

## **At your service: Using Oracle's Field Service suite to better serve your customers**

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**Introduction** - Luminex implemented the Oracle Financials and Manufacturing suites in 2000. In early 2005 they decided to add the Service Suite of products to improve efficiencies in the field, integrate their customer support system with the existing customer master, improve inventory controls for spare parts, automate warranties and service contracts, gain visibility to where their systems live (Install base), improve reporting and increase customer satisfaction.

**Company Background** - Luminex Corporation was incorporated in May 1995 and began commercial production in 1997. Luminex® develops, manufactures and markets innovative biological testing technologies with applications throughout the life-sciences industry. The company's open-architecture xMAP® technology enables large numbers of biological tests (bioassays) to be conducted and analyzed quickly, cost-effectively and accurately.

**Implementation Overview**– The implementation was kicked off in April 2005 and was scheduled to go-live in November 2005. The actual go-live occurred in February 2006. The modules implemented were 11.5.10.2:

- Teleservice
- Knowledge Management
- Field Service/Wireless
- Depot Repair
- Spares Management
- Install Base
- Email Center
- Service Contracts
- iSupport.

The implementation team consisted of one functional consultant, the client business analyst, the client developer (as needed) and the client's Director of IT. This was not a typical consulting engagement, where a much larger team would typically be used, due to the strong Oracle knowledge and development skills of the client team.

There were several reasons that the go-live date was pushed out by 3 months and they include: a complete restructuring of the BOMs, the release of a new product line and the need to revisit serialization. It was determined early on that Luminex's existing BOM and serialization setup was not adequate to meet the needs of the Technical Support and/or Field Service organization.

**Challenges Faced** –The BOM structure and item setups (kit) did not support the way that warranties are handled in Oracle so the BOMs for the existing product lines were restructured and the BOMs for the new product line (that launched in Sept. 2005) were redefined. The result was flattened BOMs and a switch from kits to PTO models.

A serialization "mini project" also resulted which basically put the implementation on hold for about 6 weeks and re-focused the team. The serialized components that Field Service typically replaced were buried several levels deep in the BOM. In order for Install Base to appropriately reflect the serialized component and allow it to be transacted by Field Service, each level above that item needed to be serialized as well. The initial setup had the instruments being serialized at issue (shipment) but this was not sufficient to correctly "build" the structure in the Install Base as the items were created in WIP. Once the BOMs were re-structured and flattened, the serialization had to be re-addressed for each sub-assembly level and either had to be changed or set to "At Receipt". This change was made in conjunction with the setting of the "Track in Install Base" flag since both updates to the item(s) require all of the

inventory to be issued out and then re-received after the update. This change was huge from the end user perspective since it impacted how they did their daily job and required a high level of change management and training.

A situation that arose due to Service being implemented on top of an existing Oracle Financials and OM footprint was that when iSupport was being implemented, all of the customer contacts already existed in Oracle so the registration process would result in duplicate data. Since there is not an “out of the box” way to give existing customer contacts access to iSupport, we had to be creative and basically mimic the way an Oracle “contact of an existing company” registration works. This involved changing all of the contacts from “Contact of” to “Employee of”, linking the contact to a username and getting the roles and responsibilities assigned properly. This manual process still occurs today as more of the existing customer base decides that it would like to use iSupport to log and track service requests.

Another hurdle that was faced during the implementation was a database upgrade from 9.2.0.6 to 9.2.0.7 and an applications upgrade from 11.5.9 to 11.5.10.2 that was occurring during the first month of the implementation. This consumed a great deal of the IT team and end user’s time and made the setting up for CRP challenging.

**From the legacy system to Oracle** - From the business side, one of the main obstacles that we had to overcome was the drastic change from the way things were handled in the legacy system to the way they would be done in Oracle. The legacy system that was used for both Technical Support and Field Service was RightNow Technologies (RNT). This system used a single web form to capture all data related to SRs and Field Service dispatch activities. Different views were created to capture “Machine Data” (Install Base Information) and customer information. The application was very flexible and was able to be “customized” and maintained by the Tech Support Manager (vs. IT).

However, the main pain point(s) of the legacy system was that it was completely dis-jointed from Oracle so all service related data had to be manually entered and maintained. For example, when a product was shipped, an email alert was sent to Tech Support with the details and they manually created a “machine data” entry for that instrument and its components. Also, when an RMA was authorized, the Tech Support group would send an email with the details to the orders group and they would manually input the RMA into Oracle Order Management.

Since Field Service calls were handled in RNT but any billing for that work occurred in Oracle, there was a very intensive manual reconciliation process that only occurred once a quarter which resulted in lost revenue and delayed invoicing. The fact that customer and contact data was maintained in RNT for service related calls basically resulted in 2 customer “masters” and finance did not have a consolidated list of its customers. See Appendices A and B for the initial and Oracle system roadmaps.

The data from the application was hosted and was stored in a single pipe-delimited format.

The format and accessibility of the data added a great deal of complexity and extended the timeline for the data conversion. The developer had to take a single row of data and map it so that it could be converted in as Customer data, Service Contracts, Install Base records, Service Requests and Tasks. The mapping and matching of the customer data was especially complex as there was not a standard naming convention followed which resulted in a fair amount of duplicate data being converted in and then later merged.

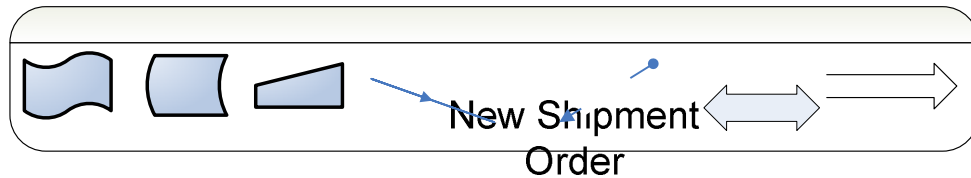
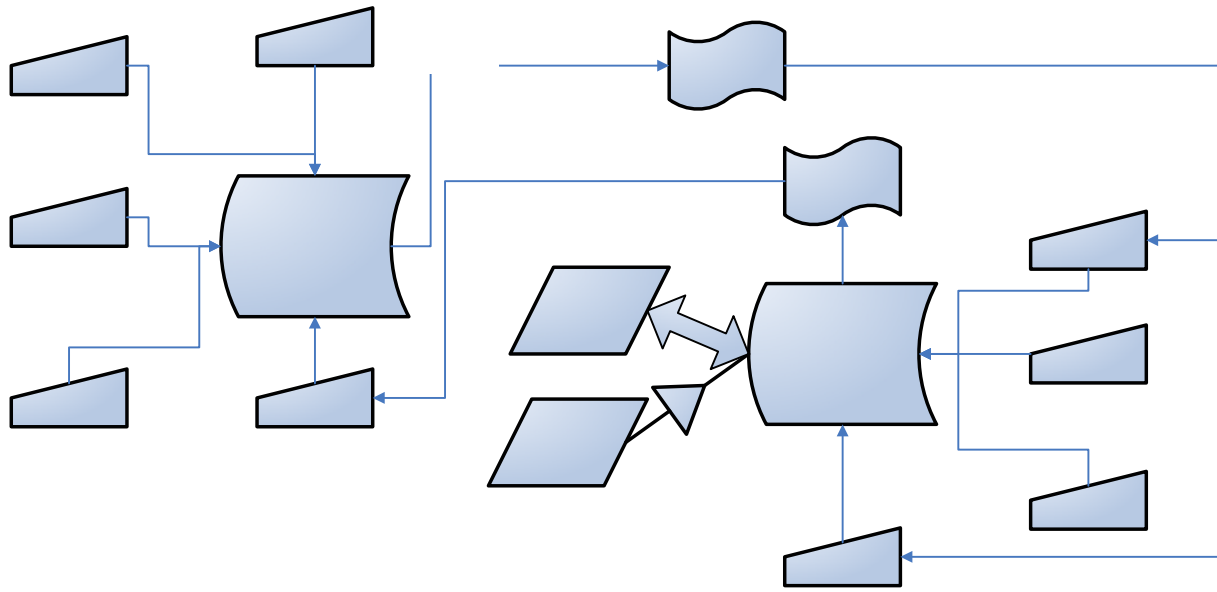
**The end result** – Overall the implementation was a huge success that dramatically changed and improved the way that Luminex supports and serves their customers. An immediate benefit that resulted from the integrated system was a 3 fold increase in Service revenues the first month due to service work and the billing for that work happening simultaneously.

The ability to receive and update tasks via a Blackberry was a big win for Field Service and it was one of the main drivers for moving to Oracle Service. Tech Support is now working with an integrated system that allows them to see and follow-up on all activities related to a customer and they now only have to do manual updates on an exception basis instead of daily. The integrated customer master has resulted in better visibility across the organization and has improved reporting capabilities company-wide.

The Universal Work Queue has been a great tool as it allows Tech Support to handle all customer requests whether they are made by phone, email or web (iSupport). There are still some training issues due to high turnover in the Technical Support area but for the most part it is smooth sailing now that everyone knows and loves Oracle.

**Conclusion** – This implementation was not without its challenges and frustrations but all in all it was very successful and the extensive Oracle footprint has allowed Luminex to grow rapidly and set themselves up for a strong future.

**Appendix A: Initial System Roadmap**

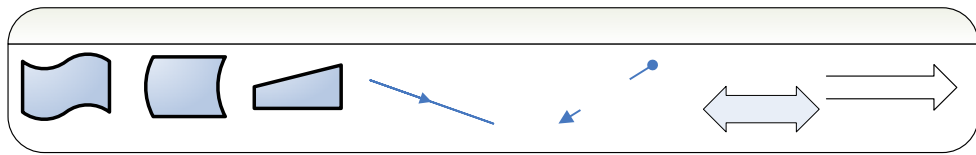
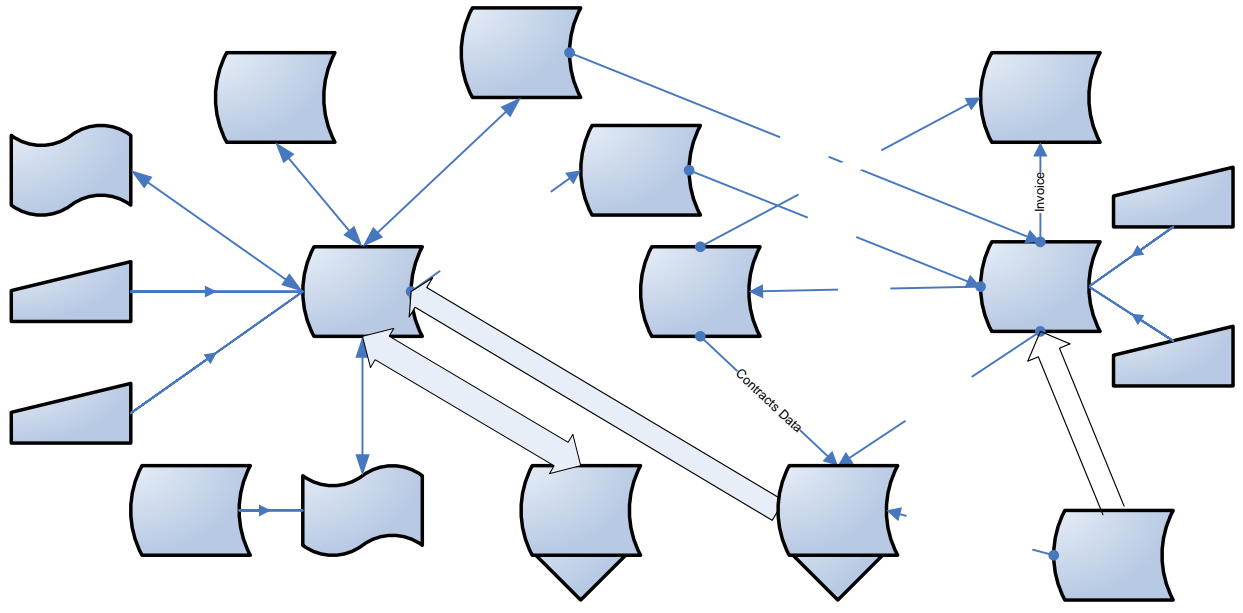


Depot PO Billing

SLA PO Billings

Oracle

**Appendix B: Oracle Service System Roadmap**



iSupport (Web)

Email (eMail Center)

Recertifications

Teles