products

Oracle Applications User's Guide

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

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

Guides Related to Oracle Mobile Field Service

Oracle Mobile Field Service Implementation Guide

This guide explains how to implement and administer the Oracle Mobile Field Service application, for either a laptop computer or Pocket PC. It covers software and hardware requirements, dependencies, implementation tasks, implementation verification, diagnostics and troubleshooting, administrative tasks, and migration tasks.

Installation and System Administration Guides

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Upgrading Oracle Applications

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

"About" Document

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

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and

others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Alert User's Guide

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

Useful Implementation Documentation

Oracle Applications Product Update Notes

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

Oracle Workflow User's Guide

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Training and Support

Training

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

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

Support

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

1

Understanding Oracle Mobile Field Service

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

1.1 About Oracle Mobile Field Service

Oracle Mobile Field Service is part of the Oracle Field Service suite of products. (See the "Overview of the Oracle Field Service Suite" on page 1-2 for complete details.) This application is a disconnected-solution that enables a field service representative to service a customer in a fully automated and computer-efficient way. This means that schedules are received and updated in a timely manner and service requests are resolved quickly.

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

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

1.2 Overview of the Oracle Field Service Suite

The Oracle Field Service suite supports an automated process used by service organizations 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 organization's business needs. The following table lists all the products in the suite.

Suite Application	Description
Customer Care	Customer Care is not really a product of the Oracle Field Service suite but the Service Request form is delivered with the Oracle Field Service application. The Service Request form takes the customer's call for service and creates a service request.
CRM Foundation	The products in CRM Foundation are essential to use Oracle Field Service. They are used to create tasks, territories, define resources, and help in the assignment of tasks to resources. CRM Foundation comes with Oracle Field Service.
Oracle Field Service	This application assists in assigning tasks to service representatives, creating and dispatching daily schedules, monitoring progress, and reporting on material, expense, and labor transactions.
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.
Spares Management	This application is used to provide 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.

Suite Application	Description
Oracle Mobile Field Service/Laptop	This application is a disconnected application typically installed at a service representative's laptop to receive his daily schedule and report on progress, material, expense, and labor.
Oracle Mobile Field Service/Pocket PC	This application is a disconnected application for a Pocket PC so field service representatives can receive their daily schedule and report on progress, material, expense, and labor.

1.3 The Oracle Field Service Process

The field service process has six basic steps. This process starts with the creation of a service request. The service request has at least one task, which is completed by a field service representative in the field. After completing a task, the field service representative 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 representative and home office. 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 report a request for service. The customer can create the request by using the Web, Computer Telephone Integration (CTI), e-mail, or by dialing into a call center where an agent takes the call. A service request can also be created by a field service representative through a project or by a sales order (installation of a product). When the request is received, 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 a field visit. The service request is analyzed by a support agent who searches the knowledge base for a solution. As an outcome of this process, the request may 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 customer product can be created automatically from a service contract or sales order.

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

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

The component in step 4, Service request delivery and reporting, can be applied using Oracle Mobile Field Service. In this application, the schedule is received by the service representative on his Pocket PC. He records counter readings and reports on material used, labor time, and expenses incurred.

1.4 Navigation Path of Oracle Mobile Field Service/Pocket PC

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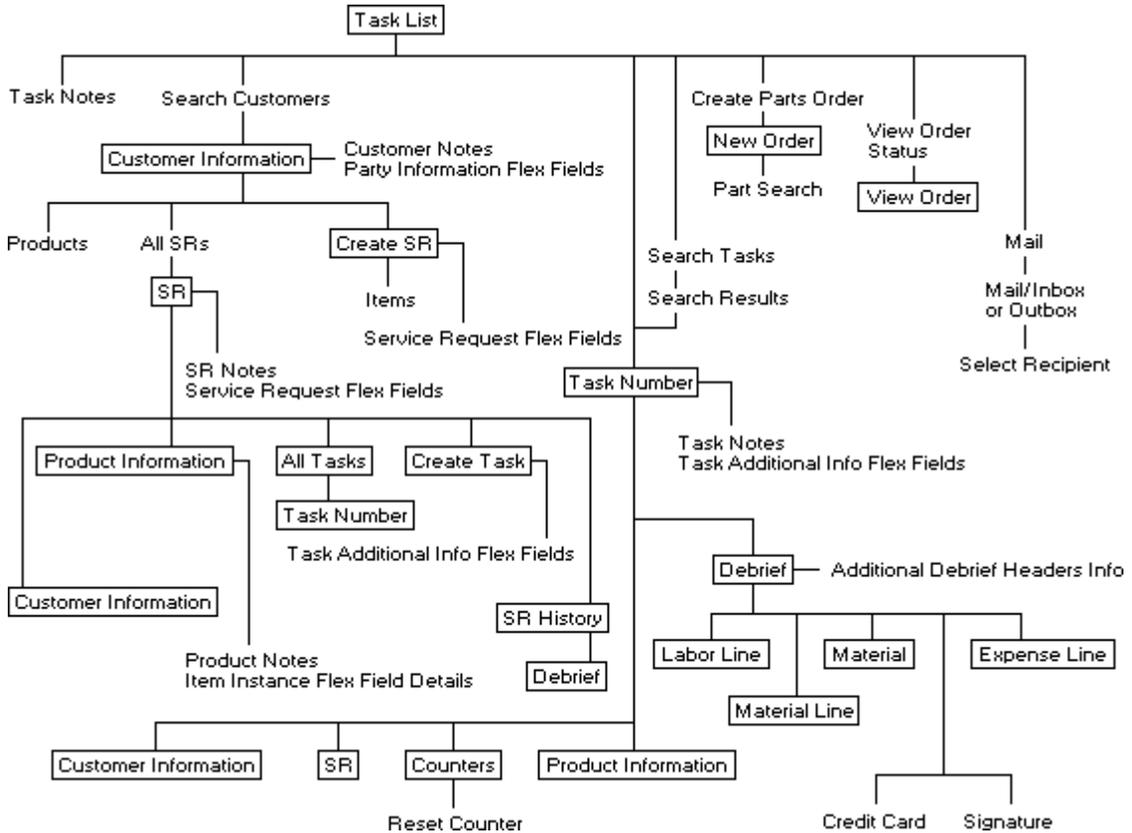
In Oracle Mobile Field Service, there are screens with and without global functionality. A screen that has global functionality contains various global icons in the lower portion of the screen. See "Using Global Functionality" on page 3-5 for further details. In the above diagram, text within a rectangle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

The Task List screen is where you start in Oracle Mobile Field Service/Pocket PC. The Task List screen is the "Home" screen. From this screen, you can access your tasks for the current day or all the tasks assigned to you, both past, present, and future. From the Task List screen, you can locate a desired task by either opening

the Search Customers screen to access the task for a desired customer or you can open the Search Task screen to access the desired task. Also from the Task List screen, you can create a part order in the New Order screen and then monitor the part order status in the View Order screen. Other functions you can perform from the Tasks List screen include viewing and creating notes, opening the Task screen, and accessing the Mail Inbox and Outbox.

A task is described in the Task screen. 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.

The SR screen is where 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 Customer Information screen is where you can view the customer's address and access and create customer notes and any Party Information flexfields. From this screen, you can also access the All Products, All SRs, and Create SR screens.

From the Debrief screen, you can access any Additional Debrief Headers Info flexfield information. Also from this screen, you can open the Credit Card and signature screens. The Debrief screen is where 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, reset, 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.

1.5 Navigation Path of Oracle Mobile Field Service/Laptop

The following diagram shows the high-level structure of the Oracle Mobile Field Service/Laptop application.

Login
— Preferences, Synchronize, Logout, Help

Home
Calendar
Information
Messaging

Home:
Statistics
Shift

Calendar:
Daily view
Weekly view

Daily view:
Update task status
Create personal task

Information (Weekly view):
Task details
Reporting
Service history
Counters
Customer details
Service request details
Contract details
Quick debrief

Information:
Request / Task:
Customer
Product
Labor time report
Material report
Expense report
Create task
Contract details
Service history

Customer:
Request / task
Install base
Create request

Product:
Customer products
Items*
Inventory*

Messaging:
Receiving
Sending

* You can order parts to replenish your subinventory. Also, you can transfer parts across subinventories. See "Ordering a Part" on page 5-85 for a complete description of these procedures.

The Preferences, Synchronize, Logout, and Help text in the above figure represents the global buttons. See "Global Button Functionality" on page 5-100 for complete details. The Home, Calendar, Information, and Messaging headers in the above figure represent the four navigational tabs in the Oracle Mobile Field Service/Laptop application. The Home page is where you view how many tasks on your laptop computer are at a particular status. The Calendar page is where you view all of the scheduled tasks assigned to you for either the day or week, depending on the view you are in. The Information page is the central point for

finding all the information about customer, service requests, and tasks. The Messaging page is where you send and receive messages to other people within your organization. See the appropriate sections in this guide for more details about each page.

Part I

Oracle Mobile Field Service/Pocket PC

This part contains the following chapters that describes the installation and usage of Oracle Mobile Field Service/Pocket PC:

-
-

2

Installing Oracle Mobile Field Service/Pocket PC

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

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

2.1 Minimum Hardware Requirements

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

2.1.1 Desktop PC Hardware Requirements

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

- Computer: IBM-compatible with Pentium I processor

- Disk space: 50 MB free space

- Monitor: 256 color display

- RAM: 32 MB

- Other requirements: serial port, Internet connection, mouse or pointer device

2.1.2 Pocket PC Hardware Requirements

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

- Pocket PC 2000, Pocket PC 2002, Pocket PC 2003 device

- Processor supported:

    - ARM

    - XScale

- 16 MB RAM

2.2 Minimum Software Requirements

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

2.2.1 Desktop PC Software Requirements

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

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

- ActiveSync 3.6 and above

2.2.2 Pocket PC Software Requirements

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

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

2.3 Minimum Pocket PC Communication Requirements

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

- Wired modem
- Wireless modem

2.4 Installing the Application on Your Pocket PC

For the minimum hardware and software requirements for a Pocket PC, see "Minimum Hardware Requirements" on page 2-1 and "Minimum Software Requirements" on page 2-2.

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

Procedure	Performed At
1. Downloading and Installing the Oracle9i Lite Setup Program	Client PC (the PC that the Pocket PC HotSyncs to)
2. Configuring mSync on the Pocket PC	Pocket PC
3. Performing a Full Synchronization	Pocket PC
4. Launching Oracle Mobile Field Service/Pocket PC	Pocket PC

2.4.1 Downloading and Installing the Oracle9*i* Lite Setup Program

Perform this procedure from the client PC desktop. In this procedure, you will download the mobile client from the Mobile Server and install the Oracle9i Lite setup program.

Steps

1. Open your browser.

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

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

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

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

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

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

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

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

   The Setup program downloads all the required components.

2.4.2 Synchronizing the Client Desktop PC with the Pocket PC

Complete this procedure to synchronize the client desktop PC with the Pocket PC. This synchronization puts the Oracle9*i* Lite components, Oracle Mobile Field Service/Pocket PC, and the database on the Pocket PC.

Steps

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

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

3. Start Microsoft ActiveSync and then install Oracle9*i* Lite.

   Choose Tools > Add remove > [processor type], where [processor] is either SH3, SH4 or ARM.
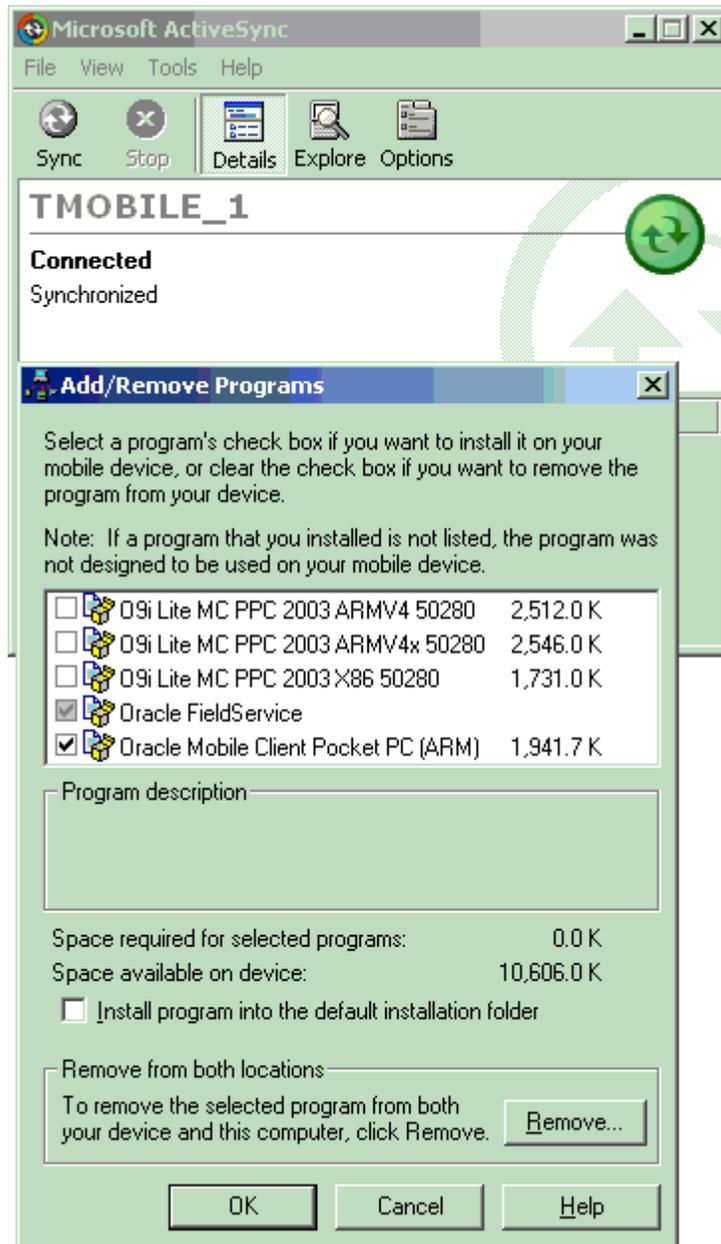
4. Perform an ActiveSync to put Oracle9*i* Lite components on the Pocket PC.

> **Note:** To do an ActiveSync to retrieve Oracle Mobile Field Service/Pocket PC itself and the data associated with it, the computer that hosts the ActiveSync manager must be able to connect to the mobile server using HTTP. Therefore, You must be able to connect to the mobile server through HTTP.

You can also retrieve the application and copy the data onto the Pocket PC by connecting to any of the following modes:

- Wireless

- Infrared

- USB

- ActiveSync

- Modem

2.4.3 Configuring mSync on the Pocket PC

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

Steps

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

   The Programs screen opens.

2. Tap the File Explorer icon.

   The My Documents screen opens.

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

   The My Device screen opens.

4. Tap the Orace folder.

   The Orace screen opens containing the mSync file

5. Tap on the mSync file to open it.

   The mSync screen opens.

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

Information	Description
User Name	mSync client user name. This is case insensitive. (This is the Mobile Field Service username.)
Password	mSync client password. This is case insensitive.
Change check box	Leave this check box deselected.
Save Password check box	Select this check box to save the mSync username and password.
Server	IPaddress:port
Use Proxy	Select this check box if appropriate.
Force Refresh	Leave this check box deselected.

2.4.4 Performing a Full Synchronization

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

Steps

Complete the following steps to perform a full synchronization:

1. Ensure that you are connected to the network.

2. Tap **Sync** to start the synchronization.

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

2.4.5 Launching Oracle Mobile Field Service/Pocket PC

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

Steps

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

   The Programs screen opens.

2. Tap the File Explorer icon.

   The My Documents screen opens.

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

   The My Device screen opens.

4. Tap the Orace folder.

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

5. Click on `Fieldservice.exe`.

   The Oracle Mobile Field Service/Pocket PC opens.

2.4.6 Creating a Shortcut for Oracle Mobile Field Service/Pocket PC

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

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

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

2. Choose the Copy option.

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

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

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

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

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

2.5 Subsequent Synchronizations

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

Steps

1. Go to the Oracle Mobile Field Service application.

2. Go to the home page of the application.

3. Click on the mSync icon.

3

Using Oracle Mobile Field Service/Pocket PC

This chapter describes how to use Oracle Mobile Field Service/Pocket PC to process service requests and tasks. This 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
- Record credit card information
- View customer product information

3.1 Application Overview

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

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

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

1. Launch Oracle Mobile Field Service/Pocket PC

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

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

    See "Synchronizing with the Enterprise System" on page 3-91.

3. Review your calendar for the day.

    See "Working with Your Task List" on page 3-6.

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

    See "Viewing and Changing Task Information" on page 3-11.

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

    See "Viewing and Changing Task Information" on page 3-11.

6. Learn the customer address.

    See "Viewing Customer Information" on page 3-79.

7. Review service request information.

    See "Working with Service Requests" on page 3-21

    - Review contract information.

        See "Viewing Contract Information" on page 3-27.

    - Review service history information.

        See "Viewing Service Request History" on page 3-29.

    - Create or update a customer note if necessary.

See "Creating and Viewing a Note" on page 3-35.

8. Set any counter and counter properties.

   See Counter Readings on page 3-69.

9. Report task details.

   See "Debrief Reporting" on page 3-40.

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

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

    See "Closing the Application" on page 3-93.

3.2 Launching Oracle Mobile Field Service/Pocket PC

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

Steps

1. Choose Start > FieldService.

Oracle Mobile Field Service/Pocket PC opens in the Task List screen. This screen is the starting point in the Oracle Mobile Field Service/Pocket PC application. See "Working with Your Task List" on page 3-6 for a complete description of the Task List screen.
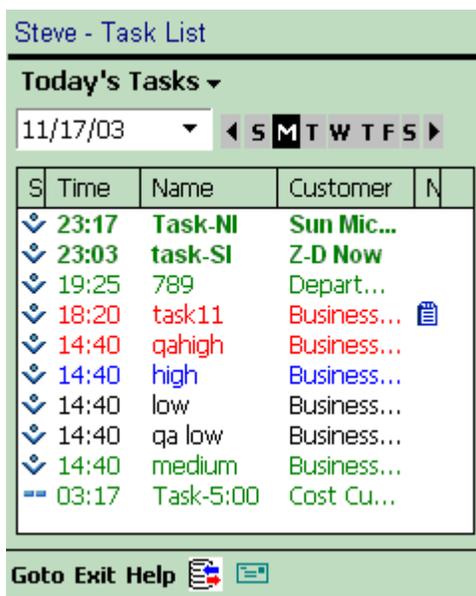
2. Tap the synchronization icon in the lower portion of the screen to synchronize Oracle Mobile Field Service/Pocket PC with the enterprise system.

See "Synchronizing with the Enterprise System" on page 3-91 for a complete description of this procedure.

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

3.3 Using Global Functionality

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

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

The global icons perform the following functions:

Tap the home icon to go to the Task List screen (see "Working with Your Task List" on page 3-6)

Tap the notes icon to create or view notes (see "Creating and Viewing a Note" on page 3-35)

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

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

Tap the left arrow icon to return to the previous screen

Tap the synchronize icon to synchronize Oracle Mobile Field Service/Pocket PC with the enterprise system (see "Synchronizing with the Enterprise System" on page 3-91)

Tap the parts icon to perform spares management (see "Spare Parts Management" on page 3-73)

Tap the attachment icon to view attachments for either a task or service request (see "Viewing a Task Attachment" on page 3-16 and "Viewing a Service Request Attachment" on page 3-26)

Tap the mail icon to access messaging (see "Messaging" on page 3-88)

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

3.4 Working with Your Task List

The Task List screen is the starting point in the Oracle Mobile Field Service/Pocket PC application. The Task List screen lists non-closed tasks in descending order based on the scheduled date and time stamp. See "Viewing a Past or Future Task List" on page 3-8 to view the tasks for a different day.
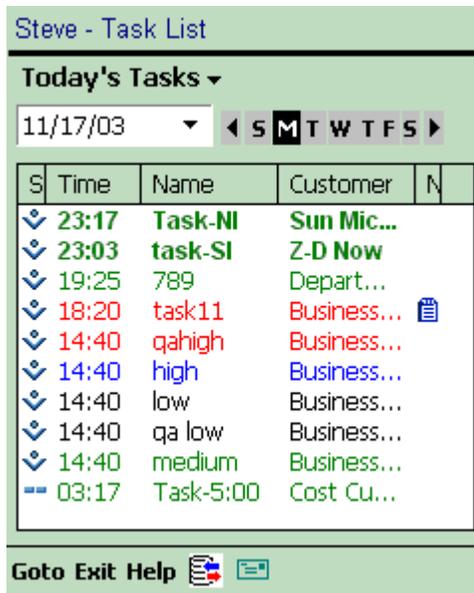
3.4.1 Understanding the Task List Screen

The Task List screen is updated each time you synchronize with the enterprise system. See "Synchronizing with the Enterprise System" on page 3-91 for a complete description of this procedure.

You can to do the following from the Task List screen:

- View tasks for the day

- View all tasks assigned to you, past, present, and future

- Access information for a selected task

- Search for an assigned task

- Search for a customer for which you are assigned tasks

- Create a parts requirement

- View parts requirement status

- Create a personal task

- View the on-hand quantity of parts

3.4.1.1 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

If you tap in either the Status, Time, or Name column, Oracle Mobile Field Service/Pocket PC opens the Task screen for a task. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen. If you click in the Customer column, Oracle Mobile Field Service/Pocket PC opens the Customer screen for a task. See "Viewing Customer Information" on page 3-79 for a complete description of this screen. Finally, if you click in the Notes column, Oracle Mobile Field Service/Pocket PC opens the Task Notes screen for a task. See "Creating and Viewing a Note" on page 3-35 for a complete description of this screen.

3.4.1.2 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 an "Accepted" task, change its status to "Completed".

See "Viewing and Changing Task Information" on page 3-11 to learn how to change the status of a task.

3.4.1.3 The Use of Color in the Task List Screen

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

- Red—priority 1

- Blue—priority 2

- Green—priority 3

- Black—priority 4

3.4.2 Viewing a Past or Future Task List

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

- Using the date drop-down list

- Using the calendar bar

3.4.2.1 Using the Date Drop-down List

Steps

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

1. Tap the date drop-down list.

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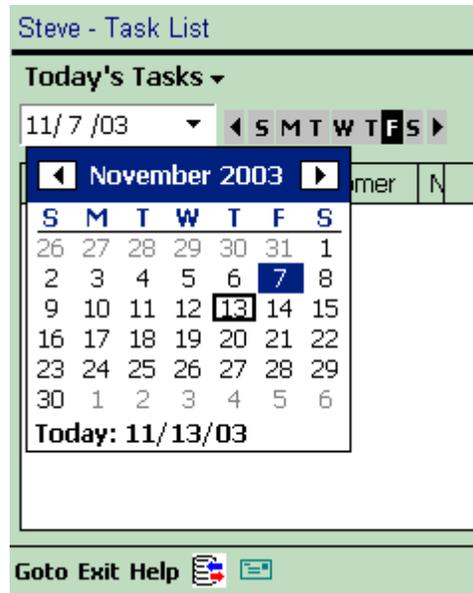
2. To change the month or year, tap the left and right arrows at the top of the calendar.

   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 pop-up list.

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

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

3.4.2.2 Using the Calendar Bar

Steps

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

■ To change the day for the active week, tap the desired day of the week in the calendar bar.

◀ S M **T** W T F S ▶

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

- 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 your are currently displaying on the Task List screen.

3.5 Working with Tasks

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 representative 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.

Update task status in order to keep your schedule up to date and to inform the dispatcher on the progress of your schedule. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this procedure.

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

3.5.1 Viewing and Changing Task Information

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

- Tasks
- Service requests
- Customers
- Task notes
- Debriefs and counters
- Customer products

Prerequisites

- Opening a task from the Task List screen. See "Working with Your Task List" on page 3-6 or "Viewing All Tasks for a Service Request" on page 3-28, respectively.

Steps

Complete the following steps to view and change task information:

1. Navigate to the Task screen.

   Use one of the following means to open the Task screen:

   Open a Task Directly:

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

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

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

Read-only Information	Description
Task Number	Located in the screen title, this is a generated number for a task.
Customer field	Located in the screen title, this is the name of the customer. Tap this field to view additional customer product information. See "Viewing Customer Information" on page 3-79 for a complete description of this procedure.
Name field	The name of the task.
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" on page 3-84 for a complete description of this procedure.
Start Date field	The date the service representative will begin working on the task.

Read-only Information	Description
Contract field	The name of the customer contract. Tap this field to view additional contract information. See "Viewing Contract Information" on page 3-27 for a complete description of this procedure.
Type drop-down list	The type of task.
Priority drop-down list	The priority in which the task is to be completed.
Esc	If a task is escalated on the enterprise system, then "Esc" appears in the upper right corner of the of the Task screen, across from the screen title.

Search for the Desired Task:

- From the Task List screen, choose **Search Tasks** from the Goto menu.

  The Search Tasks screen opens.

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

  The Search Results screen opens.

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

Search Result

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

Done   Search
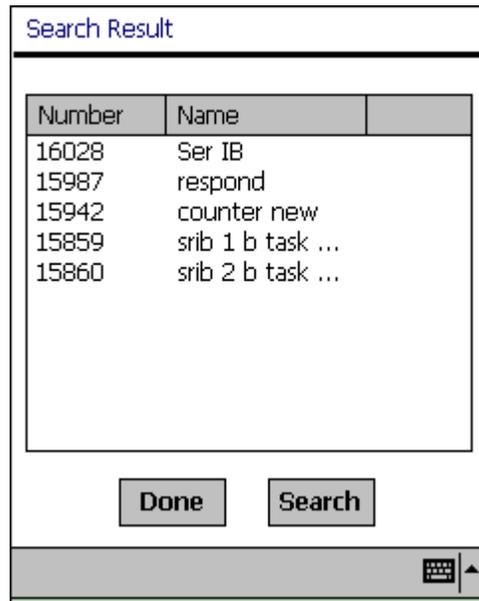
- Select the desired task.

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

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

   See "Creating and Viewing a Note" on page 3-35 for a complete description of this procedure.

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

   - Accepted—specify when you are ready to begin work on the task

   - Cancelled—specify when if the assigned task is not necessary

   - Closed—specify when the work for the task is finished

   - Completed—specify when the work for the task is finished

   - Interrupted—specify when a task is on hold

- Rejected—specify if the assigned task is not applicable to the current situation

- Working—specify when a task is in progress

4. 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.

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

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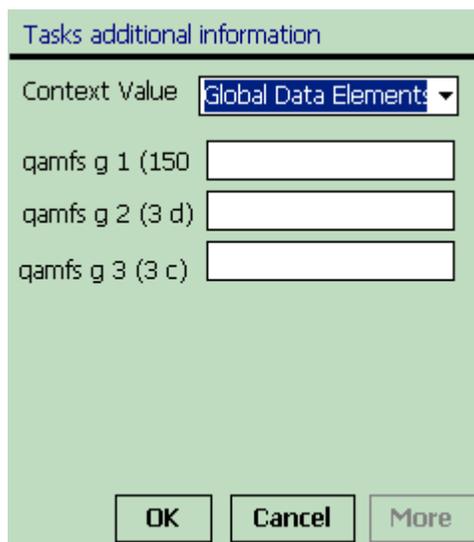
This graphic is a typical view of the Task Additional Information screen. In this example, Context Value drop-down list, qamfs g 1 (150), qamfs g 2 (3 d), qamfs g 3 (3 c) are the task flexfields.

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

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

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

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

The Debrief screen opens. From this screen, you can enter information for the labor, material, and expense reports. See "Debrief Reporting" on page 3-40 for a complete description of this procedure.

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

The SR screen opens. In this screen, you can view and change service request details, including the problem and resolution. See "Viewing and Changing Service Request Information" on page 3-21 for a complete description of this procedure.

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

The Counters screen opens. In this screen, you can set and reset counter reading. See "Creating a New Counter Reading" on page 3-69 and "Resetting a Counter Reading" on page 3-71 for a complete description of these procedures.

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

See "Viewing Parts Requirement Status" on page 3-75 for a complete description of this procedure.

12. To specify a part for a task, choose **Create Parts Requirement** from the Goto menu.

See "Creating a Parts Requirement" on page 3-73 for a complete description of this procedure.

3.5.2 Viewing a Task Attachment

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

1. Navigate to the Task screen.

See "Viewing and Changing Task Information" on page 3-11 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.
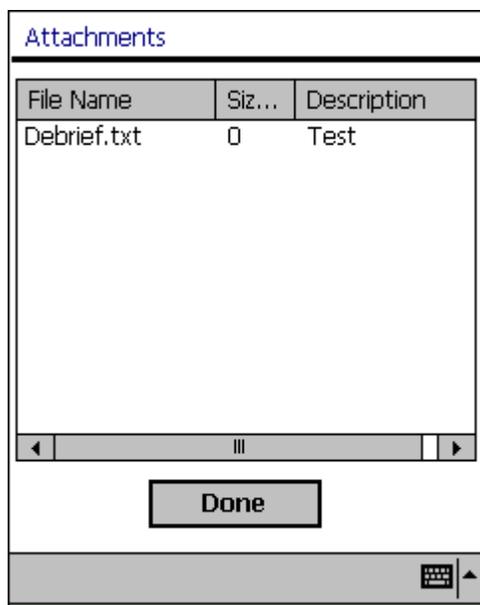
3. Tap the file that you want to open.

The selected file opens.

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

3.5.3 Creating a Task

Steps

Complete the following steps to create a task:

1. Navigate to the SR screen.

See "Viewing and Changing Service Request Information" on page 3-21 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 select the type of time units.

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

   See "Using the Date Drop-down List" on page 3-8 for a complete description of this procedure.

10. To change the task 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" on page 3-8 for a complete description of this procedure.

12. To change the task 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" on page 3-21 for a complete description of the SR screen.

3.5.4 Creating a Personal Task

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

Steps

To create a personal task, complete the following steps:

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

Create Task

Name	
Description	
Status	Assigned ▼
Type	▼
Priority	▼
Planned Effort	▼
Start	06/07/2004 ▼ 3 ▼ : 20 ▼
End	06/07/2004 ▼ 4 ▼ : 20 ▼

OK   Cancel

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

See "Creating a Task" on page 3-17 for a complete description of this procedure.

3.6 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 field service representative. You can view the summary details of a service request in the Task List screen. See "Understanding the Task List Screen" on page 3-6 for a complete description of this procedure.

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

3.6.1 Viewing and Changing Service Request Information

Prerequisites

- Opening a task from the Task List screen. See "Working with Your Task List" on page 3-6.

Steps

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" on page 3-11 for a complete description of this screen.

2. Tap **SR**.

   The SR screen opens.

3. Tap the Intake Date field.

    The incident, service request, respond by, and resolve by times appear. These times are determined at the home office and 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 open the Customer screen to view additional customer information. See "Viewing Customer Information" on page 3-79 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" on page 3-84 for a complete description of this procedure.
Intake Date field	The date that the service request was created.
Summary field	A brief description of the customer problem.
Contract field	The name of the customer contract. Tap this field to view additional contract information. See "Viewing Contract Information" on page 3-27 for a complete description of this procedure.
Status drop-down list	The current status of the service request.

Read-only Information	Description
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" on page 3-85 for a complete description of this procedure.

5. To add or change customer purchase order information, enter new information in the Cust 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" on page 3-35 for a complete description of this procedure.

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

   The Service Request screen opens.

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

> **Note:** Service request 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.

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

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

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

    The All Tasks for SR screen opens. In this screen, you can view all the tasks for the service request. See "Viewing All Tasks for a Service Request" on page 3-28 for a complete description of this procedure.

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

    The Create Task screen opens. As the screen name implies, this is where you can create a task. See "Creating a Task" on page 3-17 for a complete description of this procedure.

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

The SR History screen opens. As the screen name implies, this is where you view the service request history. See "Viewing Service Request History" on page 3-29 for a complete description of this procedure.

3.6.2 Viewing a Service Request Attachment

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

1. Navigate to the SR screen.

See "Viewing and Changing Service Request Information" on page 3-21 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.
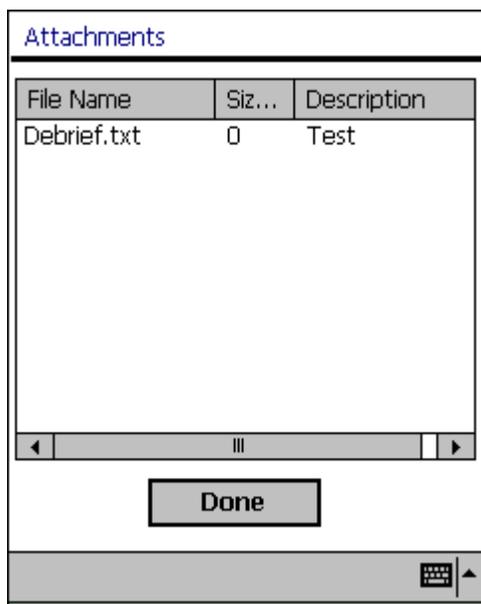
3. Tap the file that you want to open.

The selected file opens.

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

3.6.3 Viewing Contract Information

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

■ Customer entitlements

■ Service coverage

Steps

Complete the following steps to view contract information:

1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information" on page 3-21 for a complete description of this procedure.

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

   The Contract screen opens.

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

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" on page 3-35 for a complete description of this procedure.

3.6.4 Viewing All Tasks for a Service Request

Steps

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" on page 3-21 for a complete description of this procedure.

2. Tap **All Tasks**.

   The All Task for SR screen opens.

All Tasks for SR:15000

Day	Number	Name
NOV-08	16327	srib 2 b task ...

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 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" on page 3-11 for a complete description of this screen.

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

3.6.5 Viewing Service Request History

To best service the customer, the field service representative should review the customer's service history prior to making a customer visit. Oracle Mobile Field Service/Pocket PC can provide you with service history for either a customer or a customer product. Only tasks and service requests that are closed or completed can 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 will be used to create the service history. For example, the last three service requests may be compiled to create the service history.

Steps

Complete the following steps to view service request history:

1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information" on page 3-21 for a complete description of this procedure.

2. Tap **SR History**.

   The SR History screen opens.

   SR 15000 : History

SR Number:	14300 ▼
Summary:	srib 1 b lap - sh 1
Intake Date:	2003-10-01 19:24:42
Type:	qamfs sr
Severity:	Medi
Problem:	QAMFS PC1
Resolution:	QAMFS RC1
Product:	82268

   Tasks:

15888	srib 1 b task 1 b lap

   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 of the service request
Problem	The problem to be fixed
Resolution	The state of the service request resolution

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

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

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

   The Task Debrief screen opens, displaying read-only debrief information about the selected task. For additional details about this screen and how to view reports, see "Debrief Reporting" on page 3-40.

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

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

3.6.6 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)

Steps

Complete the following steps to create a service request:

1. Navigate to the Customer screen.

   See "Viewing Customer Information" on page 3-79 for a complete description of this procedure.

2. Tap **Create SR**.

   The Create SR screen opens.

3. In the Summary field, briefly describe the service request.

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.

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

   The Items screen opens with items and their descriptions listed in a table.
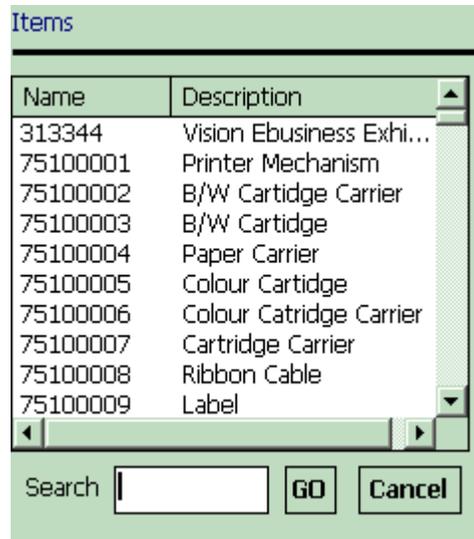
5. Tap the desired item.

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

   Optionally, you can specify 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 Items screen opens with instances, items, and their descriptions listed in a table.
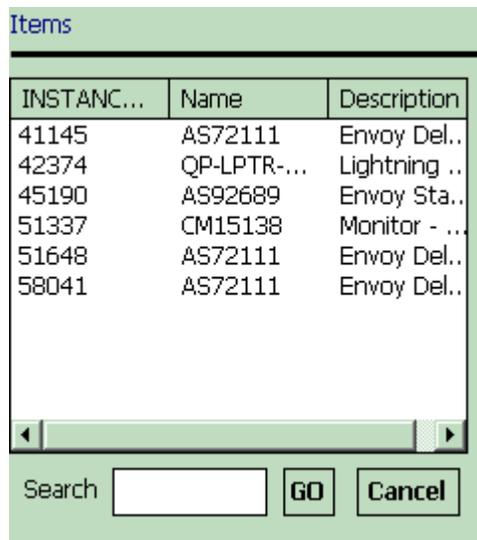
7. Tap the desired item.

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

   Optionally, you can specify 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" on page 3-79 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 begin over.

3.7 Creating and Viewing a Note

You can create notes for various reasons. For example, you may 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 all 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" on page 3-21 for a complete description of this procedure.

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

  See "Viewing and Changing Task Information" on page 3-11 for a complete description of this procedure.

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

  See "Viewing Customer Product Information" on page 3-84 for a complete description of this procedure.

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

  See "Viewing Customer Product Information" on page 3-84 for a complete description of this procedure.

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

  See "Viewing Contract Information" on page 3-27 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, or Product Notes screen opens.

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 the 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, or Product Notes screen, depending on the kind of note that you are creating.
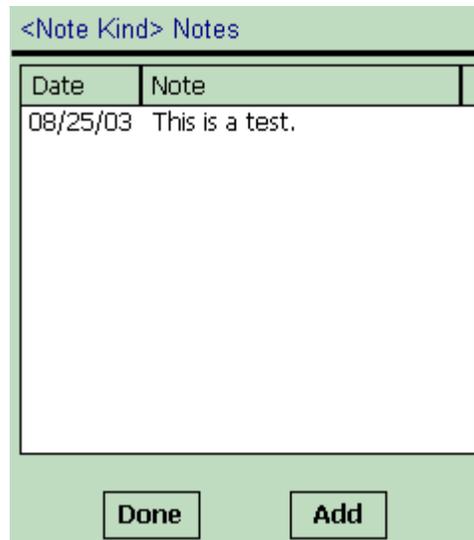
9. To add another note, tap **Add**.

   Depending on the kind of note that you are creating, either the SR Note, Task Note, Customer Note, or Product 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.
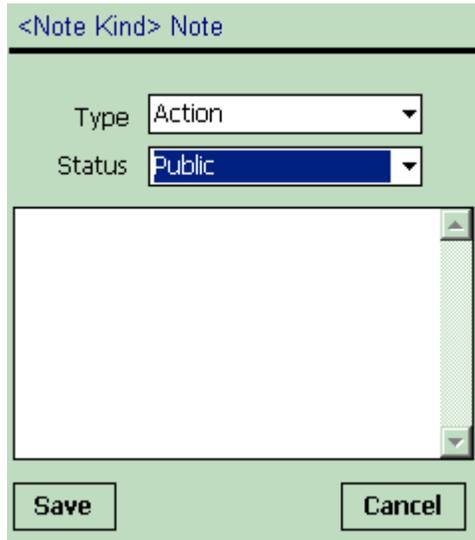
10. If you are not satisfied with the default note type, then make the appropriate selection from the Type drop-down list.

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, or Product Notes screen, depending on the kind of note that you are creating.

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

Tap **Add** to add another note.

3.8 Debrief Reporting

The Debrief screen is where you do 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 what materials were involved in the completion of a task. This includes both replacement and recovered parts. This information is used by the home office to replenish part inventories.

- Expenses   Describes the expenses required to complete a task.

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

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

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

3.8.1 Creating a Labor Report Item

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

Steps

Complete the following steps to create a labor report:

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

   The Task screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-40 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 in the Service Date drop-down list and the Start Time drop-down lists, respectively. The End Time drop-down list also contains a default value—the start time value plus one hour.

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

Task 14570 : Labor Line

Activity	[ ] [...]
Item	[▼]
Service Date	8 / 5 /03 ▼
Start Time	18 ▼ : 30 ▼
End Time	19 ▼ : 30 ▼
Duration	[ ]
UOM	[▼]
Justification	[▼]

[OK] [Cancel] [Delete]

4. Tap the **Activity** ellipse (...) button to specify the labor activity.

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

Select Activity

Activity	Process
CSF_ORDER	Field Service
Labor Transaction	Field Service
qamfs lab order ib	qamfs field se...
qamfs lab order noib	qamfs field se...

[Cancel]

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.

In the following steps, specify 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" on page 3-8 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 for 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 for the 24-hour clock format.

10. In the Duration field, specify 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 value in the Duration field.

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 are listed here.

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

Task 16327 : Debrief

Labor		Add	Show All
qamfslab1	1		HR
	20:40	21:40	

| Materials | Use | Return | Show All |
| qamfsmat1invca1s... | 1 | Ea | |

| Expenses | | Add | Show All |
| qamfsexp1 | 1 | | CAD |

Problem [▼]
Resolution [qamfs rc1 ▼]

[Credit]   [Sign]

🏠 📋 | 🗐 | 🖃 ✓

3.8.2 Deleting a Labor Report Item

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

Prerequisite

■ Creating a labor report item. See "Creating a Labor Report Item" on page 3-41.

Steps

Complete the following steps to delete a labor report item:

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

   See "Creating a Labor Report Item" on page 3-41 for a complete description of this procedure.

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

   The Labor Line screen opens.

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

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

Task 14570 : Labor Line

Activity	CSF_ORDER
Item	Labor 1
Service Date	8 / 5 /03
Start Time	18 : 45
End Time	19 : 45
Duration	
UOM	
Justification	Labor - Recall

OK **Cancel** **Delete**

4. Tap **Delete**.

5. Oracle Mobile Field Service/Pocket PC returns you to the Labor window where the desired labor report item is no longer present.

3.8.3 Creating a Material Report Item

After you complete a task, you can record what materials 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 an 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 representatives are assigned to a task, then multiple material reports for a task can be created. You can also add several material report items to a material report. For each material report item, a separate line is created in the report. Oracle Mobile Field Service/Pocket PC enables you to add material report items regardless of the task status.

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

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

Steps

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" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-40 for a description of this screen.

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

   The first material item appears in the Material Line screen. The subinventory 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, then choose an activity code.

4. Click **Yes** 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 **No** to close the screen without saving the material item.

   Click **Return** to return to the Debrief screen.

   Click **Other** to do other debriefing.

3.8.3.2 Creating a Regular Material Report Item

Steps

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" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-40 for a description of this screen.

3. Tap **Use** 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 Line screen has various drop-down lists where you describe the material report item.

4. Tap the **Activity Code** ellipse (...) button to specify the material activity.

The Select Activity screen opens with activities and processes listed in a table.
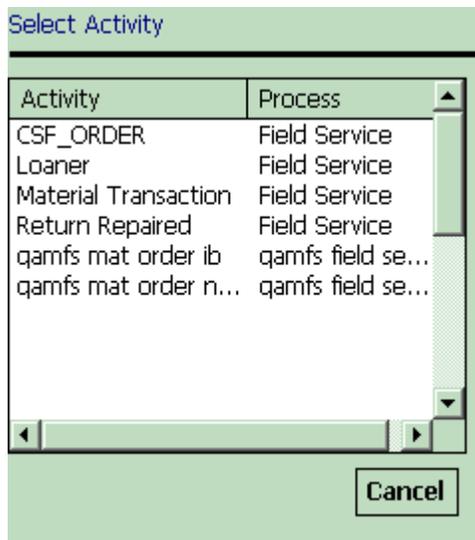
5. Select a material activity.

    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 means:

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

    ■   Tap **Find**.

        The Find Material screen opens with material names and description listed in a table.

```
Find Material

 Name          Description
 qamfsmat1i... qamfs_mat1_invca1_s...
 qamfsmat2i... qamfs_mat2_invca1_s...
 qamfsmat3i... qamfs_mat3_invca1_s...
 qamfsmat4i... qamfs_mat4_invca1_s...




 ◄                              ►

 Search  [                ]     Go

                               Cancel
```

– Select the desired material report item.

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

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

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

8. Specify in the Quantity field the number items needed.

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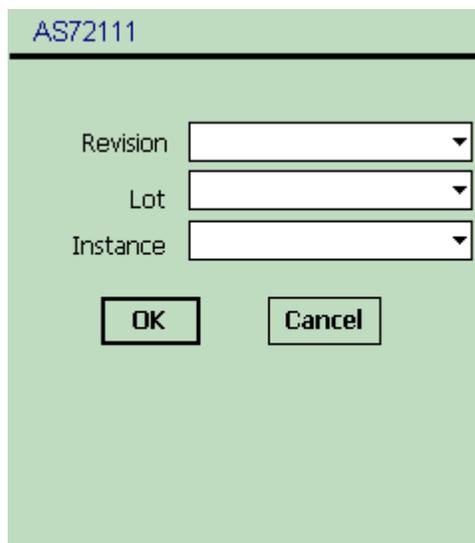
10. To change the default unit of measure, make the appropriate selection from the UOM drop-down list.

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" on page 3-8 for a complete description of this procedure.

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

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

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.

3.8.3.3 Creating a Material Report Item for a Return

Steps
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" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-40 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 latter of these contains the current date.

   Task 16327 : Material

Activity Code	[ ] [...]
Item	[ ] [...]
Instance	[ ] [...]
Sub Inventory	qamfs_sub1 ▼
Item Details	
Quantity	[1] [▼]
Return Reason	Accounts Receivables E ▼
Justification	Material - Broken ▼
Service Date	☑ 11/18/03 ▼

   [OK]   [Cancel]   [Delete]

4. Tap the **Activity Code** ellipse (...) button to specify the material activity.

   The Select Activity screen opens with activities and processes listed in a table.
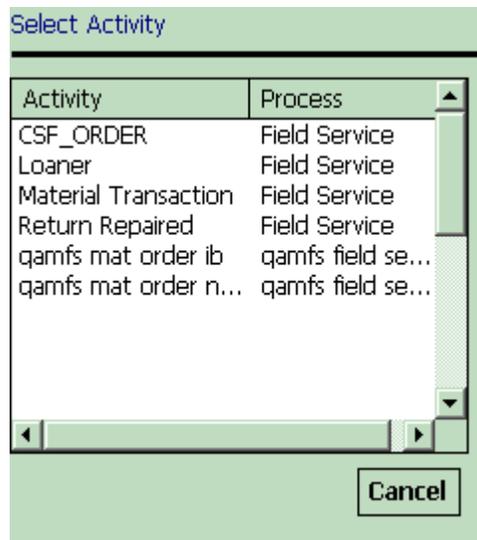
5. Select a material activity.

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

6. Tap **Item** ellipse (...) button to select a material report item.

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

7. Select the desired material report item.

   If there are several material report items listed in the Item screen, you can access the desired material report item directly by specifying information in the Item field or Serial Num field. Then click **Go**.

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

Task 16327 : Material

Activity Code	Field Service Return ...
Item	qamfsmat5inb1ins3 ...
Instance	82268 ...
Sub Inventory	qamfs_sub1 ▼
Item Details	qamfs_mat5_inb1_ins3
Quantity	1 Each ▼
Return Reason	Accounts Receivables E ▼
Justification	Material - Broken ▼
Service Date	✓ 11/18/03 ▼

OK   Cancel   Delete

8. To change the default instance value, tap the **Instance** ellipse (...) button.

The Instance screen opens.

Instance

Name	Descripti...	Instance
qamfsma...	qamfs_...	82268

Instance [   ]   Go

Serial Nun [   ]   Cancel

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 the desired instance directly by specifying information in the Instance field or Serial Num field. 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.
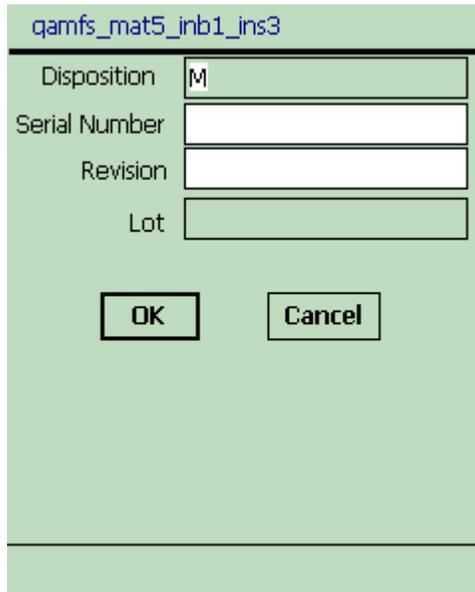
11. In the Serial Number field and Revision field, specify the appropriate information and then tap **OK**.

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

    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 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.

3.8.4 Deleting a Material Report Item

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

Prerequisite

- Creating a material report item. See "Creating a Material Report Item" on page 3-45.

Steps

Complete the following steps to delete a material report item:

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

   See "Creating a Material Report Item" on page 3-45 for a complete description of of this procedure.

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

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

If Oracle Mobile Field Service/Pocket PC is synchronized after the creation of the desired material report item, then the **Delete** button is disabled in the Material Line screen or Material screen.

3. Tap **Delete**.

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

3.8.5 Creating an Expense Report Item

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

Steps

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" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-40 for a description of this screen.

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

   The Expense Line window opens with current date in the Service Date field.

Task 16327 : Expense Line

Activity	[ ] [...]
Item	[▼]
Amount	[ ]
Currency	US dollar ▼
Quantity	[ ]
UOM	[▼]
Service Date	11/18/03 ▼
Justification	[▼]

[OK] [Cancel]

4. Tap the **Activity** ellipse (...) button.

   The Select Activity screen opens with expense activities and processes listed 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/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 this selection.

In the following steps, specify 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, specify the amount of money that was needed to complete the task.

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

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

10. From the UOM drop-down list, select the currency 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 state of the expense report item.

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

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.

3.8.6 Deleting an Expense Report Item

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

Prerequisite

- Creating an expense report item. See "Creating an Expense Report Item" on page 3-58.

Steps

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" on page 3-45 for a complete description of of this procedure.

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

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

```
Task 16327 : Expense Line

   Activity  | Expense Transactio | ... |
      Item   | Expense           ▼ |
    Amount   |                     |
  Currency   | US dollar         ▼ |
  Quantity   | 12.000000          |
      UOM    | Dollars           ▼ |
Service Date | 11/18/03          ▼ |
Justification| Expense - Fix     ▼ |

  [ OK ]      [ Cancel ]    [ Delete ]
```

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

3. Tap **Delete**.

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

3.9 Obtaining an Electronic Signature

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

Steps

Complete the following steps to obtain an electronic signature:

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

   The Task screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-40 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.

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

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

5. In the Name field, enter the customer name.

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" on page 3-8 for a complete description of this procedure.

7. Tap **OK**.

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

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

3.10 Credit Card Information

Giving the customer the ability to pay by credit card is a convenience for both the customer and the service organization. Oracle Mobile Field Service/Pocket PC enables you to record or update the following credit card information:

- Credit card number

- Expiration date

- Credit card type

- Customer name

With this information saved, you do not have to re-enter it. The credit card information is encrypted so it is secure. Only the last four digits of the credit card number is visible in the application.

When you synchronize with the enterprise system, the credit card information is validated.

> **Note:** The credit card feature is set in a profile. Consult your field service administrator on the use of this feature.

3.10.1 Recording Credit Card Information

Steps

Complete the following steps to record or update credit card information:

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

    The Task screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

    The Debrief screen opens. See "Debrief Reporting" on page 3-40 for a description of this screen.

3. Tap **Credit**.

    The Credit Card screen opens with an expiration date in the Exp Date drop-down lists.

4. Complete the First Name, Middle Name, and Last Name fields with the appropriate customer information.

5. If you are note satisfied with the default credit card type, then make the appropriate selection from the Type drop-down list.

6. In the Number field, enter the customer's credit card number.

   Oracle Mobile Field Service/Pocket PC encrypts the customer credit card information. This is indicated with all but the last four credit card digits X'ed out in the Number field.

7. If you are note satisfied with the default expiration date, then make the appropriate selection from the Exp Date drop-down lists.

8. Tap **OK**.

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

   Tap **Cancel** to return to the Debrief screen without saving any credit card information.

3.10.2 Deleting Credit Card Information

For credit card information that has not been synchronized, Oracle Mobile Field Service/Pocket PC enables you to delete this information for a task.

Prerequisite

■ Unsynchronized credit card information has been created for a task. See "Recording Credit Card Information" on page 3-65.

Steps

Complete the following steps to delete credit card information:

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

   The Task screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

2. Tap **Debrief**.

   The Debrief screen opens. See "Debrief Reporting" on page 3-40 for a description of this screen.

3. Tap **Credit**.

   The Credit Card screen opens with information describing the customer's credit card. To ensure security, all but the last four digits of the card are X'ed out in the Number field.

4. Tap **Delete**.

Oracle Mobile Field Service/Pocket PC clears all the fields of the Credit Card screen, except the Type drop-down list and the Exp Date drop-down lists.

3.11 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 reset a reading as well as make miscellaneous readings.

A counter reading consists of the following:

- Name

- Time stamp

- Value

- Unit of measure

3.11.1 Creating a New Counter Reading

Steps

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" on page 3-11 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.

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 and **Reset** button become enabled.

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

   The counter reading appears in the table.

   For a description of the reset counter procedure, see "Resetting a Counter Reading" on page 3-71.

   Note: Depending how your counter is defined, you may have to enter a reading that is either less than or greater than the last counter reading. Or your counter may be defined with no restrictions.

3.11.2 Resetting a Counter Reading

Steps

Complete the following steps to reset a counter reading:

1. Navigate to the Counters screen.

   See "Creating a New Counter Reading" on page 3-69.

2. Select the desired counter reading from the table.

   The selected counter reading appears in the Reading field.

3. Tap **Reset**.

   The Reset Counter window opens.
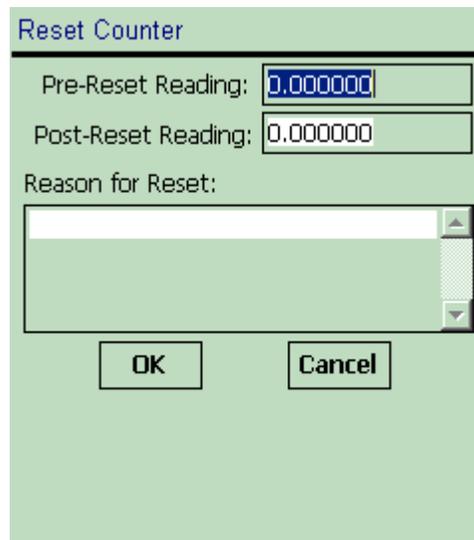
4. In the Pre-Reset Reading field, enter the original counter reading.

5. In the Post-Reset Reading field, enter a value to reset the counter reading.

6. Optionally, enter in the Reason for Reset field a statement describing your reason for resetting the counter.

> **Note:** Depending how your counter is defined, you may have to enter a counter reading that is either less than or greater than the last counter reading. Or your counter may be defined with no restrictions.

7. Tap **OK**.

   Oracle Mobile Field Service/Pocket PC returns you to the Counters screen where the new counter reading appears in the table.

3.12 Spare Parts Management

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

3.12.1 Creating a Parts Requirement

Steps

Complete the following steps to order a part:

1. From the Task List screen, tap the parts icon.
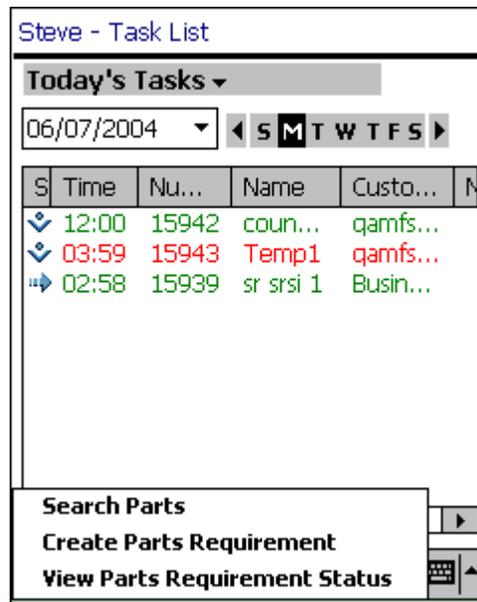
2. From the Goto menu, select **Create Parts Requirement**.

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

3. Tap the **Item** ellipse (...) button.

The Parts Search window opens.

4. Select the desired part from the table.

If you know enough information about the desired part, you can specify this in the Part Number field or Description field and then make your selection from the table.

The selected part appears in the New Order screen.

5. Tap **Order**.

   A message appears stating the requirement number and prompting you to continue. Remember this part number in order to reference the part order status.

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

   The selected part is added to the part order. Oracle Mobile Field Service/Pocket PC enables you to check the status of this order. See "Viewing Parts Requirement Status" on page 3-75 for a complete description of this procedure.

3.12.2 Viewing Parts Requirement Status

After a parts requirement has been created, you can view parts requirement status.

Steps

Complete the following steps to view a parts requirement status:

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

   The View Order screen opens.

View Order	10139 ▼
Task Number	16327
Item	smat1invca1sub1noins
Description	qamfs_mat1_invca1_s
Quantity	1
UOM	Each
Need By	☐ 11/13/03 ▼
Status	Open
Arrival Date	☐ 11/13/03 ▼
Sub Inv	qamfs_sub1
Shipping Add	393,Foster City,CA =

2. To change the requirement number, make the proper 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.

3.12.3 Viewing On-hand Parts and Quantities

Steps

Complete the following steps to order a part:

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

   The Search Onhand Qty screen opens.

Search Onhand Qty

Sub Inventory	Stores
Locator	
Item	
Description	
Revision	
Lot From	
Lot To	

OK   Cancel

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

The Onhand Quantity screen opens with the desired part displayed.

Su...	Item	D...	UOM	QTY
Sto...	75100001	Pri...	Ea	-1
Sto...	MEL-LOC-1	Lo...	Ea	0
Sto...	qamfsm...	qa...	Ea	1000
Sto...	qamfsm...	qa...	Ea	2

Details

Locator	Revision	Lot N...	QTY	
	A	L002	0	

Done   **Search**

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

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

3.13 Viewing Customer Information

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

- Name

- Contact

- Address

- Phone number

There are two ways 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:

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

  The Task screen opens. See "Viewing and Changing Task Information" on page 3-11 for a complete description of this screen.

- Tap the Customer field.

  The Customer screen opens with the customer name 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:

- 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

PARTY_N...	ADDRESS1	
Costco Wh...	PO Box 3...	
qamfs_cust1	qamfs_cu...	

Search [   ] Go

Cancel

- Tap the desired customer.

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

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

The Party Information screen opens.

This graphic 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:** Customer flexfields are determined at the enterprise server level and cannot be changed or created in the field. This includes whether a field is read-only or not.

3. Tap **OK**.

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

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

   Tap **Cancel** to return to the Customer screen without saving any data entry.

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" on page 3-35 for a complete description of this procedure.

5. To view all customer products, tap **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" on page 3-84 for a complete description of this procedure.

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

   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" on page 3-28 for a complete description of this procedure.

7. To create a service request, tap **Create SR**.

   The Create SR screen opens. In this screen, you create a service request by specifying various information. See "Creating a Service Request" on page 3-31 for a complete description of this procedure.

3.14 Viewing Customer Product Information

Oracle Mobile Field Service/Pocket PC enables you to view the customer product for a task or all the products for a customer. The customer product details are described 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.
Description	Describes the customer product.
Number	The customer product number, generated by Oracle Mobile Field Service/Pocket PC.
Serial Number	The serial number of the customer product.
Install Date drop down list	The date the customer product was installed.

Read-only Fields	Description *(Cont.)*
Revision	

3.14.1 Viewing and Changing a Customer Product for a Task

Steps

Complete the following steps to view customer product information:

1. Navigate to the SR screen.

   See "Viewing and Changing Service Request Information" on page 3-21 for a complete description of this procedure.

2. Tap the Product 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 ellipse (...) button near the Product field.

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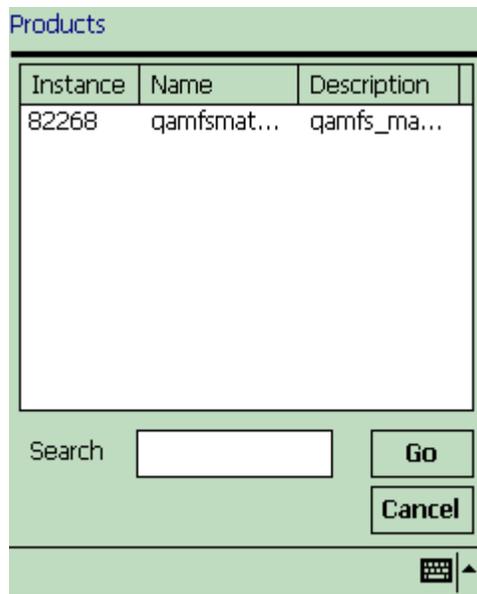
5. Tap the desired customer product.

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

3.14.2 Viewing All Products for a Customer

Steps

Complete the following steps to view customer product information:

1. Navigate to the Customer screen.

   See "Viewing Customer Information" on page 3-79 for a complete description of this procedure.

2. Tap **Products**.

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

All Products : Business World

Search [   ]   [GO]

Instance	Name	Description
41145	AS72111	Envoy Delux...
51648	AS72111	Envoy Delux...
58041	AS72111	Envoy Delux...
45190	AS92689	Envoy Stan...
51337	CM15138	Monitor - 17"
42374	QP-LPT...	Lightning La...

[Done]

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.

3.15 Messaging

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

3.15.1 Messaging Functionality

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

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

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

After you synchronize, you can see any new messages in the Mail screen (inbox view). You can make sure that a message you wrote has been sent by seeing if it is listed in the Mail screen (outbox view).

3.15.2 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

Steps

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** ellipse (...) button 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

USER N...	FULL NAME
IWILSON	Wilson, Isaac
QAMFSL...	Qamfslap_001, Steve
QAMFSL...	Qamfslap_002, Steve
QAMFSP...	Qamfspal_001, Steve
QAMFSP...	Qamfspal_002, Steve
SWESO...	Wesolinski, Steve

Search [   ]   Go
                       Cancel
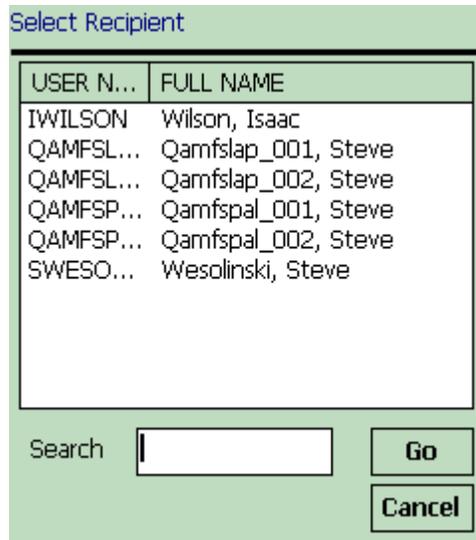
6. Select the recipient from the table.

   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.

3.16 Synchronizing with the Enterprise System

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

Steps

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

1. Establish a network connection for your Pocket PC.

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

   The synchronization screen opens.

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.

Field	Description
Server	IPaddress:port

Check box	Description
Change	Leave un-selected.
Save password	Select this check box to save the mSync user name and password.
Secure	
Use Proxy	Select if appropriate.
Force Refresh	

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.

3.17 Closing the Application

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

Prerequisites

Save all data and be ready to exit the application.

Steps

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

- In the lower portion of the Task List screen, choose Exit from the Exit drop-down list.

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

Part II

Oracle Mobile Field Service/Laptop

This part contains the following chapters that describes the installation and usage of Oracle Mobile Field Service/Laptop:

- Chapter 4, "Installing Oracle Mobile Field Service/Laptop"
- Chapter 5, "Using Oracle Mobile Field Service/Laptop"

4

Installing Oracle Mobile Field Service/Laptop

This chapter describes what is needed to install and use the Oracle Mobile Field Service/Laptop application. It also describes how to launch the application.

4.1 Minimum Hardware Requirements

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

- Computer: IBM-compatible with Pentium III processor

- Disk space: 1 GB

- Monitor: 256 color display

- RAM: 128 MB

- Other requirements: serial port, internet connection, mouse or pointer device

4.2 Minimum Software Requirements

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

- Operating System: Windows NT 4.0 (Service Pack 5), Windows 98, Windows 2000, Windows ME, or Windows XP

- Browser: Microsoft Internet Explorer, version 5.5 or later. This is the recommended browser for all Oracle HTML-based applications.

4.3 Installing the Software

This section describes how to install the Web-to-Go server and Oracle9*i* Lite database, in addition to the Oracle Mobile Field Service/Laptop application. This additional software is necessary for Oracle Mobile Field Service/Laptop to operate.

Steps

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

1. Open a Web browser window.

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

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

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

3. Click the link to download the Mobile Client for Laptop setup program and save it.

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

4. From Windows Explorer, double-click the `setup.exe` file that you just downloaded.

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

5. Choose an install directory.

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

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

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

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

7. Click **Go**.

The Oracle9*i* Lite Client Initialization page opens.
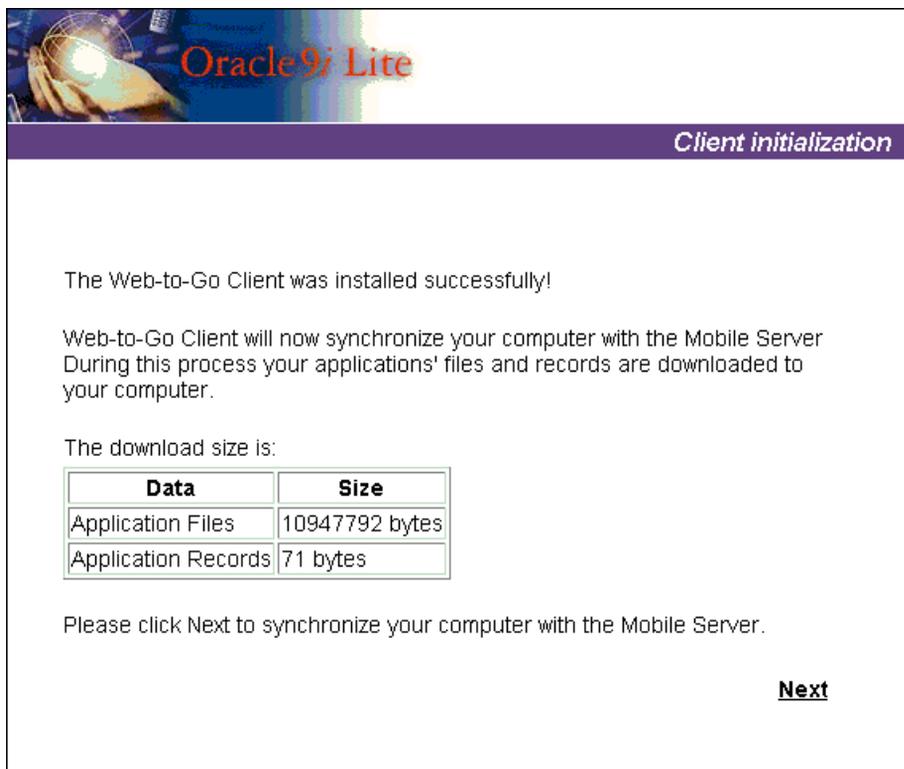
8. Click **Next**.

The Oracle9*i* Lite Client Synchronization page opens. The initial synchronization downloads the application and your initial set of data. The synchronization takes several minutes; therefore, do not exit the browser until the synchronization is complete.

After synchronization completes, the browser displays the Oracle Mobile Field Service/Laptop Calendar page (Daily View).

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

5

Using Oracle Mobile Field Service/Laptop

This chapter describes how to use all the functionality associated with the following pages:

- Calendar

- Information

- Messaging

- Home

5.1 Application Overview

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

- 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 field service representatives may start and end their work day:

1. Launch Oracle Mobile Field Service/Laptop.

   See "Launching Oracle Mobile Field Service/Laptop" on page 5-3.

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

   See "Synchronizing with the Enterprise System" on page 5-100.

3. Review your calendar for the day and then set the status of the task on which you will be working.

   See "Viewing and Opening Tasks" on page 5-8.

4. Create a personal task if you need to communicate any unavailability.

   See "Creating a Personal Task" on page 5-25.

5. Record the time before visiting the customer site.

   See "Creating and Deleting a Time Report Item" on page 5-57.

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

   See "Viewing and Opening Tasks" on page 5-8 and "Viewing and Changing Task Information" on page 5-47.

7. Review customer information.

   See "Viewing Customer Information" on page 5-26

   - Review contract information.

     See "Viewing Contractual Information" on page 5-41.

   - Review service history information.

     See "Viewing Service History" on page 5-45.

   - Create or update a customer note if necessary.

     See "Creating and Viewing Notes" on page 5-53.

8. Update or enter any service request information.

   See "Viewing and Changing Service Request Information" on page 5-34.

9. Set any counter and counter properties.

   See Setting Counters and Counter Properties on page 5-80.

10. Order or transfer any necessary parts needed to finish the task.

    See Spares Management on page 5-84.

11. Record the time prior to leaving the customer site.

    See "Creating and Deleting a Time Report Item" on page 5-57.

12. Record any materials used to complete the task.

    See "Creating and Deleting a Material Report Item" on page 5-60.

13. Record expenses incurred while completing the task.

See "Creating and Deleting an Expense Report Item" on page 5-69.

14. Repeat these steps for each task that you complete.

15. Finally, exit out of Oracle Mobile Field Service/Laptop.

See "Logging Out" on page 5-103.

5.2 Launching Oracle Mobile Field Service/Laptop

Complete the following steps to start Oracle Mobile Field Service/Laptop:

1. Choose `Start > Programs > Oracle9i Lite > Web-to-Go`

The Web-to-Go icon appears in the system tray. The system tray is located in the Windows taskbar, 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 on the Web-to-Go icon in the system tray.

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

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

The Calendar page (Daily View) opens. For a complete description of this page, see "Using the Calendar Page" on page 5-6.

In order 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 make, such as creating debrief lines and updating task statuses, you need to synchronize with the enterprise system.

4. Establish a telephone / internet connection for your laptop computer.

5. Click the **Synchronize** button in the upper right corner of the page.

The information on your laptop computer is synchronized with the enterprise system. Synchronizing your data can take a few minutes; therefore, do not abort this process. If the synchronization process fails, contact your system administrator.

5.3 Using the Calendar Page

The Calendar tab is used to access the Calendar page, which can contain the daily, weekly, and monthly listing of tasks assigned to you. The calendar gives you an immediate overview of all the tasks that need to be done for the day or week, along with pertinent task information, such as the scheduled task start time.

The calendar defaults to the date of the oldest active task. For example, if a task from yesterday has not yet been closed or completed, Oracle Mobile Field Service/Laptop will display this task first in the Calendar page. The tasks for the current day are listed in ascending order based on the scheduled date/time, after any active tasks from previous days.

The following table describes what you can do from the Calendar page based on the page view:

Calendar Function	Daily View	Weekly View
Navigate to the details of a selected task	Yes	Limited

Calendar Function	Daily View	Weekly View
Change the status of a task	Yes	No
Select a past or future calendar of tasks	For a day	For a week
Create a personal task	Yes	No

> **Note:** As shown in the table above, you must be in the Daily View of the Calendar page in order to change the task status and create a personal task. The functionality in the Weekly View is an abbreviation of that of the Daily View.

5.3.1 Viewing and Opening Tasks

The Calendar page is your starting point for each day of work. From it, you can learn which customers you are scheduled to visit, what tasks you will perform at each site, and retrieve any additional information about the listed tasks.

Steps

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

1. Click the Calendar tab to open the Calendar page.

   The Daily View is the default view of the Calendar page.

   The Daily View of the Calendar page contains a table of tasks for the day. This table has multiple columns where you can access various task information.

   The Weekly View of the Calendar page contains a table of tasks for the week. This table contains columns for each day of the week. A task appears in the column of the day for which it is assigned.

   To open the Weekly View, click **Weekly View** in the Calendar tab.

2. Open the task either in the Daily View or Weekly View.

   To Open the Task from the Daily View:

   - From the Calendar: Daily View table, open the task by clicking one of the following:

- Request column—Click the desired service request number to view the service request details.

  The Information page (Service Request Details view) opens. See "Viewing and Changing Service Request Information" on page 5-34 for a complete description of this page.

- Customer column—Click the desired customer name to view more information about the customer, such as the name and address of the customer.

  The Information page (Customer Details view) opens. See "Viewing Customer Information" on page 5-26 for a complete description of this page.

- Task Name column—Click the desired task name to view a description of the task.

  The Information page (Task Details view) opens. See "Viewing and Changing Task Information" on page 5-47 for a complete description of this page.

- Product column—Click the desired customer product to view a description of the product.

  The Information page (Search Results view) opens. See "Ordering a Part" on page 5-85 for a complete description of this page.

The Calendar: Daily View table also provides the following information:

- Scheduled column—Where you can view the task scheduled start time

- Travel Time column—Where you can view the calculated or default travel time.

- Task Number column—Where you can view the task number for a desired task.

- Status column—Where you can view and specify the current task status. To specify the current task status, access the status drop-down list for the desired task and then make the appropriate selection.

  Set the status of the task and then click **Update** to save the status to the local database on your laptop computer. Choose a status from the following table:

Task Status	Description
Accepted	Assign this status to a task once you have viewed the calendar and are ready to work on the task.
Assigned	A task has this status when 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:

– Upon initial download to the laptop computer, a task has a status of "Assigned".

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

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

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

To Open the Task from the Weekly View:

- If you haven't done so already, click Weekly View in the Calendar tab.

  The Calendar: Weekly View table appears.

- From the Calendar: Weekly View table, open the task by clicking one of the following:

  – Task name—Click the desired task name to view a description of the task.

  The Information page (Task Details view) opens. See "Viewing and Changing Task Information" on page 5-47 for a complete description of this page.

  – Customer name—Click the desired customer name to view more information about the customer, such as the name and address of the customer.

The Information page (Customer Details view) opens. See "Viewing Customer Information" on page 5-26 for a complete description of this page.

The Calendar: Weekly View table also provides the following information:

– Scheduled start time for a task

5.3.2 Viewing a Past or Future Calendar

Oracle Mobile Field Service/Laptop enables you to view the calendar of tasks for a past or future day or week.

Steps

To view the calendar of tasks for a past or future day or week, complete the following steps:

1. Click the Calendar tab to open the Calendar page.

   The Daily View is the default view of the Calendar page.

2. To change to the Weekly View, click Weekly View in the Calendar tab.

3. To go to the next or previous calendar of tasks, click the left or right arrow button.

   ■ In the Daily View, the tasks for the next or previous day appears.

   ■ In the Weekly View, the tasks for the next or previous week appears.

4. To select a calendar day or week directly, click the calendar button near the date field in upper right portion of the Calendar page.

   The calendar window opens.

You can also type the date directly into the date field. If you type the date with the incorrect format, a warning message appears indicating this and then the date reverts back to its original value.

5. Use the month and year drop-down lists to display the desired month and year.

   Use the left and right arrow buttons in the calendar window to go to the next or previous month.

6. Click on the desired date.

   The calendar window closes and the selected date appears in the date field of Calendar page.

   To exit the calendar window without selecting a date, click **Cancel**. To exit the calendar window and clear the date field of Calendar page, click **Clear**.

7. Click **Go**.

   If you are in the Daily View, the task(s) for the selected date appears 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.

5.3.3 Using Quick Debrief

Quick Debrief is a feature found in the Calendar page that enables you to view and specify general debrief information and specific labor time, expense, and material information from a single page. See Debrief Reporting on page 5-57 to learn more about debrief reporting.

Quick Debrief enables you to access debrief information for a specific service request. See Viewing a Past or Future Calendar on page 5-11 to choose a different service request.

Steps

To access Quick Debrief, complete the following steps:

1. From the Calendar page, click the Quick Debrief page icon in the Calendar table, under the Quick Debrief heading.

   The Quick Debrief page opens.

2. From the Problem drop-down list, specify the type of service request problem.

3. From the Resolution drop-down list, specify the type of service request resolution.

4. In the SRNotes field, click **Add** to open the Notes window and to add a service request note.

   See "Creating and Viewing Notes" on page 5-53 for a complete description of this procedure.

5. In the TaskNotes field, click **Add** to open the Notes window and add a task note.

See "Creating and Viewing Notes" on page 5-53 for a complete description of this procedure.

6. For any flexfields, complete these according to your needs.

7. To add a labor time report item for a task, complete the following steps:

   ▪ To change the default business process, make the appropriate selection from the Business Process drop-down list in the Time Reporting area.

Time Reporting

	*Business Process	*Labor Type	*Labor Item	*Service Date	Start Time	End Time	Duratio
	Customer Call ▾	Return for Repair ▾	Labor Item (Labor Item) ▾	24-Oct-2003 🔲	00 ▾	00 ▾	00 ▾ 00 ▾	

	Business Process Id	Txn Billing Type Id	Description	Service Date	Start Time	End Time	Duration	Unit Of Measure Tl	Labor Reason Code
☐	Depot Repair	1EH m ret 25Jun02	Labor Item	21-Oct-2003	00:00	00:00	2	Hour	
☐	Field Service	Labor Transaction	Labor Item	21-Oct-2003	06:00	07:00	1	Hour	Labor - Recall
☐	Customer Call	Return for Repair	Labor Service	15-Oct-2003	00:00	00:25			
🔧 ☐	Depot Repair	1EH m ret 25Jun02	Labor Item	18-Sep-2002	13:40	14:40	1	Hour	

First | Previous 1 - 4 of 4 Next | Last

[Clear] [Add]   [Delete selected]

Expense Reporting

	*Business Process	*Expense Type	*Expense Item	*Service Date	Quantity	
	Customer Call ▾	Return for Repair ▾	Expense Item (Dollars) (Expense Item (Dollars)) ▾	24-Oct-2003 🔲		Dolla

	Business Process	Expense Type	Expense Item	Quantity	UOM	Cost	Currency	Justification	Service Date
☐	Customer Call	Return for Repair	Expense Item (Dollars)			10.5	US dollar		20-Oct-2003

First | Previous 1 - 1 of 1 Next | Last

[Clear] [Add]   [Delete selected]

Material Reporting

*Business Process	*Transaction Type
Depot Repair ▾	Estimate Repair ▾

Recovered part

> **Note:** The Business Process, Labor Type, and Service Date
> drop-down lists are mandatory. To specify the length of the task,
> *either* the Start Time and End Time fields are mandatory *or* the
> Duration field and UOM drop-down list are mandatory. Specify the
> length of time using one of these pairs, but not both.

- To change the default labor type, make the appropriate selection from the
  Labor Type drop-down list.

- To change the default labor item, make the appropriate selection from the
  Labor Item drop-down list.

> **Note:** The labor item is optional. If you keep the Labor Item
> drop-down list blank, then it is mandatory that you specify values
> in the Start Time and End Time fields, but nothing in the Duration
> field and UOM drop-down list.

- To change the default service date, specify the appropriate information in
  the Service Date field.

  Use the procedure, "Viewing a Past or Future Calendar" on page 5-11,
  beginning with step 4, to change the service date. The star next to the
  Service Date field indicates that this drop-down list is required.

In the following steps, specify the amount of labor time used to complete the
task. According to your business process, complete the steps for *either* the start
and end times *or* duration.

- From the Start Time hour and minutes drop-down lists, select the time you
  started a task.

  The Start Time hour drop-down list provides values for 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.

- From the End Time hour and minutes drop-down lists, select the time you
  ended a task.

  Again, the hour drop-down list provides values for the 24-hour clock
  format.

- In the Duration field, enter the length of time the task took to complete.

- From the UOM drop-down list, select the unit of time that describes the value in the Duration field.

- From the Reason drop-down list, select the reason for spending the specified labor time on the task.

- Click **Add**.

  The labor time report item is saved and added to the time report. In the table in the Time Reporting area, the new labor time report item is now listed.

  To clear the information that you specified for the labor time report item, click **Clear**. To delete a labor time report item from the report, select the check box near the desired report item and then click **Delete selected**.

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

8. To add an expense report item for a task, complete the following steps:

   - To change the default business process, make the appropriate selection from the Business Process drop-down list in the Expense Reporting area.

Time Reporting

	*Business Process	*Labor Type	*Labor Item	*Service Date	Start Time	End Time	Duratio
	Customer Call ▼	Return for Repair ▼	Labor Item (Labor Item) ▼	24-Oct-2003	🖳 00 ▼	00 ▼ 00 ▼	00 ▼

	Business Process Id	Txn Billing Type Id	Description	Service Date	Start Time	End Time	Duration	Unit Of Measure Tl	Labor Reason Code
☐	Depot Repair	1EH m ret 25Jun02	Labor Item	21-Oct-2003	00:00	00:00	2	Hour	
☐	Field Service	Labor Transaction	Labor Item	21-Oct-2003	06:00	07:00	1	Hour	Labor - Recall
☐	Customer Call	Return for Repair	Labor Service	15-Oct-2003	00:00	00:25			
✋ ☐	Depot Repair	1EH m ret 25Jun02	Labor Item	18-Sep-2002	13:40	14:40	1	Hour	

First | Previous 1 - 4 of 4 Next | Last

[Clear] [Add] [Delete selected]

Expense Reporting

	*Business Process	*Expense Type	*Expense Item	*Service Date	Quantity	
	Customer Call ▼	Return for Repair ▼	Expense Item (Dollars) (Expense Item (Dollars)) ▼	24-Oct-2003 🖳		Dolli

	Business Process	Expense Type	Expense Item	Quantity	UOM	Cost	Currency	Justification	Service Date
☐	Customer Call	Return for Repair	Expense Item (Dollars)		10.5		US dollar		20-Oct-2003

First | Previous 1 - 1 of 1 Next | Last

[Clear] [Add] [Delete selected]

Material Reporting

*Business Process	*Transaction Type
Depot Repair ▼	Estimate Repair ▼

Recovered part

Note: The Business Process, Expense Type, and Expense Item, and Service Date drop-down lists are mandatory. To specify the expense of the task, *either* the Quantity filed and UOM drop-down list are mandatory *or* the Cost field and Currency drop-down list are mandatory. Specify the expense using one of these pairs, but not both.

- To change the default business process, Customer Support, make the appropriate selection from the Business Process drop-down list.

- To change the default expense type, make the appropriate selection from the Expense Type drop-down list.

- To change the default expense item, make the appropriate selection from the Expense Item drop-down list.

- To change the default service date, specify the appropriate information in the Service Date field.

  Use the procedure, "Viewing a Past or Future Calendar" on page 5-11, beginning with step 4, to change the service date.

- Specify the cost and currency that describes the expense.

  The Quantity field and UOM drop-down list are used together while the Cost field and Currency drop-down list are paired together. In your description, complete only *one* of these field-and-drop-down list combinations.

  – Complete the Quantity field and UOM drop-down list if the pricing amount is unknown.

  – In the Cost field, enter the cost of completing the task. In the Currency drop-down list, ensure that the default currency is correct. If necessary, change it to the correct currency.

- In the Justification drop-down list, select the reason for spending the specified expense on the task.

- Click **Add**.

  The expense report item is saved to your laptop computer. In the table in the Expense Reporting area, the new expense report item is now listed.

  To clear the information that you specified for the expense report item, click **Clear**. To delete an expense report item from the report, select the check box near the desired report item and then click **Delete selected**.

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

There are two versions of the Material Reporting area of the Quick Debrief page: one for used parts and the other for recovered parts. In both versions, there are default values for the Business Process and Transaction Type drop-down lists.

9. To add a material report item for a task, complete the following steps:

- To change the default business process, make the appropriate selection from the Business Process drop-down list in the Material Reporting area.

The business process selection determines the selection in the Transaction Type drop-down list. The selection in this drop-down list determines whether fields and drop-down lists for a used or recovered part appear in the Material Reporting area of the Quick Debrief page.

- To change the default transaction type, make the appropriate selection from the Transaction Type drop-down list.

Adding a Used Part

- Click **Find** without completing any fields or drop-down lists.

  The Search Materials window opens.

- Click **Find** without completing any fields.

  The Search Materials area appears in the Search Materials window.

- Select the desired part from the Search Materials area.

  The Search Materials window closes and the selected material report item appears in the Used Part table.

- To change the default service date, specify the appropriate information in the Service Date field.

  Use the procedure, "Viewing a Past or Future Calendar" on page 5-11, beginning with step 4, to change the service date.

- To change the default quantity, specify the correct value in the Quantity field.

- To change the default unit of measure, specify the correct information in the UOM drop-down list.

- From the Reason drop-down list, select the reason for adding the specified part.

- Click **Add**.

The material report item is saved and added to the material report. In the table in the Material Reporting area, the new material report item is now listed.

To clear the information that you specified for the material report item, click **Clear**. To delete a material report item for a used part from the report, select the check box near the desired report item and then click **Delete selected**.

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

Adding a Recovered Part

- Click **Find** without completing any fields or drop-down lists.

  The Customer Products window opens.

- Select the desired service request.

  The Customer Products window displays a recovered install base part.
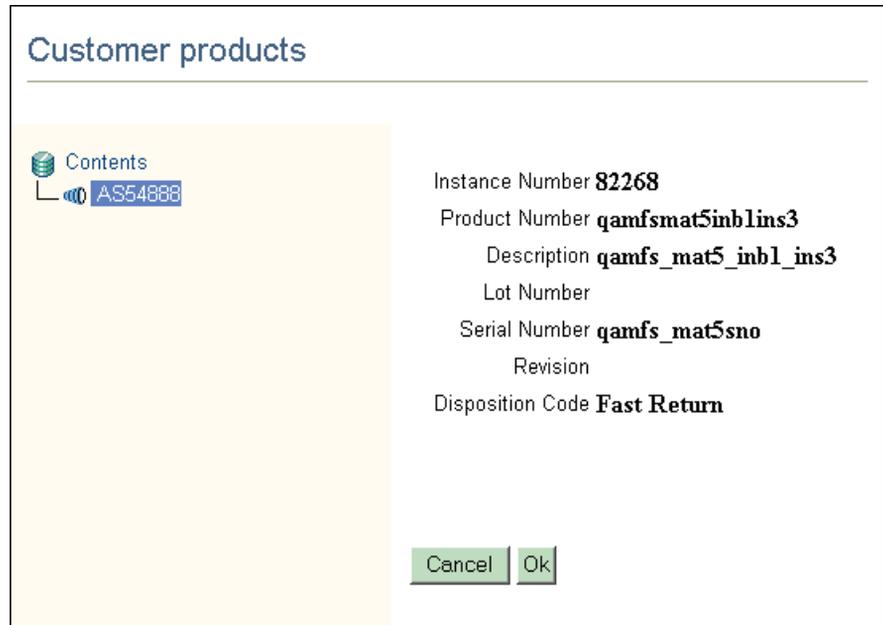
- Click **OK**.

  The Customer Products window closes and the selected material report item appears in the Recovered Part table.

- To change the default service date, specify the appropriate information in the Service Date field.

  Use the procedure, "Viewing a Past or Future Calendar" on page 5-11, beginning with step 4, to change the service date.

- To change the default quantity, specify the correct value in the Quantity field.

- To change the default unit of measure, specify the correct information in the UOM drop-down list.

- To change the default inventory, specify the correct information in the Inventory drop-down list.

- From the Reason drop-down list, select the reason for adding the specified part.

- Click **Add**.

The material report item is saved and added to the material report. In the table in the Material Reporting area, the new material report item is now listed.

To clear the information that you specified for the material report item, click **Clear**.

10. To delete a material report item for a recovered part from the report, select the check box near the desired report item and then click **Delete selected**.

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

11. View sign off information.

First | Previous 0 - 0 of 0   Next | Last

Clear | Add | Delete selected

Material Reporting

*Business Process	*Service Activity Code
Field Service	Field Service Return

Recovered part

*Item	*Description	Serial Number	*Service Date	*Quantity	*UO
			13-Nov-2003		

Find | Clear | Add

	Status	Service Activity Code	Product	Description	Inventory Locator Id	Quantity	UOM	Reason	Disposition Code	Service Da
☐	Used	qamfs mat order ib	AS18947	Sentinel Deluxe Desktop FS_Truck9		1	Each			12-Nov-200

First | Previous 1 - 1 of 1   Next | Last

Delete selected

Sign off

Name
World of Business
Date 13-Nov-2003
Save

Calendar | Task Details

The customer name, current date, and space for a signature appear at the bottom of the Quick Debrief page. You can print this page and have the customer sign off for the task in the signature area.

12. Click **Calendar** to return to the Calendar page.

Click **Task Details** to open the Information page (Task Details view) and view all the details for the task.

5.3.4 Creating a Personal Task

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

Steps

To create a personal task, complete the following steps:

1. Click the Calendar tab to open the Calendar page.

   The Daily View is the default view of the Calendar page.

2. Click **Create Personal Task**.

   The Calendar page displays the Create Personal Task view.

3. From the Type and Status drop-down lists, select the appropriate information.

4. Complete the Name field with the appropriate information.

   > **Note:** The Type and Status drop-down lists are mandatory along with the Name field.

5. Complete or modify any other fields in this window.

6. Click **Create**.

   Oracle Mobile Field Service/Laptop creates a personal task and then returns you to the Calendar: Daily View of the Calendar page.

5.4 Using the Information Page

The Information page is the central point for finding all the information about customers, service requests, and tasks. Whenever you request information from anywhere in the application, your request is linked to the Information page. This means that the Oracle Mobile Field Service/Laptop application will take you to the Information page when you search for information.

From the Information page, you can find information about the following:

- Customers
- Tasks
- Service requests
- Install base
- Inventory and order parts

From the Information page, you can also do the following:

- Create a service request
- Create a task
- Generate a report on tasks
- Print out service reports

5.4.1 Viewing Customer Information

Before you visit a customer site, you need to know the address and contact information.

You can obtain customer information from the following:

- The Information page
- The Calendar page, if a visit to that customer is scheduled (see "Using the Calendar Page" on page 5-6)
- Using the Quick Find function from the Home, Calendar, and Messaging pages (see "Using the Quick Find Function" on page 5-99)

This section describes how to use the Information page to obtain customer information.

Steps

Complete the following steps to view information about customers other than those who have a visit currently scheduled:

1. Click the Information tab to open the Information page.

2. From the View drop-down list, select **Customer**.

3. In the Search field, type the % wildcard character and then click **Go**.

   Customers appear under the Contents heading, on the left side of the page.

   If you know the customer for which you want to search, enter all or part of the customer name in the Search field. Use the % wildcard to represent one or more unknown characters.

   To narrow the search to more specific criteria:

   - From the View drop-down list, select **Customer** and then click **Advanced**.

     Additional fields are displayed on which you can search.

   - Complete one or more fields and then click **Search**.

     Use the % wildcard to represent one or more unknown characters.

     The customer or those matching the specified criteria appear under the Contents heading, on the left side of the page.

4. Click on the desired customer name.

   The Information page displays the Customer Details view.

The Information page (Customer Details view) displays the customer information, including contact information and any flexfields that are set up.

5. To view the customer product information for the customer, click on the person icon for the desired customer location.

The Information page displays the Customer Products view. This view list all the customer products for the customer.

6. Click **Close** to exit the Customer Products view.

7. In the Information page (Customer Details view), click **Notes** to view existing customer notes or to add a new customer note.

   See "Creating and Viewing Notes" on page 5-53 for a complete description of this procedure.

5.4.2 Viewing Install Base Information

Oracle Mobile Field Service/Laptop enables you to view the location and product details for a customer product. You are also able to view the configuration of the customer product and any additional attributes. Finally, you are able to view and add customer product notes.

Steps

Complete the following steps to view install base information:

1. Click the Information tab to open the Information page.

2. From the View drop-down list, select **Customer Product**.

3. In the Search field, type the % wildcard character and then click **Go**.

   Customer products appear under the Contents heading, on the left side of the page.

   If you know the customer product for which you want to search, enter all or part of the customer product name in the Search field. Use the % wildcard to represent one or more unknown characters.

   To narrow the search to more specific criteria:

   - From the View drop-down list, select **Customer Product** and then click **Advanced**.

     Additional fields are displayed on which you can search.

   - Complete one or more fields and then click **Search**.

     Use the % wildcard to represent one or more unknown characters.

     The desired customer product or those matching the specified criteria appear under the Contents heading, on the left side of the page.

4. Click on the desired customer product.

   The Information page displays the Installed Base Details view.

5. Click **Configuration**.

The Customer Products window opens.
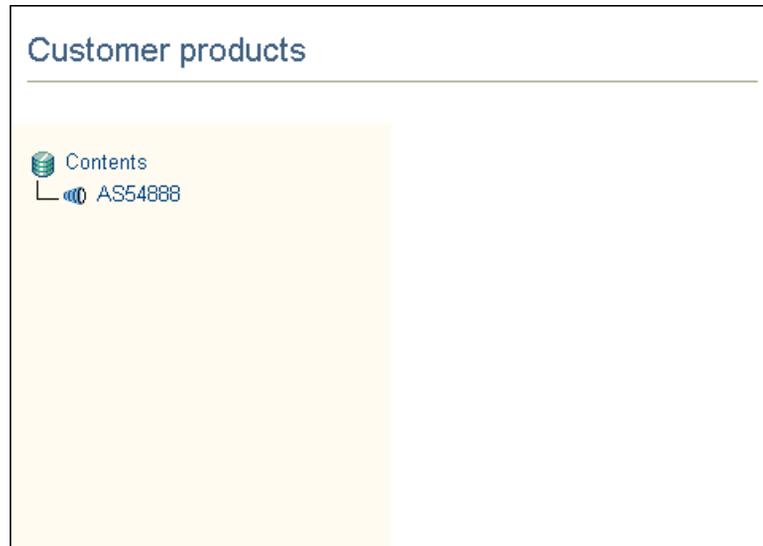
6. Select the desired service request.

The Customer Products window displays a customer product description.
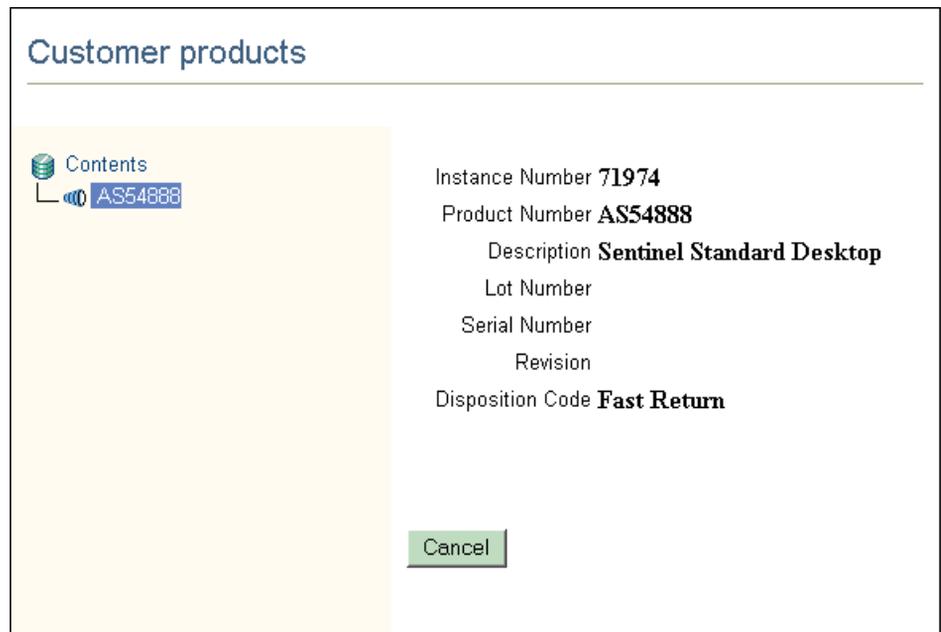
7. Click **Cancel** to return to the Information page (Installed Base Details view).

8. Click **Notes** to view existing customer product notes or to add a new customer product note.

   See "Creating and Viewing Notes" on page 5-53 for a complete description of this procedure.

5.4.3 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 field service representative. You can view the summary details of a service request in the calendar of the Calendar page. See "Viewing and Opening Tasks" on page 5-8 for a complete description of this procedure.

> **Note:** The field service representative can create a service request when necessary.

This section describes how to create, view, and change a service request. A service request contains the following groups of information:

- General

- Contact

- Product

- Service request

- Credit card

5.4.3.1 Viewing and Changing Service Request Information

The service request contains practical information, including the problem and likely resolution.

Steps

Complete the following steps to view service request information:

1. Click the Information tab to open the Information page.

2. From the View drop-down list, select **Service Request**.

3. In the Search field, type the % wildcard character and then click **Go**.

Service requests appear under the Contents heading, on the left side of the page.

If you know the service request for which you want to search, enter all or part of the service request name in the Search field. Use the % wildcard to represent one or more unknown characters.

To narrow the search to more specific criteria:

- From the View drop-down list, select **Service Request** and then click **Advanced**.

   Additional fields are displayed on which you can search.

- Complete one or more fields and then click **Search**.

   Use the % wildcard to represent one or more unknown characters.

   The desired service request or those matching the specified criteria appear under the Contents heading, on the left side of the page.

4. Click on the name of the desired service request.

The Information page displays the Service Request Details view for the selected service request.

5. Under the Product header, you can enter or change information for the following:

■ Product field—click the person icon next to this field to specify a new or different customer product. The Information page displays the Customer Products view.

Click the desired product code.

The Information page displays the Service Request Details view, with the new product information in the Product and Description fields. Click **Close** to exit the Customer Products view without selecting a customer product.

- Serial Number field—enter the serial number of the customer product specified in the Product field and Description drop-down list.

- System Item and Installed Base radio buttons—specify the type of customer product you specified in the Product field and Description drop-down list.

6. Under the Service Request header, you can enter or change information for the following:

   - Problem drop-down list—make a selection that describes the task problem.

   - Resolution drop-down list—make a selection that describes the task solution.

   - Customer PO Number field—enter the customer purchase order number in this field.

   - Flexfields—if these fields are set up, complete them according to your needs.

   To complete credit card information, see "Viewing and Entering Credit Card Information" on page 5-43.

   To create a service request note, click **Note**. See "Creating and Viewing Notes" on page 5-53 for a complete description of this procedure.

   To create a task, click **Create Task**. See "Creating a Task" on page 5-50 for a complete description of this procedure.

   To view the service history, click **Service History**. See "Viewing Service History" on page 5-45 for a complete description of this procedure.

5.4.3.2 Viewing a Service Request Attachment

From the Information page (Service Request Details view), you can open and view any attachment associated with a service request. The attachment can vary in type, such as a .pdf, .doc, .xls, .gif, etc.

1. Navigate to the Information page (Service Request Details view).

   See "Viewing and Changing Service Request Information" on page 5-34 for a complete description of this procedure.

2. Tap the attachment icon on the page.

   The Attachments page opens.

3. Tap the file that you want to open.

   The selected file opens.

   Tape **Done** to return to the Information page (Service Request Details view).

5.4.3.3 Creating a Service Request

When you are at a customer site, the customer may have an additional request. As an additional service, you can create a service request for this customer.

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)

The service request contains the following detailed information:

- Request status
- Type
- Severity
- Urgency
- Problem resolution
- Customer product involved
- Installation address
- A summary of the problem or reason for request

There are three ways you can create a service request for a customer:

- Based on an existing service request which serves as a template
- Based on no existing service requests where you have to enter all the necessary information
- Based on the customer product serial number

Steps

To create a service request, complete the following steps:

1. Click the Information tab to open the Information page.

   As an alternative, you can click on the task number of the desired service request in the Calendar page. This action will take you to the Information page with service request information displayed for the desired task.

2. Choose the desired customer for which you want to create a service request.

See "Viewing Customer Information" on page 5-34 for a complete description of this procedure.

3. Click **Create Service Request**.

The Information page displays the Create Service Request view.

To populate all the fields of the Create Service Request view based on an existing template, select a template from the Use the following task as template drop-down list. After you make this selection, you are able to change any field you want in the Create Service Request view.

4. To change the defaults in the Type, Status, Severity, and Urgency drop-down lists, make different selections.

> **Note:** The Type, Status, and Severity drop-down lists are mandatory along with the Summary field.

5. Complete the Summary field with the appropriate information.

6. Complete any other fields in the Create Service Request view.

   If the product is known, then select the Install Base Product check box and specify the product in the Product field.

7. Click **Create**.

   The Information page displays the Service Request Details view. See "Viewing and Changing Service Request Information" on page 5-34 for a complete description of this page.

5.4.3.4 Viewing Contractual Information

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

- Customer entitlements
- Contract coverage

Oracle Mobile Field Service/Laptop displays contractual information in a table format that you can reference for transaction billing types.

Steps

Complete the following steps to view contractual information:

1. Click the Information tab to open the Information page.

2. Choose the desired service request for which you want contractual information.

   See "Viewing and Changing Service Request Information" on page 5-34 for a complete description of this procedure.

3. Under the Contents heading, click the "+" button to the left of the desired service request.

The task(s), field service request report, customer product(s), and contract are listed below the service request.

4. Click on the contract.

The Information page displays the Contract Line Details view.

The contract number appears in the Contract number field and 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. To change a business process, make a selection from the Business process drop-down list.

Under the Transaction Billing Types header is a table that describes each aspect of the contract. The contents of this table are determined by the business process that you select in the Business process drop-down list.

For example, you could have an Extended Notebook PC Service Program that covers eight transaction billing types, each with a maximum amount of

$100,000. The percent of the money covered by the service organization varies from transaction billing type. For instance, a loaner notebook computer can be provided under a Loaner transaction billing type with 10% coverage, so the service organization would only be responsible for 10% of the cost. If there was a repair estimate, then an Estimate Repair transaction billing type with 100% coverage could apply, and the service organization would not be responsible for any cost.

5.4.3.5 Viewing and Entering Credit Card Information

Oracle Mobile Field Service/Laptop enables you to record or update the following credit card information from the customer point-of-service:

- Credit card number

- Expiration date

- Credit card type

- Customer name

With this information saved, you do not have to re-enter it. The credit card information is encrypted so it is secure. Only the last four digits of the credit card number is visible in the application.

When you synchronize with the enterprise system, the credit card information is validated. See "Synchronizing with the Enterprise System" on page 5-100 for a complete description of this procedure.

> **Note:**   The credit card feature is set in a profile. Consult your field service administrator on the use of this feature.

Steps

Complete the following steps to view and enter credit card information:

1. Click the Information tab to open the Information page.

2. Choose the desired service request for which you want credit card information.

   See "Viewing and Changing Service Request Information" on page 5-34 for a complete description of this procedure.

   At the bottom of the Information page (Service Request Details view) is the credit card information.

3. To record a customer's credit card information, complete the desired fields and drop-down lists under the Credit Card Details header.

   If the customer's credit card information has already been entered, you can edit this information by making changes in the desired field(s) and drop-down list(s). The credit card information should be validated to ensure that the credit card number provided by the customer is a valid.

4. Click **Save**.

   To create a service request note, click **Note**. See "Creating and Viewing Notes" on page 5-53 for a complete description of this procedure.

To create a task, click **Create Task**. See "Creating a Task" on page 5-50 for a complete description of this procedure.

To view service history, click **Service History**. See "Viewing Service History" on page 5-45 for a complete description of this procedure.

5.4.3.6 Viewing Service History

To best service the customer, field service representatives should review the customer's service history prior to making a customer visit. You can request service history for either a customer or a customer product. Only tasks and service requests that are closed or completed can 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 will be 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 time, material(s), and expenses for each customer visit

- Field service representative(s) who visited the customer previously

Steps

Complete the following steps to view service history:

1. Click the Information tab to open the Information page.

2. Choose the desired service request for which you want to view service history.

   See "Viewing and Changing Service Request Information" on page 5-34 for a complete description of this procedure.

3. Click **Service History** at the bottom of the Information page (Service Request Details view).

   The Information page displays the Service History view.

5.4.4 Working with Tasks

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

Update task status in order to keep your schedule up to date and to inform the dispatcher on the progress of your schedule. See "Viewing and Opening Tasks" on page 5-8 for a complete description of this procedure.

Oracle Mobile Field Service/Laptop enables you to view and change existing tasks and to create new ones.

5.4.4.1 Viewing and Changing Task Information

For a task assigned to you, you need to retrieve information such as what is the problem and what parts and materials are needed.

You can request task data from the following:

- The Information page

- Your daily calendar, if a visit to that customer is scheduled (see "Using the Calendar Page" on page 5-6)

- Using the Quick Find function from the Home, Calendar, and Messaging pages (see "Using the Quick Find Function" on page 5-99)

This section describes how to view and change task information.

Steps

Complete the following steps to see information about any task, not just those that are scheduled:

1. Click the Information tab to open the Information page.

2. From the View drop-down list, select **Task**.

3. In the Search field, type the % wildcard character and then click **Go**.

   For each customer, the service requests and tasks appear under the Contents heading, on the left side of the page.

   If you know the task for which you want to search, enter all or part of the task name in the Search field. Use the % wildcard to represent one or more unknown characters.

   To narrow the search to more specific criteria:

   - From the View drop-down list, select **Task** and then click **Advanced**.

     Additional fields are displayed on which you can search.

   - Complete one or more fields and then click **Search**.

     Use the % wildcard to represent one or more unknown characters.

     The desired task or those matching the specified criteria appear under the Contents heading.

4. Click on the desired task to view the task details.

The Information page displays the Task Details view, which contains information about the selected task.

If the task was escalated at the enterprise system, then the Escalated check box is selected.

5. To order parts for the current task, click the Order Parts link.

    The Information page (Search Results view) opens. For a complete description of this page, see "Ordering a Part" on page 5-85.

6. To access Quick Debrief, click the Quick Debrief link.

See "Using Quick Debrief" on page 5-12 for a complete description of this procedure.

7. In the Information page (Task Details view), under the Task header, ensure that the values in the fields and drop-down lists are correct.

> **Note:** The fields and drop-down lists under the Task header are enabled as long as Cancelled or Completed is not specified in the Assignment Status drop-down list.

The Planned Start Date and Planned End Date fields show the task start-and-end period according to the contract agreement. See "Viewing Contractual Information" on page 5-41 for complete contract details.

Depending on the business scenario your system administrator has chosen, you can enter the time that the visit is likely to take place in the Scheduled Start Date and Scheduled End Date fields. The actual start and end times for a task are listed in the time report. See "Creating and Deleting a Time Report Item" on page 5-57 for the actual time reporting.

Depending on the business scenario your system administrator has implemented, you may or may not be able to change the value in the Planned Effort field.

If flexfields are set up, change or complete them according to your needs.

8. Under the Task Assignment header, ensure that the selection in the Assignment Status drop-down list is correct.

> **Note:** The fields and drop-down lists under the Task Assignment header are enabled as long as Cancelled or Completed is not specified in the Assignment Status drop-down list.

9. Click **Notes** to view any existing task notes or to add a new task note.

See "Creating and Viewing Notes" on page 5-53 for a complete description of this procedure.

10. To save any changes to the task, click **Update**.

Click **Restore** to return the original values to the Task Details view.

5.4.4.2 Viewing a Task Attachment

From the Information page (Task Details view), you can open and view any attachment associated with a service request. The attachment can vary in type, such as a .pdf, .doc, .xls, .gif, etc.

1. Navigate to the Information page (Task Details view).

   See "Viewing and Changing Task Information" on page 5-47 for a complete description of this procedure.

2. Tap the attachment icon on the page.

   The Attachments page opens.

3. Tap the file that you want to open.

   The selected file opens.

   Tape **Done** to return to the Information page (Task Details view).

5.4.4.3 Creating a Task

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 representative, then you should create an additional task.

There are two ways you can create a task:

- Based on an existing task which serves as a template

- Based on no existing task where you have to complete all the desired fields

Prerequisites

A service request must already exist.

Steps

Complete the following steps to create a task:

1. Click the Information tab to open the Information page.

2. Choose the customer for which you want to create a task.

   See "Viewing Customer Information" on page 5-34 for a complete description of this procedure.

3. Under the Contents heading, click the "+" button to the left of a customer name to view service requests for the customer.

4. Click the service request for which you want to create a task.

The Information page displays the Service Request Details view.

- To specify the cause of the service request, select an item from the Problem drop-down list under the Service Request header.

- To specify the solution for the service request, select an item from the Resolution drop-down list under the Service Request header.

- Click **Save** to save the update.

5. Click **Create Task** at the bottom of the Service Request Details view.

The Information page displays the Create Task view.

> **Note:** To populate all the fields of the Create Task view based on an existing template, select a template from the Use the following task as template drop-down list. After you make this selection, you are still able to change any fields that you want in the Create Task view.

6. Select the appropriate information from the Type and Status drop-down lists.

> **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.

7. Enter the task name in the Name field.

> **Note:** The Type and Status drop-down lists are mandatory along with the Name field.

8. Complete or modify any other fields in this page.

9. Click **Create**.

   The Information page displays the Task Details view for the new task. The new task also appears under the service request, on the left side of the page. See "Viewing and Changing Task Information" on page 5-47 for a complete description of this page.

5.4.5 Creating and Viewing Notes

You can create and view notes for the following:

- Customer
- Customer product
- Service request
- Task

For example, you may note that a power supply has to be replaced by a refurbished one.

A note includes the following:

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

Complete the following steps to create and view a note:

1. Open the appropriate page.

   ■ To create and view a service request note, open the Information page (Service Request Details view).

     See "Viewing and Changing Service Request Information" on page 5-34 for a complete description of this procedure.

   ■ To create and view a task note, open the Information page (Task Details view).

     See "Viewing and Changing Task Information" on page 5-47 for a complete description of this procedure.

   ■ To create and view a customer note, open the Information page (Customer Details view).

     See "Viewing Customer Information" on page 5-26 for a complete description of this procedure.

   ■ To create and view a customer product note, open the Information page (Installed Base Details view).

     See "Viewing Install Base Information" on page 5-30 for a complete description of this procedure.

2. To view any existing notes or to add a new note, click **Notes**.

   A window opens, divide into a Notes section and a Note details section. The Notes section lists all the notes for the entity in question. The Note details section shows the date of note creation and the note author.

Notes

Date	Source	Note	Entered by	Note type	Status
06-Nov-2002	Party	customer note 2 b pa	Armstrong, Mr. Billie Joe	qa note type 1	Public
06-Nov-2002	Party	customer note 1 b pa	Qasermgr, Steve	qa note type 1	Public
06-Nov-2002	Party	customer note 2 b la	Manjrekar, Sanjay	qa note type 1	Public

First | Previous 1 - 3 of 82 Next | Last

Note details

Date		Entered by	Source
Note type		Note status	

Note

Add note   Close

When you click on a note listed in the Notes section, the note text appears in the Note field of the Note details section.

3. To create a new note, click **Add note**.

A new Notes window opens.

4. From the Note type drop-down list, select the note type.

> **Note:** For a note to appear on a customer invoice, the note type must be "Invoice".

5. From the Note status drop-down list, select the not status.

6. In the Note field, enter the note text.

7. Click **Save**.

Oracle Mobile Field Service/Laptop opens a new, blank Notes window where you can add another note.

The next time you synchronize with the enterprise system, the saved note is added.

8. Add another note as described above or click **Close** to close the Notes window.

5.4.6 Debrief Reporting

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

- Time   Describes how much time a task took to complete.

- Materials Describes what materials were involved in the completion of a task. This includes both replacement and recovered parts. This information is used by the home office to replenish part inventories.

- Expenses Describes the expenses required to complete a task.

Once field service representatives record any or all of the above information, they can then upload this information to the enterprise system by synchronizing Oracle Mobile Field Service/Laptop. With this information now in the enterprise system, the home office can review and update the customer install base, spare parts inventory, and billing information.

5.4.6.1 Creating and Deleting a Time Report Item

When you have completed a task, enter the amount of time the task took to complete along with other related information.

For a locally created time report item that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete this report item from the time report.

> **Note:** The actual times are determined when the field service representative sets a task assignment status to "Working" or "Closed." See "Viewing and Changing Task Information" on page 5-47 for a complete description of this procedure.
>
> Oracle Mobile Field Service/Laptop uses the labor times that you enter to calculate the actual times. If there are no reported labor times, the application uses the time status change time stamp.

Steps

Complete the following steps to create a time report item:

1. Click the Information tab to open the Information page.

2. Choose the desired task for which you want to create a time report.

   See "Viewing and Changing Task Information" on page 5-47 for a complete description of this procedure.

3. Under the Contents heading, click the "+" button to the left of the desired task.

All the reports for the task are listed, including the time report.

4. Select **Time Reporting**.

The Information page opens the Time Reporting view. This view contains default values for the Business Process, Labor Type, Labor Item, and UOM drop-down lists along with the Start Time and End Time fields.

> **Note:** The Business Process, Labor Type, and Labor Item drop-down lists are mandatory. To specify the length of the task, *either* the Start Time and End Time fields are mandatory *or* the Duration field and UOM drop-down list are mandatory. Specify the length of time using one of these pairs, but not both.

5. To change the default business process, Customer Support, make the appropriate selection from the Business Process drop-down list.

6. To change the default service activity code, make the appropriate selection from the Service Activity Code drop-down list.

7. To change the default labor item, make the appropriate selection from the Labor Item drop-down list.

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

In the following steps, specify the amount of labor time used to complete the task. Complete *either* steps 9 and 10 *or* steps 11 and 12, according to your business process.

9. Specify a task start time:

   - Click the calendar button near the Start Time field and then select the task start date.

     For a complete description of this procedure, see "Viewing a Past or Future Calendar" on page 5-11.

   - From the hour and minutes drop-down lists, select the time you started a task.

     The hour drop-down list provides values for 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.

10. Specify a task end time:

   - Click the calendar button near the End Time field and then select the task end date.

     For a complete description of this procedure, see "Viewing a Past or Future Calendar" on page 5-11.

   - From the hour and minutes drop-down lists, select the time you ended a task.

     Again, the hour drop-down list provides values for the 24-hour clock format.

11. In the Duration field, enter the length of time the task took to complete.

12. From the UOM drop-down list, select the unit of time that describes the value in the Duration field.

13. From the Labor Reason Code drop-down list, select the reason code that best describes the time reporting.

14. For any flexfields, complete these according to your needs.

15. Click **Add**.

    The time report item is saved to your laptop computer. In the Summary of Reported Labor table, the new time report item is now listed.

    To delete the newly created time report item, select the time report item and then click **Delete selected**.

5.4.6.2 Creating and Deleting a Material Report Item

After you complete a task, you can record what materials 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 an 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 representatives are assigned to a task, then you can create multiple material reports for a task. You can also report several transactions in a material report. For each material transaction, a separate line is created in the report.

For a locally created material report item that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete this report item from the material report.

Steps

Complete the following steps to create a material report item:

1. Click the Information tab to open the Information page.

2. Choose the desired task for which you want to create a material report.

   See "Viewing and Changing Task Information" on page 5-47 for a complete description of this procedure.

3. Under the Contents heading, click the "+" button to the left of the desired task.

   All the reports for the task are listed, including the material report.

4. Select **Material reporting**.

The Information page displays the Material Reporting view. There are two versions of this view: one for recovered parts and the other for used parts. In both versions, there are default values for the Business Process and Transaction Type drop-down lists.

5. To change the default business process, Customer Support, make the appropriate selection from the Business Process drop-down list.

The business process selection determines the selection in the Transaction Type drop-down list. The selection in this drop-down list determines whether fields and drop-down lists for a used or recovered part appear in the Material Reporting view.

6. To change the default transaction type, make the appropriate selection from the Transaction Type drop-down list.

7. Click **Find** to locate and select the part.

    If you have enough information to describe the part, you can complete the mandatory fields and any other fields and then click **Add**. (Mandatory fields are denoted with an asterisk [*])

    After you click **Find**, either the Information page displays the Search Materials view or the Customer Products window opens. If you are searching for a recovered install-base part, then the Customer Products window opens.

    Selecting a Recovered Install Base Part

-   Select the desired service request.

    The Customer Products window displays a recovered install base part.

Customer products

Contents
└ AS54888

Instance Number **82268**
Product Number **qamfsmat5inb1ins3**
Description **qamfs_mat5_inb1_ins3**
Lot Number
Serial Number **qamfs_mat5sno**
Revision
Disposition Code **Fast Return**

Cancel   Ok

- Click **OK**.

  The recovered install base part appears in the Information page (Material Reporting view) under the Recovered Part header.

■ Proceed to step 8.

Selecting a Part that is Not Recovered and Install Base

- Click **Find** without completing any fields or the drop-down list.

  The Search Results section appears in the Search Materials view of the Information page. This section displays all the possible parts for the task.

If you know information about the desired part and would like to limit your search:

– Complete any of the fields and the drop-down list in the Information page (Search Materials view).

These fields are self-explanatory.

– Click **Find**.

The Information page (Search Materials view) displays the part(s) for the task under the Search Results header.

■ Under the Search Results header, select the desired part.

The Search Materials view closes and the selected part appears in the Material Reporting view under the Used Part header or Recovered Part header, depending on the type of material report item you are reporting.

8. In the Serial Number field of the Information page (Material Reporting view), enter an optional serial number for the part.

Add the serial number for a part that is serial-number based and has no serial number allocated to the item instance.

9. Click **Add** to add the selected material report item to the material report.

The material report item is saved to your laptop computer. The Information page (Material Reporting view) displays the part, along with a detailed description in the Summary of Reported Materials table. In this case, Item AS18947 is saved and added to the Summary of Reported Materials table.

To remove the selected part description from the Material Reporting view, click **Clear** instead of **Add**.

To delete the newly created material report item, select the material report item from the Summary of Reported Materials table and then click **Delete selected**.

5.4.6.3 Creating and Deleting 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.

For a locally created expense report item that has not been synchronized, Oracle Mobile Field Service/Laptop enables you to delete this report item from the expense report.

Steps

Complete the following steps to create an expense report item:

1. Click the Information tab to open the Information page.

2. Choose the desired task for which you want to create a expense report item.

    See "Viewing and Changing Task Information" on page 5-47 for a complete description of this procedure.

3. Under the Contents heading, click the "+" button to the left of the desired task.

    All the reports for the task are listed, including the expense report.

4. Click **Expense reporting**.

    The Information page displays the Expense Reporting view. This view contains default values for the Business Process, Expense Type, Expense Item, UOM, and Currency drop-down lists.

> **Note:** The Business Process, Expense Type, and Expense Item drop-down lists are mandatory. To specify the expense of the task, *either* the Quantity filed and UOM drop-down list are mandatory *or* the Cost field and Currency drop-down list are mandatory. Specify the expense using one of these pairs, but not both.

5. To change the default business process, Customer Support, make the appropriate selection from the Business Process drop-down list.

6. To change the default expense type, make the appropriate selection from the Expense Type drop-down list.

7. To change the default expense item, make the appropriate selection from the Expense Item drop-down list.

8. Specify the cost and currency that describes the expense.

   The Quantity field and UOM drop-down list are used together while the Cost field and Currency drop-down list are paired together. In your description, complete only *one* of these field-and-drop-down list combinations.

   - In the Cost field, enter the cost of completing the task. In the Currency drop-down list, ensure that the default currency is correct. If necessary, change it to the correct currency.

   - Complete the Quantity field and UOM drop-down list if the pricing amount is unknown.

9. Click **Add** to add the selected expense report item to the expense report.

   The expense report item is saved to your laptop computer. The Information page (Expense Reporting view) displays the part, along with a detailed description in the Summary of Reported Expenses table.

   Click **Clear** to remove the selected part description from the Expense Reporting view.

To delete the newly created expense report item, select the expense report item and then click **Delete selected**.

5.4.6.4 Printing the Field Service Request Report

You can print out a document that summarizes all the information about time, material, and expenses for a service request. This is useful for leaving at the customer site, or for getting a signature.

Steps

Complete the following steps to print the Field Service Request Report.

1. Click the Information tab to open the Information page.

2. Choose the desired service request for which you want to print a report.

   See "Viewing and Changing Service Request Information" on page 5-34 for a complete description of this procedure.

3. Under the Contents heading, click the "+" button to the left of the service request for which you want to print a report.

   The field service request report, the customer product (install base), and task(s) appear under the selected service request.

4. Click **Field Service Request Report**.

   The summary appears, showing the Reported time, Reported material, and Reported expenses. The current date and space for a signature appear at the bottom of the report.

5. Click **Print** in your browser window.

5.4.6.5 Printing the Field Service Task Report

You can print a report that summarizes all the information about time, material, and expenses for a task. This is useful for leaving at the customer site, or for getting a signature.

The time, material, and expenses report information that you entered for a task is listed in the Field Service Task Report under descriptive headers. This information is limited to what you recorded for a particular task.

Steps

Complete the following steps to print the Field Service Task Report:

1. Click the Information tab to open the Information page.

2. Choose the desired task for which you want to print a report.

   See "Viewing and Changing Task Information" on page 5-47 for a complete description of this procedure.

3. Under the Contents heading, click the "+" button to the left of the desired task to list all the task reports, including the Field Service Task Report.

4. Click **Field Service Task Report**.

   The summary appears, showing the reported time, material, and expenses. The customer and task details are also shown. The customer name, current date, and space for a signature appear at the bottom of the Field Service Task Report for customer sign off.

5. Click **Print** in your browser window.

5.4.7 Setting Counters and Counter Properties

You can log a service request for a customer product that contains a counter. A counter helps a service representative determine how much work was done before a customer product was serviced. A copier having a number-of-copies counter is an example of this.

On the Information page, there can be multiple customer product counters, each with multiple readings. From these multiple readings, you can learn the service history of the customer product. You can also create new readings for a customer product counter. You can reset a reading as well as make miscellaneous readings. A *miscellaneous reading* can be a value used for testing a customer product. For example, an engineer who is fixing a copier may make ten test copies after completing the service. The copy counter value increases by ten, but he does not want the customer to pay for the test copies. Therefore, the field service representative can state a miscellaneous reading of ten.

Finally, you can enter counter properties. Counter properties describe something about the customer product counter.

Steps

Complete the following steps to enter a counter reading and set the counter properties:

1. Click the Information tab to open the Information page.

2. Choose the desired customer product for which you want to enter a counter reading and set the counter properties.

   See "Viewing Install Base Information" on page 5-30 for a complete description of this procedure.

3. Under the Contents header, click the "+" button to the left of the desired customer product to view the counter.

   > **Note:** Only customer products with the "+" button contain a customer product counter.

4. Click on the customer product counter.

   The counter readings for the selected customer product appear in the Counter Readings view of the Information page. These counter readings are for specific dates.

5. Click **New Reading**.

The Information page displays the Counter Reading view.

6. Enter the appropriate information in the Date and Reading fields.

> **Note:** The Date and Reading fields are mandatory. The *date* is the date you take a reading and the *reading* is the counter value that you want to record.

7. Complete or change any other fields in this page.

- Make the appropriate selection from the Misc. Reading Type drop-down list and complete the Misc. Reading field to make miscellaneous readings.

- Select the Reset Flag check box and then complete the Pre-reset Last Reading and Post-reset First Reading fields to reset the counter.

Pre-reset is the last counter value before the reset of the counter. Post-reset is the first new reading after the reset.

8. Complete the property fields for your customer product.

9. Click **Save**.

Oracle Mobile Field Service/Laptop returns to the Counter Readings view of the Information page where the new counter reading is listed.

5.4.8 Spares Management

Oracle Mobile Field Service/Laptop enables you to manage the parts inventory that you can use in the repair or replacement of parts for a service request. The parts in inventory are known as *spares* and their management is known as *spares*

management. Spares management is a critical process in field service. Spares are not only stored in the warehouse, but also inside the truck of a field service representative. It is therefore crucial to know where spares are located and how soon a field service representative can have them. In spares management, Oracle Mobile Field Service/Laptop allows you to do the following:

- Oversee the inventory stocked in the truck

- Manage spare parts

- Order and transfer parts

- Oversee defective parts that need to be sent back

- Maintain stock levels and install base

- Stay current with business information

- Print out service reports (time, material, expenses) for a customer

5.4.8.1 Ordering a Part

Oracle Mobile Field Service/Laptop enables you to order parts from inventories assigned to you and those that are not assigned to you (sub-inventories). The latter case requires you to do a advanced search where you supply specific information about the desired part.

Prerequisites

- Desired part must already exist, either in the vehicle or at some other location (only applicable if Spares Management is being used). See the *Oracle Mobile Field Service Implementation and Administration Guide for Field Service/Laptop* for details about Spares Management.

- Desired part must be defined as "orderable".

Steps

Complete the following steps to order a part:

1. Click the Information tab to open the Information page.

2. From the View drop-down list, select **Inventory**.

3. In the Search field, type the % wildcard character and then click **Go**.

    Inventories appear under the Contents heading, on the left side of the page.

If you know the inventory for which you want to search, enter all or part of the inventory name in the Search field. Use the % wildcard to represent one or more unknown characters.

> **Note:** You can specify an inventory not assigned to you if it contains the desired part. In this case, continue with the following steps to narrow the search.

To narrow the search to more specific criteria:

- From the View drop-down list, select **Inventory** and then click **Advanced**.

  Additional fields are displayed on which you can search.

- Complete one or more fields and then click **Search**.

  Use the % wildcard to represent one or more unknown characters.

  The desired inventory or those matching the specified criteria appear under the Contents heading, on the left side of the page.

4. Under the Contents heading, click the "+" button to the left of the desired inventory to view the inventory items.

5. Click on an inventory.

   The inventory items for the selected inventory appear in the Search Results view of the Information page.

6. In the Select column, click the button of the desired part and then click **Order**.

   The Information page displays the Order an Item view.

   Click **Transfer** to transfer a part. See "Transferring a Part" on page 5-89 for a complete description of this procedure.

7. Complete the Quantity field with the appropriate information.

8. Select the appropriate information from the UOM (Unit Of Measure), Subinventory, and Shipment location drop-down lists.

> **Note:** The Quantity field along with the UOM, Subinventory, and Shipment location drop-down lists are mandatory. The shipment location is where you want the part delivered.

9. Complete the Need by date field to specify a part delivery date.

10. Click **Save** to place the order.

   Click **Restore** to cancel the order.

5.4.8.2 Transferring a Part

This section describes how to transfer a part from one sub-inventory to another.

Steps

Complete the following steps to transfer a part from a sub-inventory:

1. Click the Information tab to open the Information page.

2. Choose the desired inventory from which you want to transfer a part.

   See "Ordering a Part" on page 5-85 for a complete description of this procedure.

3. From the Select column in the Information page (Search Results view), click the button of the desired part and then click **Transfer**.

   The Information page displays the Transfer Parts view.

Click **Order** to order a part. See "Ordering a Part" on page 5-85 for a complete description of this procedure.

4. From the Subinventory drop-down list, select the subinventory from which you want to transfer a part.

5. From the To subinventory drop-down list, select the destination subinventory where you want transfer a part.

6. From the Quantity field, specify the amount of parts you want to transfer.

7. From the UOM drop-down list, select the unit of measure for the amount.

> **Note:** The Subinventory, To subinventory, Quantity, and UOM
> drop down lists are mandatory.

8. From the Reason drop-down list, select the reason for the transfer.

9. In the Reference field, specify the transfer reference.

10. Click **Add**.

A summary of the part transfer appears in the Transfer Lines table.

Click **Cancel** to exit without saving.

5.4.8.3 Viewing Part Order Details

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

Prerequisites

A part must be ordered to view the order details.

Steps

Complete the following steps to view part order details:

1. Click the Information tab to open the Information page.

2. From the View drop-down list, select **Order**.

3. In the Search field, type the % wildcard character and then click **Go**.

Item descriptions appear under the Contents heading, on the left side of the
page. These descriptions include the item number, status, and requirement
number

If you know the item for which you want to search, enter all or part of the item
name in the Search field. Use the % wildcard to represent one or more unknown
characters.

To narrow the search to more specific criteria:

- From the View drop-down list, select **Order** and then click **Advanced**.

  Additional fields are displayed on which you can search.

- Complete one or more fields and then click **Search**.

Use the % wildcard to represent one or more unknown characters.

The desired item or those matching the specified criteria appear under the Contents heading, on the left side of the page.

4. Click on the name of the desired item.

A detailed description for the selected item appears in the Item Order Details view of the Information page.

5.5 Using the Messaging Page

Oracle Mobile Field Service/Laptop enables you to send and receive messages to other people within your organization. This messaging function facilitates communication among field service employees. It can be set up to send messages among all Field Service users, or among the members of one team.

You can use this page to send or receive messages. You can use this to ask for support or additional information.

5.5.1 Viewing Received Messages

After you synchronize with the enterprise system, you can check to see if you have received any messages.

Steps

Complete the following steps to read messages that you have received, and to delete messages that you have read:

1. Click the Messaging tab to open the Messaging page.

2. Ensure that the Inbox subtab is selected.

3. To read a message, click on the message subject in the Subject column.

    A window opens showing the complete message. A blue icon next to the Subject indicates that the message has an attachment.
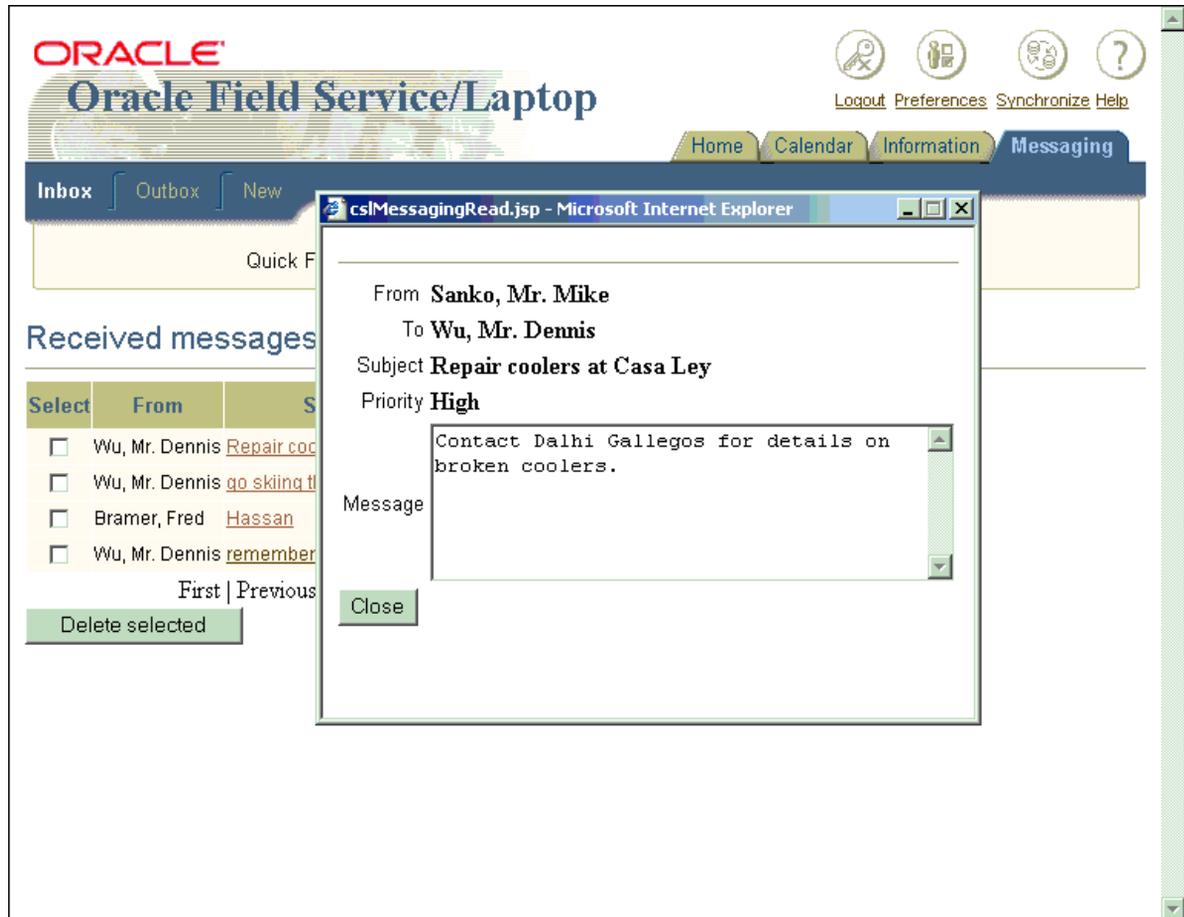
4. To reply to a message, click **Reply**.

   A new message with a blank Message field appears. The subject and recipient fields are already completed.

5. To delete a message, select the check box to the left of the desired message and then click **Delete selected**.

   The check box is in the Select column.

5.5.2 Writing and Sending New Messages

When you need information from one of the other members of the field service organization, you can ask for it by sending a message.

Steps

Complete the following steps to write and send messages to others people in your field service organization:

1. Click the Messaging tab to open the Messaging page.

2. Click the New subtab.

3. From the To drop-down list, select the recipient's name.

4. In the Subject field, enter a title or brief summary of the message.

5. Change the information in the Priority drop-down list, if necessary.

6. In the Message field, enter the text of the message.

   Messages can be up to 255 characters long.

7. Click **Send** to send the message.

5.5.3 Viewing Sent Messages

In the Messaging page, you can ensure that a message you wrote has been sent to the intended person(s) in your field service organization.

Steps

Complete the following steps to view the messages you have sent:

1. Click the Messaging tab to open the Messaging page.

2. Click the Outbox subtab.

   The messages you have recently sent appear.

3. Click on the recipient's name in the To column to see the user IDs of the other mobile users.

4. Choose the recipient's name.

5. Click on the message in the Subject column to see the text of the message that you sent.

5.6 Using the Home Page

The Home page is updated with the number of task at a particular status each time you synchronize with the enterprise system.

Steps

Complete the following to access the Home page:

■ Click the Home tab to open the Home page.

In this page, you can view the Tasks Summary table. This table lists how many tasks are at a particular status.

5.7 Using the Quick Find Function

You can perform a quick find from the Home, Calendar, and Messaging pages. A quick find allows you to locate any of the following:

- Customer
- Customer product
- Inventory
- Item
- Order
- Personal task
- Service request
- Task

Steps

To do a quick find, complete the following steps from either the Home, Calendar, or Messaging pages:

1. From the Quick Find drop-down list, select the type of information for which you want to search.

2. In the search field, enter the word or numbers for which to search.

   Use the % wildcard to represent one or more unknown characters.

3. Click **Go**.

   The Information page opens and the search results are displayed in an outline on the left side of the page.

   To narrow the search to more specific criteria:

   - From the Quick Find drop-down list, select a value and then click **Advanced Search**.

     Additional fields appear that correspond to the type of information you entered in the Quick Find drop-down list.

   - Complete one or more fields and then click **Search**.

     Use the % wildcard to represent one or more unknown characters.

5.8 Global Button Functionality

The global buttons are located in the upper right corner of each page in the Oracle Mobile Field Service/Laptop application.

5.8.1 Preferences Button

Click the **Preferences** button to view your profile settings. Profile options are set by the system administrator at the home office.

5.8.2 Synchronizing with the Enterprise System

In order 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 debrief lines and updating task statuses to the enterprise system, you need to synchronize with the enterprise system.

Steps

Complete the following steps to synchronize Oracle Mobile Field Service/Laptop information with the enterprise system:

1. Establish a telephone / internet connection for your laptop computer.

2. Click the **Synchronize** button in the upper right corner of the page.

    The Oracle9*i* Lite Client Synchronization page opens.
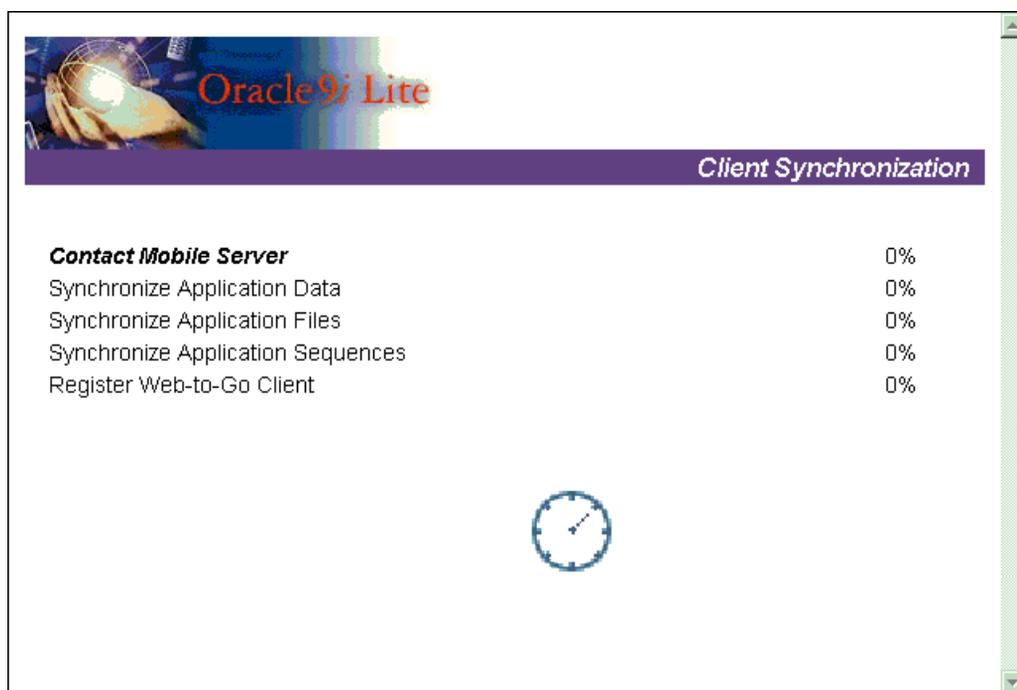
The information on your laptop computer is synchronized with the enterprise system. Synchronizing your data can take a few minutes; therefore, do not abort this process. If the synchronization process fails, contact your system administrator.

After synchronization completes, the browser displays the Oracle Mobile Field Service/Laptop Calendar page.

5.8.3 Obtaining Online Help

The online help for the Oracle Mobile Field Service/Laptop application is an online version of the *Oracle Mobile Field Service User Guide*.

Steps

Complete the following steps to obtain online help:

1. Click the **Help** button in the upper right corner of any page.

    Oracle Mobile Field Service/Laptop displays an online version of the *Oracle Mobile Field Service User Guide*.

2. Navigate through the hyperlinks to find the desired information.

5.8.4 Logging Out

When you have finished working in Oracle Mobile Field Service/Laptop, log out of the application.

Prerequisites

Save all data and be ready to exit the application.

Steps

Do the following to log out of Oracle Mobile Field Service/Laptop:

- Click the **Logout** button in the upper right corner of any page.

  Oracle Mobile Field Service/Laptop checks that all data has been correctly saved and then closes. The application returns you to the login page.

A

Scheduling and Completing Tasks

The administrator can organize the Oracle Mobile Field Service application in several different ways, depending on how much control a field service representative is given over his schedule. This appendix describes several different levels of control for the field service representative.

A.1 Conform to the Schedule

The field service representative 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 Installation at Customer A

- task 2: 9:00 Repair on-site at Customer B

- task 3: 10:00 Installation at Customer C

The field service representative first needs to finish task 1 before going on to task 2. He needs to follow the pre-defined order of the dispatcher. The field service representative cannot reschedule a task, but he can reject a task.

This setup gives the dispatcher control over the daily schedule of the field service representative. The dispatcher sets up the tasks, including what time and where the field service representative is to be at all times.

A.2 Order of Task Completion

If you send more than one field service representative 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 representatives. You set up the task and then you send it to the task lists of all three representatives. It now appears on their task list. However, if one of your field service representatives changes the time for his task, that would affect the task list of the other two representatives. To avoid this, you must create three tasks, one for each representative.

The service representative can complete his scheduled tasks under different scenarios.

Scenario 1: Complete Scheduled Tasks in Pre-determined Order

In this scenario, the field service representative 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 representative works on a 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 representative works on multiple jobs at a time and does not conform to the dispatched schedule.

Scenario 2 and Scenario 3 gives the field service representative control over his day. The dispatcher sends the tasks and locations to the field service representative, and the service representative then decides when to perform each task. This scenario works well in an environment where each task requires only one field service representative. For example, if a field service representative has a dental appointment, he can arrange the time he wants to be at the customer site near his dentist. The field service representative 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.

A.3 General Operating Rules

This section describes some 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" on page A-2.

The following are the general rules for working in Oracle Mobile Field Service:

- You can add notes, but notes are not updatable once 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. (Synchronized debrief lines cannot be updated.)

  See "Understanding the Task List Screen" on page 3-6 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, a signature cannot be updated.

- Once a you complete or close a task, you cannot add counters.

- Counters are not updatable.

Index