

ORACLE FIELD SERVICE CLOUD
CONFIGURATIONS FOR
ORACLE CUSTOMER CLOUD SERVICE
INTEGRATION TO ORACLE FIELD
SERVICE CLOUD

(ALSO APPLICABLE TO ORACLE UTILITIES
CUSTOMER TO METER)

RELEASE 20B



Disclaimer

Oracle Field Service Cloud Configurations for Oracle Customer Cloud Service Integration to Oracle Field Service Cloud

July 2020

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Preface

Welcome to the Oracle Field Service Cloud Configuration Guide for Oracle Utilities Customer Cloud Service Integration with Oracle Field Service Cloud. This document focuses on the configuration and administration information of Oracle Field Service Cloud for the integration.

The preface includes the following:

- [Audience](#)
- [Documentation and Accessibility](#)
- [Abbreviations](#)

Audience

This document is intended for anyone implementing the Oracle Utilities Integration for Customer Cloud Service and Oracle Field Service Cloud.

Documentation and Accessibility

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

Access to Oracle Support

Oracle customers have access to electronic support for the hearing impaired. Visit:

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or
<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs>

Abbreviations

Term	Expanded Form
OFSC	Oracle Field Service Cloud
C2M	Oracle Utilities Customer to Meter
OIC	Oracle Integration Cloud Service
SA	Service Agreement
SP	Service Point
CCS	Customer Cloud Service

Chapter 1: Accelerator Overview

This chapter focuses on software requirements, Oracle Field Service Cloud, and provides an overview of the configuration. It includes the following:

- [Configuration Overview](#)
- [Accelerator Package](#)
- [Accelerator Activity Types](#)

Configuration Overview

This section covers basic Oracle Field Service Cloud configurations, such as Activity Types, User Types, Properties, UI screens, validations for these UIs, plugins, and resource configurations.

Accelerator Package

The accelerator package includes various user types, properties, and plugins. This document explains the configurations for other elements such as activity types, work zones, work skills, work conditions and outbound channel.

The package helps customers configure and set up Oracle Field Service Cloud used in Oracle Utilities Customer Cloud Service Integration with Oracle Field Service Cloud integration as the integration package contains only Oracle Utilities Customer Cloud Service and Oracle Integration Cloud configuration files and instructions. It is used in addition to the integration package that provides a complete end-to-end set up for the integration.

The contents of the package are:

- **User Types** – Define layouts and UI screens. The new Service Point Details, New Meter Details, and Existing Meter Details UIs are linked to user types. For more details see the [User Types](#) section.
- **Properties** – Create layouts and mapping. For more information see the [Properties](#) section.
- **Plugins** – The Device Verification and Unrelated Pickup Query (service point query) plugins are part of the package. The Device Verification plugin takes badge number and returns the device details if a corresponding device exists. The Unrelated Pickup Query plugin gets the service points based on the search criteria. For more information see the [Forms and Plugins](#) section.

Accelerator Activity Types

In this integration release, accelerator is a sample and supports only ten Activity Types. Create UIs for additional Activity Types or customize the existing UIs for the supported Activity Types. For information about customizing the UIs see the [Customization](#) chapter.

- Install Meter
- Disconnect SP Meter and Remove Meter
- Read Meter
- Exchange Meter
- Connect SP at Device (not item)
- Disconnect SP at Device and Remove Device
- Disconnect Warning
- Item Exchange
- Turn on pilot light
- Trim Tree
- Service Investigation

Chapter 2: Installing Basic Accelerator Package

This chapter focuses on importing the files that come as a part of the package and configuring them in the Oracle Field Service Cloud environment for the integration to run successfully. Make sure to follow the same sequence for successful configuration. It includes the following:

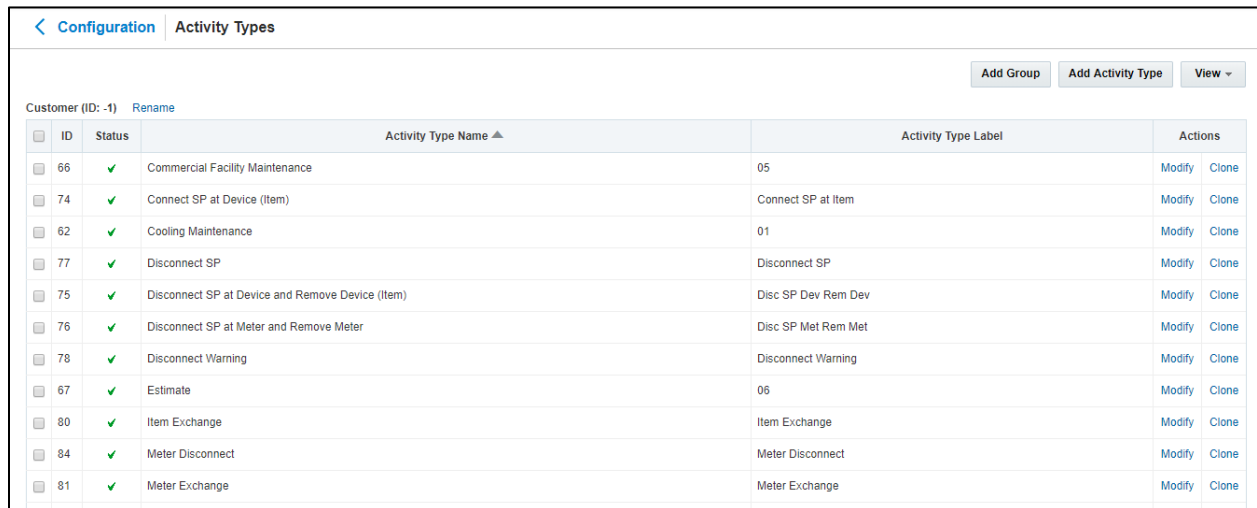
- [Activity Types](#)
- [Properties](#)
- [Forms and Plugins](#)
- [User Types](#)

Activity Types

Activity types define the categories of the activity supported by Oracle Field Service Cloud (in this case, Oracle Utilities Customer Cloud Service Integration to Oracle Field Service Cloud). In the activity type various fields, such as time slots and activity status are denoted using colors and features that each activity type supports. They can be customized for each activity type.

To create an activity type:

1. Navigate to the **Configuration** page.
2. Select **Activity Types** and click **Add Activity Type**.
3. Select **Customer** from the list.



The screenshot shows the 'Configuration' page for 'Activity Types'. At the top right, there are buttons for 'Add Group', 'Add Activity Type', and a 'View' dropdown. Below these is a table with columns: ID, Status, Activity Type Name, Activity Type Label, and Actions. The table contains 11 rows of activity types, all with a status of 'Active' (indicated by a green checkmark). The 'Actions' column for each row contains 'Modify' and 'Clone' links.

ID	Status	Activity Type Name	Activity Type Label	Actions
66	Active	Commercial Facility Maintenance	05	Modify Clone
74	Active	Connect SP at Device (Item)	Connect SP at Item	Modify Clone
62	Active	Cooling Maintenance	01	Modify Clone
77	Active	Disconnect SP	Disconnect SP	Modify Clone
75	Active	Disconnect SP at Device and Remove Device (Item)	Disc SP Dev Rem Dev	Modify Clone
76	Active	Disconnect SP at Meter and Remove Meter	Disc SP Met Rem Met	Modify Clone
78	Active	Disconnect Warning	Disconnect Warning	Modify Clone
67	Active	Estimate	06	Modify Clone
80	Active	Item Exchange	Item Exchange	Modify Clone
84	Active	Meter Disconnect	Meter Disconnect	Modify Clone
81	Active	Meter Exchange	Meter Exchange	Modify Clone

If it does not exist, create the group.

- a. Click **Add Group**.



- b. Enter the group name. Example: Customer
4. Click **Add Activity Type**.
5. Enter the name and other activity type details. Click **Add**.

Activity type info		Features	
* Label	<input type="text" value="Disconnect Warning"/>	<input type="checkbox"/> Teamwork	
* Name		<input type="checkbox"/> Multi-day activity	
* English	<input type="text" value="Disconnect Warning"/>	<input checked="" type="checkbox"/> Allow move between resources	
SpanishLA	<input type="text"/>	<input checked="" type="checkbox"/> Allow creation in buckets	
Portuguese (Brazil)	<input type="text"/>	<input checked="" type="checkbox"/> Allow reschedule	
Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Support of not-ordered activities	
Group	<input type="text" value="Customer"/>	<input checked="" type="checkbox"/> Allow non-scheduled	
* Default Duration	<input type="text" value="48"/> minutes	<input checked="" type="checkbox"/> Support of work zones	
Color scheme		<input checked="" type="checkbox"/> Support of work skills	
Copy from	<input type="text"/>	<input checked="" type="checkbox"/> Support of time slots	
Pending	<input type="text" value="FFDE00"/>	<input checked="" type="checkbox"/> Support of inventory	
Completed	<input type="text" value="79B6EB"/>	<input checked="" type="checkbox"/> Support of links	
Warning	<input type="text" value="FFAAAA"/>	<input checked="" type="checkbox"/> Support of preferred resources	
		<input type="checkbox"/> Allow mass activities	
		<input type="checkbox"/> Allow Repeating Activities	
		<input checked="" type="checkbox"/> Calculate travel	

Suspended	<input type="text" value="99FFFF"/>	<input checked="" type="checkbox"/> Calculate activity duration using statistics
Not Done	<input type="text" value="60CECE"/>	<input checked="" type="checkbox"/> Allow to search
Not Ordered	<input type="text" value="FFCC99"/>	<input checked="" type="checkbox"/> Allow to create from Incoming interface
Started	<input type="text" value="5DBE3F"/>	<input type="checkbox"/> Enable 'day before' trigger
Cancelled	<input type="text" value="80FF80"/>	<input type="checkbox"/> Enable 'reminder' and 'change' triggers
		<input type="checkbox"/> Enable 'not started' trigger
		<input type="checkbox"/> Enable 'SW warning' trigger
<input type="checkbox"/> Available time slots		<input checked="" type="checkbox"/> Calculate delivery window
<input checked="" type="checkbox"/> 08-10 (08:00 AM - 10:00 AM)		<input checked="" type="checkbox"/> SLA and Service window use customer time zone (required for routing)
<input checked="" type="checkbox"/> 10-12 (10:00 AM - 12:00 PM)		<input checked="" type="checkbox"/> Support of required inventory
<input checked="" type="checkbox"/> 13-15 (01:00 PM - 03:00 PM)		
<input checked="" type="checkbox"/> 15-17 (03:00 PM - 05:00 PM)		
<input checked="" type="checkbox"/> All-Day (All-day time slot)		
<input checked="" type="checkbox"/> Lunch break (12:00 PM - 12:30 PM)		

- For other Activity Types listed (Install Meter, Disconnect SP Meter and Remove Meter, Meter Read, Meter Exchange, Connect SP at Item, Disconnect SP Device and Remove Device, Disconnect Warning, Item Exchange, Service Investigation, Turn on Pilot Light and Trim Tree), clone and modify the name and details as required.

Note: Make sure the label names are exactly the same as given below. Else, the new name should be updated in the activity type lookup of Oracle Integration for Cloud.

- Make sure to have corresponding lookup values in SOMOFSC_ActivityType lookup for all activity types in Oracle Integration for Cloud.

For example: D1-InstallMeter (SOM Task Type) corresponding to Meter Install (OFSC Activity Type)

- Add only those Activity Types that are needed and specific to the customers.

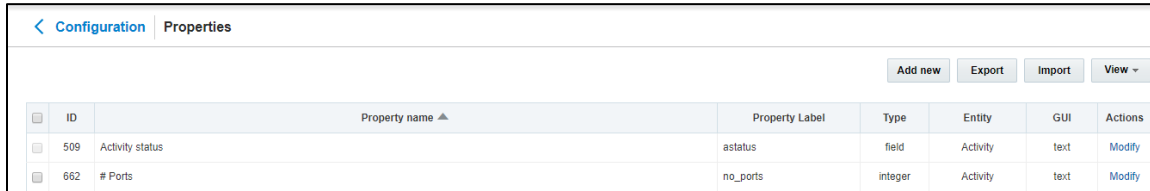
Activity Type Name	Activity Type Label
Turn on Pilot light	Turn on Pilot light
Service Investigation	Service Investigation
Trim Tree	Trim Tree
Disconnect SP at Device and Remove Device (Item)	Disc SP Dev Rem Dev
Item Exchange	Item Exchange
Connect SP at Item	Connect SP at Item
Meter Exchange	Meter Exchange
Meter Read	Meter Read
Disconnect SP at Meter and Remove Meter	Disc SP Met Rem Met
Connect SP	Connect SP
Meter Install	Meter Install
Disconnect Warning	Disconnect Warning

Properties

Properties are custom fields used to enable the Utility Integration specific UIs created and are used to map the Oracle Field Service Cloud UIs. Each property is classified into types (such as field, integer, enumeration and string) based on the requirements. They should be addressed using this property.

To import the property file that is a part of the accelerator package:

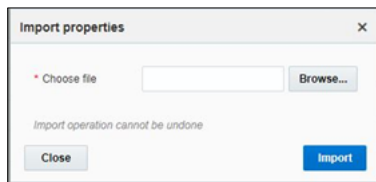
1. Navigate to the **Configuration** page.
2. Click the **Properties** icon and click **Import**.



The screenshot shows the 'Configuration Properties' page. At the top, there are buttons for 'Add new', 'Export', 'Import', and 'View'. Below these is a table with the following data:

ID	Property name	Property Label	Type	Entity	GUI	Actions
509	Activity status	astatus	field	Activity	text	Modify
662	# Ports	no_ports	integer	Activity	text	Modify

3. Browse to select the file to be imported. Click **Import**.



4. Verify the successful import of the file. Click **Close**.



Forms and Plugins

The plugins are used to make changes to screen and data, based on their type and status of target and parent object. They invoke the response for badge number input from Oracle Utilities Customer Cloud Service in the device verification plugin and retrieve the service points from Oracle Utilities Customer Cloud Service based on the search criteria by the crew in Oracle Field Service Cloud to create unrelated pickup activity using unrelated pickup activity plugin.

The Device Verification plugin accepts badge number of the device and in response sends various parameters from Oracle Utilities Customer Cloud Service, such as unit of meter, time of use, read sequence, dials, and decimals after verifying the badge number in the Oracle Utilities Customer Cloud Service environment.

Crew populates the search criteria in the Unrelated Pickup Activity. The plugin fetches service points from Oracle Utilities Customer Cloud Service and displays this information in Oracle Field Service Cloud, crew can select the service point that needs to create an unrelated pickup activity.

Device Verification Plugin

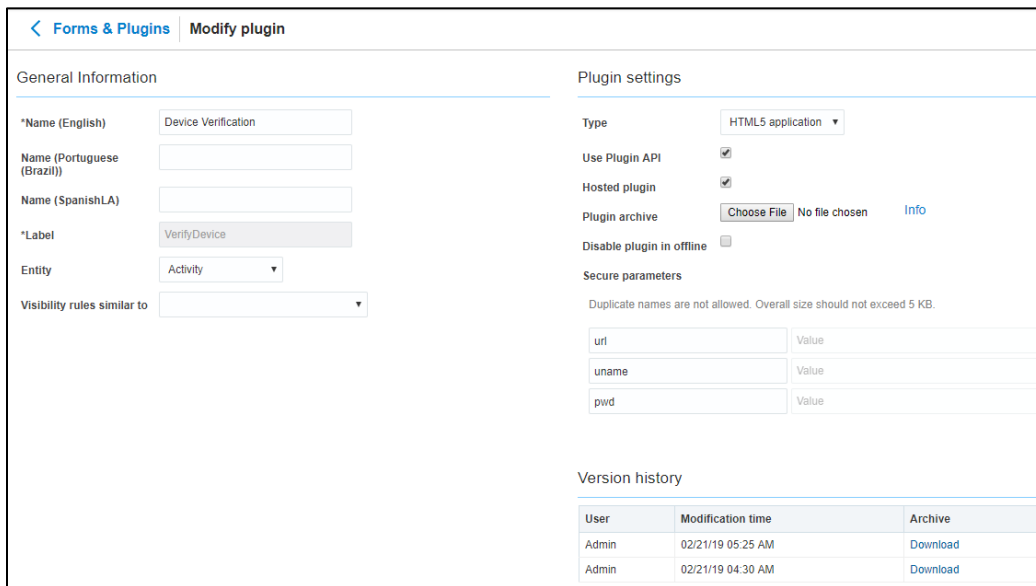
To configure a Device Verification plugin:

1. Navigate to **Configuration > Forms and Plugins**.
2. Click the **Import** icon to import the Device Verification plugin provided in the package.



Configuration Forms & Plugins		Add Form		Add Plugin		Export Plugins		Import Plugins		View	
	Test Form test_form1	Size: 1.41 KB	Created: 02/19/19 07:58 AM	Updated: 02/19/19 08:01 AM	User: Admin	2	Configured links				
	Hit EQ mobile_inventory_request#2#	Size: 0.93 KB	Created: 02/07/19 01:30 AM	Updated: 02/07/19 01:30 AM	User:	6	Configured links				
	Send Request mobile_provider_request#4#	Size: 0.97 KB	Created: 02/07/19 01:30 AM	Updated: 02/07/19 01:30 AM	User:	3	Configured links				

3. In the **Plugin Settings** pane, do the following:
 - a. Enter the OIC username and password.
 - b. Select **VerifyDevice** in plugin XML file.
 - c. Select "HTML5" from the **Type** drop-down list.



Forms & Plugins | Modify plugin

General Information

*Name (English): Device Verification

Name (Portuguese (Brazil)):

Name (SpanishLA):

*Label: VerifyDevice

Entity: Activity

Visibility rules similar to:

Plugin settings

Type: HTML5 application

Use Plugin API:

Hosted plugin:

Plugin archive: No file chosen [Info](#)

Disable plugin in offline:

Secure parameters

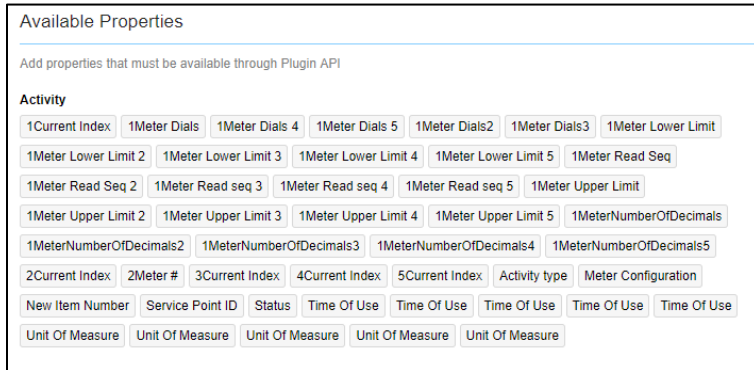
Duplicate names are not allowed. Overall size should not exceed 5 KB.

url	<input type="text"/>	Value
uname	<input type="text"/>	Value
pwd	<input type="text"/>	Value

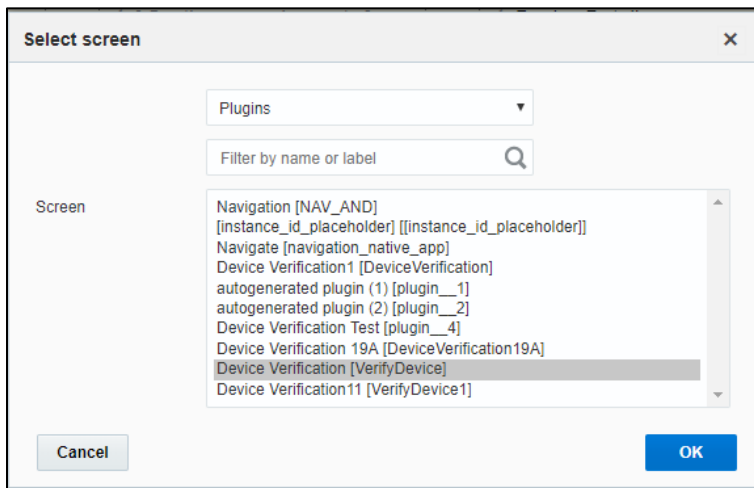
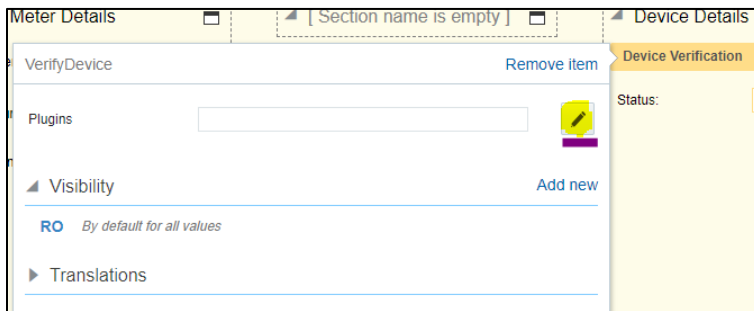
Version history

User	Modification time	Archive
Admin	02/21/19 05:25 AM	Download
Admin	02/21/19 04:30 AM	Download

- d. Make sure the **Available Properties** tab is populated with all the properties shown below.



- e. Click **Device Verification** to configure the plugin.
- f. On the **User Type** screen configurations, select **Device Verification** to connect it to the specific field on the UI in the **Mobility** page.



Until the previous release, crew could verify the existence of a device using the Device Verification feature where the search was based only on Badge Number. Also, the crew had to enter Manufacturer and Model details manually. In this release, Serial Number is included as one of the search criteria along with Badge Number. Manufacturer and Model are part of Device Verification response from Oracle Utilities Customer Cloud Service and gets auto-populated in the respective fields.

To use this feature:

- a. Select **Install Meter Activity > New Meter Details**.
- b. Click **Verify Device** to view the existence of the device.

The screenshot shows a web form with two main sections. The top section, 'Service Point Details', contains the following fields: Service Point ID (709687316702), Service Point Type (CCS-OFSC Service Point Type), Premise Type (Single family home), Service Type (Electric Service 3), Life Support (None), Device Location (In Garage), Device Location Details (device in garage), Warnings (Bad dog), Instructions (Check Seal), and Instruction Details (Details to check seal). The bottom section, 'New Meter Details', contains: Manual Entry (radio buttons for No and Yes, with 'No' selected), Badge Number (text input), Configuration Type (dropdown), Meter Location (dropdown), and Manufacturer (dropdown). A red rectangular box highlights the 'Verify Device' button in the 'New Meter Details' section.

The **Device Details** page displays both Badge Number (mandatory) Serial Number (optional).

The screenshot shows a 'Device Details' form. At the top, 'Device Type' is set to 'Meter'. Below this are two input fields: 'Badge Number' and 'Serial Number'. At the bottom right of the form are two buttons: 'Dismiss' and 'Submit'.

If the device exists based on the search criteria, the **New Meter Details** page is displayed with autopopulated details including the register information sent by Oracle Utilities Customer Cloud Service.

New Meter Details

Verify Device

Manual Entry: No
 Yes

Badge Number:

Status: Verification Successful

Configuration Type:

Meter Location:

Manufacturer:

Model:

Status Left*:

Unrelated Pickup Activity

To configure an unrelated pickup activity:

1. On the **Configuration** page, navigate to **Forms & Plugins**.
2. Click the **Import** icon to import the **Unrelated Pickup** plugin provided in the package.

< Configuration | Forms & Plugins View ▾ Add Form Add Plugin Export Plugins Import Plugins

 Unrelated Pickup UnrelatedPickup	Type: Hosted plugin Name: UnrelatedPickup	2 Configured links	☰
---	--	------------------------------	---

3. Select the unrelated pickup plugin and enter the following details:
 - a. oic_int_url– Oracle Integration Cloud integration point URL for service point query

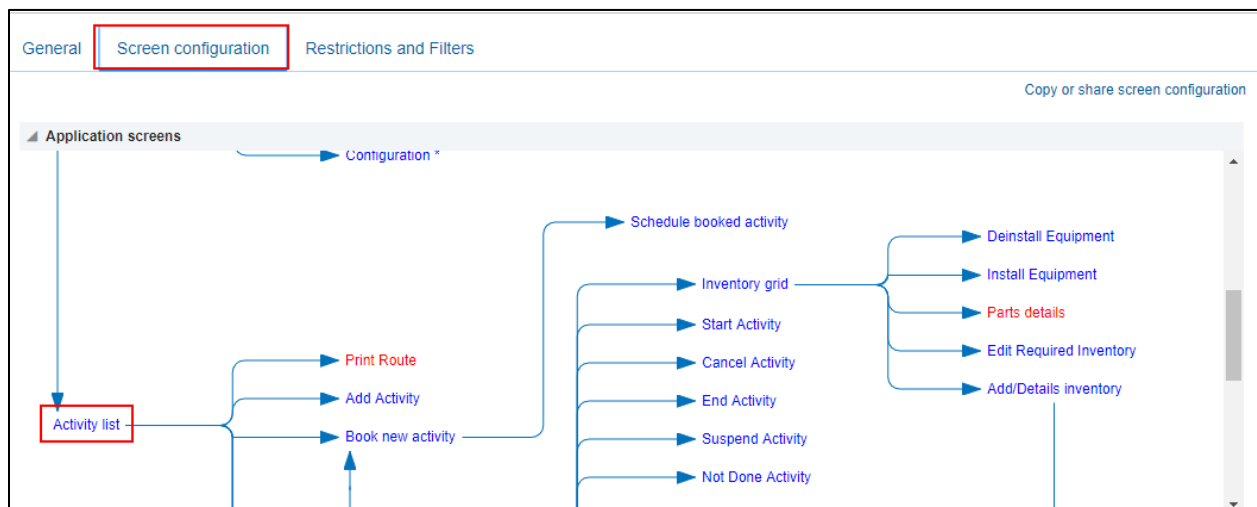
 Example:
 https://oichost/ic/api/integration/v1/flows/rest/QUERY_SERVICEPOINT_OFSCITOSOM/1.0/
 - b. oic_username and oic_password – Oracle Integration Cloud username and password
 - c. ofsc_username and ofsc_password – Oracle Field Service Cloud user name and password in the format of username@ofscinstanceid/password

Note: Username and password would be the client ID and client secret which can be retrieved from Oracle Field Service Cloud application.

< Forms & Plugins | Modify plugin

General Information	Plugin settings															
*Name (English) <input type="text" value="Unrelated Pickup"/>	Type <input type="text" value="HTML5 application"/>															
Name (Portuguese (Brazil)) <input type="text"/>	Use Plugin API <input checked="" type="checkbox"/>															
Name (SpanishLA) <input type="text"/>	Hosted plugin <input checked="" type="checkbox"/>															
*Label <input type="text" value="UnrelatedPickup"/>	Plugin archive <input type="button" value="Browse..."/> No file selected. Info															
Entity <input type="text" value="Activity"/>	Disable plugin in offline <input type="checkbox"/>															
Visibility rules similar to <input type="text"/>	Secure parameters															
	Duplicate names are not allowed. Overall size should not exceed 5 KB.															
	<table border="1"> <tr><td>oic_int_url</td><td><input type="text" value="Value"/></td><td><input type="button" value="-"/></td></tr> <tr><td>oic_username</td><td><input type="text" value="Value"/></td><td><input type="button" value="-"/></td></tr> <tr><td>oic_password</td><td><input type="text" value="Value"/></td><td><input type="button" value="-"/></td></tr> <tr><td>ofsc_username</td><td><input type="text" value="Value"/></td><td><input type="button" value="-"/></td></tr> <tr><td>ofsc_password</td><td><input type="text" value="Value"/></td><td><input type="button" value="-"/></td></tr> </table>	oic_int_url	<input type="text" value="Value"/>	<input type="button" value="-"/>	oic_username	<input type="text" value="Value"/>	<input type="button" value="-"/>	oic_password	<input type="text" value="Value"/>	<input type="button" value="-"/>	ofsc_username	<input type="text" value="Value"/>	<input type="button" value="-"/>	ofsc_password	<input type="text" value="Value"/>	<input type="button" value="-"/>
oic_int_url	<input type="text" value="Value"/>	<input type="button" value="-"/>														
oic_username	<input type="text" value="Value"/>	<input type="button" value="-"/>														
oic_password	<input type="text" value="Value"/>	<input type="button" value="-"/>														
ofsc_username	<input type="text" value="Value"/>	<input type="button" value="-"/>														
ofsc_password	<input type="text" value="Value"/>	<input type="button" value="-"/>														

4. Click **Configuration** and select the user type.
5. Navigate to the **Screen Configuration** tab.



6. Click **Application screens** to display the structure. Click **Activity list**.
7. On the left pane, click **Click to add** and select the unrelated plugin.

Add button [X]

Screen type: Standard action screen, Plugins, Custom forms

Text input: unr

Available: Unrelated Pickup, UnrelatedPickup

Selected: Add before selected

Buttons: Close, OK

8. On the right pane, add new visibility.

Name: English, SpanishLA, Portuguese (Brazil)

Original name: Unrelated Pickup

Plugin label: UnrelatedPickup

Buttons: Save name, Use original name

[Unrelated Pickup] visibility

	Access	Conditions	Action
<input type="checkbox"/>	Read-only	*	Modify

9. Make sure the **Available Properties** tab displays all the properties as shown in the figure below.

Available Properties

Add properties that must be available through Plugin API [Edit]

Activity

- Activity Notes
- Activity type
- Address
- City
- Service Point ID
- Service Point Source Status Code
- Service Point Source Status Description
- Service Point Status Code
- Service Point Status Description
- Service Point Type
- Service Point Type Description
- State
- ZIP/Postal Code

10. After the plugin is configured, select the XML file in the **User Type Screen Configurations** field to connect it to the specific field on the UI in the **Mobility** page.

11. CORS Setup

As part of the unrelated pick up functionality, from the plugin, there is an invocation call to OFSC REST API which needs CORS setup. To call OFSC REST API from the plugin, set up cross-origin resource sharing (CORS) in Oracle Field Service Cloud as follows:

- Navigate to **Configuration > Application > Additional restrictions**.
- Select **Allow Cross-origin resource sharing (CORS)** from the following web domains and provide the Oracle Field Service Cloud domain.

- c. If the domain details are unknown, enter '*'. For the actual Oracle Field Service Cloud domain contact the Oracle Field Service Cloud support team.

Additional restrictions

Allow access only to certain resources

Allow access only for certain IP-addresses

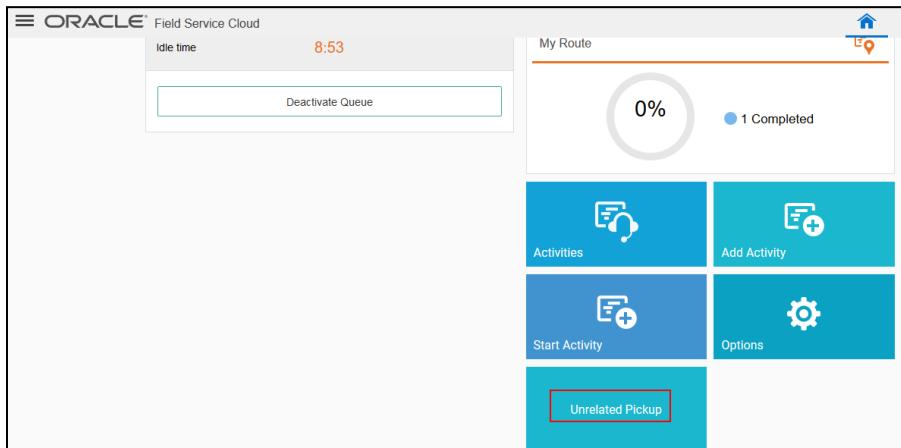
Allow Cross-origin resource sharing (CORS) from the following web domains

*Each line should contain one domain name.
Example:
https://www.example.com
https://best.customer.com
https://bestcust.com*

*

In this integration release, crew can specify search criteria and send request to Oracle Utilities Customer Cloud Service for service points. From the retrieved service points, crew can select a service point and raise a service investigation activity. The search criteria includes address, city, postal code, latitude, and longitude.

1. On the **Mobility** page, select **Unrelated Pickup** to use this feature.



2. On the **Unrelated Pickup** page search for service points.

Unrelated Pickup

Search for Service Point

Street Address

City

Postal Code

Latitude

Longitude

List of Service Points

Search for Service Point

Street Address: 404
 City: stark
 Postal Code: Enter PostalCode
 Latitude: Provide Latitude. Range: +/- 0.000000 to 90.000000
 Longitude: Provide Longitude. Range: +/- 0.000000 to 180.000000

Search

List of Service Points

Select	Address	Service Point Type	SP Source Status
<input type="radio"/>	404, Not Found Drive, Error Road, Stark, OH	Generic Electric Meter	Connected
<input checked="" type="radio"/>	404, Not Found Drive, Error Road, Stark, OH	Electric Residential	Connected

Select

3. Select the desired service point from the list and click **Select**.
4. Click **Add Activity** to create the activity.

After successful creation of the activity in Oracle Field Service Cloud, the corresponding activity is created in Oracle Utilities Customer Cloud Service.

Add Activity

Activity Type: Service Investigation

Address: 404, Not Found Drive, Error Road
 City: Stark
 State: OH
 Country: US
 Postal Code: 44720
 Service Point Type: Electric Residential
 Service Point ID: 618303598544
 Activity Notes:

Activity has been created successfully. OFSC Activity ID: 4224311

User Types

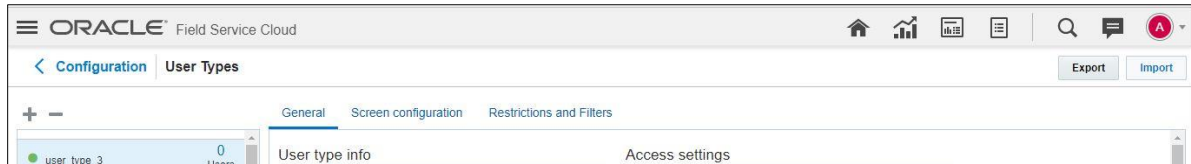
User types manage all user permissions. Each user type has a profile that defines security and display permissions, such as the user's login method, the ability to use certain functions, and access to menu items and properties. Screen-configuration settings define the screens, windows, pop-up windows and other elements visible to a certain user type. They also support the context layout editor, in which the content, arrangement, and visibilities of each context are set.

Use the **Screen Configuration** settings in specific user types to create custom screen context layouts for the integration.

Prerequisite! Make sure the Properties, Activity Types, and Plugins are loaded before proceeding.

To configure the user types:

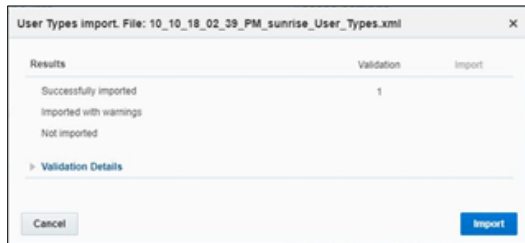
1. Navigate to the **Configuration** page.
2. Click the **User Types** icon.
3. Click **Import** to import the user types.



4. On the **Choose file** field, click **Browse** to select the user type. Click **Validate**.



5. After successful validation, click **Import** to import the file.



6. Verify the successful import and click **Close**.



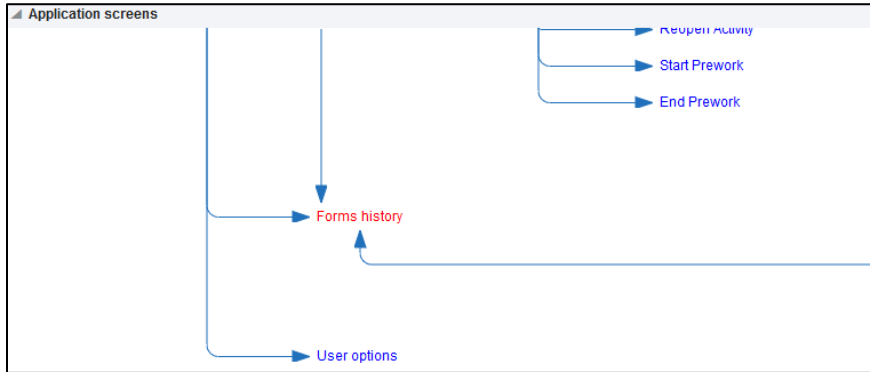
Configuring Time Format

The time format can be changed from 12 hour to 24 hour. Oracle Fields Service Cloud has the provision to configure in the user type file. The user type file is in 12 hour format by default.

To change the time format:

1. Login to Oracle Field Service Cloud.
2. Navigate to **Configuration > User type > C2M OFSC**.

3. Click **Screen Configuration** and select **User options**.



4. Click **Property** and click the value in the **Value visibility** section.

The screenshot shows the "Property" configuration window for the field "sutime_fid". The left pane contains various configuration options like "Time Format", "Date Format", "Mobile Activity Count", "Mobile Inventory Co...", and "Design Theme". The right pane shows the field details: "User field" is "Time Format [sutime_fid]", "Type" is "Combobox", and there are sections for "Name translations", "Visibility" (with "RW By default for all values"), and "Value visibility" (with "12-hour").

The screenshot shows the "Value Visibility Settings" dialog box. It has a "Values" section with a "Select values" dropdown menu. The dropdown is open, showing two options: "12-hour" and "24-hour", both with checkboxes. There is a "+" button on the right side of the dialog box. At the bottom, there is a link that says "Show conditions as formula".

5. Click **Save**.

Chapter 3: Additional OFSC Configurations

This chapter elaborates on the additional configuration of organization, work zones, outbound channels, and UI validations in user types. It includes the following:

- [Checklist](#)
- [Organization](#)
- [Work Zones](#)
- [Work Skills](#)
- [Activities and Scheduling Information](#)
- [Resource and Bucket Info](#)
- [Outbound Channel](#)
- [UI Validations](#)
- [Quota](#)

Checklist

Before getting started with Oracle Field Service Cloud configuration, verify that the following are complete.

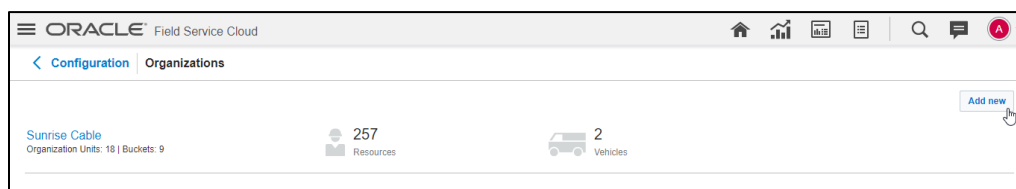
- All the Activity Types specific to customer are created
- Properties are imported
- Users and resources are configured
- User Types are imported
- Make sure the Quota has been allocated and doesn't need to be configured
- Plugin has been imported
- Name of Organization
- Work Skills to be created
- Name of the resources, work zones
- Details of Oracle Integration Cloud to create the Outbound Channel

Organization

An Organization can have buckets, organization units (Org Units), field resources, tools or vehicle associations. Create an organization before adding any type of resource.

To create an organization before adding any type of resource:

1. Navigate to **Configuration > Organization**.
2. Click **Add New** to add a new Organization.



3. Enter the name of the Organization and click **Submit**.

Work Zones

Work zones are used to divide area in different zones for better scheduling of crews. Use the work zone keys to provide the ZIP/postal code to facilitate the division through the Service Point information that comes from Oracle Utilities Customer Cloud Service.

To configure a work zone:

1. Navigate to the **Configuration** page and click **Work Zone**.
2. Make sure the **Work Zone Key** (top-left corner) is ZIP/Postal Code.

ID	Status	Work zone name	Work Zone Keys	Actions	Shapes
10	✓	WINTER SPRINGS	32708	Modify	Shape
13	✓	STARK	44720	Modify	

3. On the **Work Zones** page, click **Add new** to add the required postal codes in the **Work Zone Keys** field.

4. Click **Add** to save the new work zone.

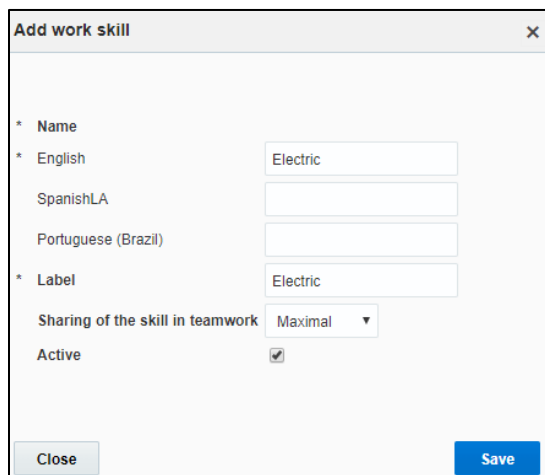
Work Skills

Use the work skills to assign activities to workers. Incoming activities are also assigned work skills based on certain conditions being met, and are attached to resources with corresponding skills during routing.

The integration supports only two work skills at this time of release: Meter Services, Ops and Maintenance.

To create work skills:

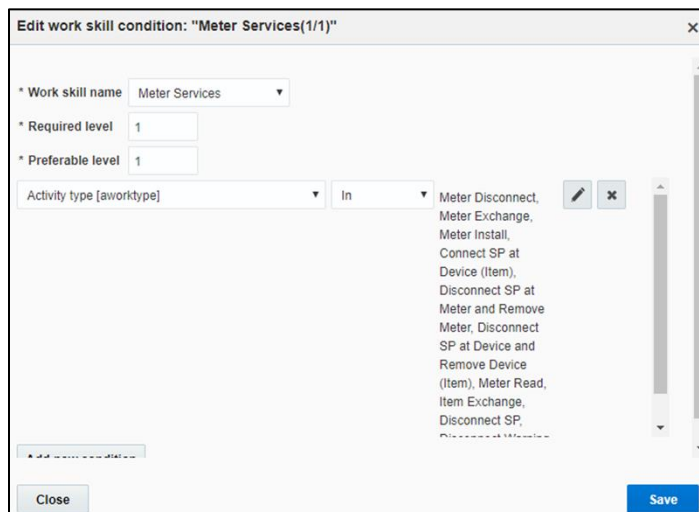
1. Navigate to **Configuration > Work Skills**.
2. Click **Add New**.
3. Enter the details of the work skill. Add two work skills: *Meter Services and Ops and Maintenance*
Click **Save**.



The screenshot shows a dialog box titled "Add work skill" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Name**: A required field, currently empty.
- English**: A text input field containing the value "Electric".
- SpanishLA**: An empty text input field.
- Portuguese (Brazil)**: An empty text input field.
- Label**: A text input field containing the value "Electric".
- Sharing of the skill in teamwork**: A dropdown menu set to "Maximal".
- Active**: A checkbox that is checked.
- Buttons: "Close" (grey) and "Save" (blue) at the bottom.

4. Click **Work Skill Condition**. Make sure "Meter Services" is listed and configured with respective details.
The figure below shows the necessary values.



The screenshot shows a dialog box titled "Edit work skill condition: 'Meter Services(1/1)'" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Work skill name**: A dropdown menu set to "Meter Services".
- Required level**: A text input field containing the value "1".
- Preferable level**: A text input field containing the value "1".
- Activity type [aworktype]**: A dropdown menu.
- In**: A dropdown menu.
- Activity List**: A scrollable list of activities including: "Meter Disconnect, Meter Exchange, Meter Install, Connect SP at Device (Item), Disconnect SP at Meter and Remove Meter, Disconnect SP at Device and Remove Device (Item), Meter Read, Item Exchange, Disconnect SP, Disconnect Meter".
- Buttons: "Close" (grey) and "Save" (blue) at the bottom.

Activities and Scheduling Information

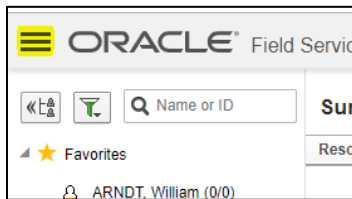
By default, the activities created from Oracle Utilities Customer Cloud Service to Oracle Field Service Cloud remain in 'non scheduled' state as expected. To schedule them refer to the Oracle Field Service Cloud documentation and use the routing option that suits the business need.

Resource and Bucket Information

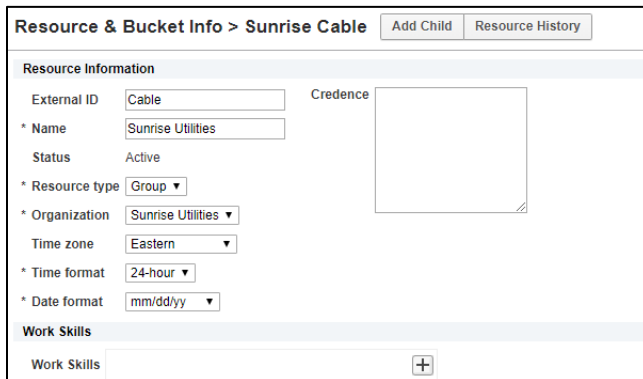
Oracle Field Service Cloud uses bucket and resources to categorize the resources. In this integration, use the bucket as a resource type to route the entire meter service tasks to workers. In the bucket, create two resources (field workers) who are assigned field activities coming from Oracle Utilities Customer Cloud Service.

To configure resource and bucket information:

1. On the Oracle Field Service Cloud Home page, click the three lines on the top left corner.



2. Click **Resource & Bucket Info** and click **Add Child**.

A screenshot of the 'Resource & Bucket Info' form for 'Sunrise Cable'. The form has a title bar with 'Resource & Bucket Info > Sunrise Cable' and two buttons: 'Add Child' and 'Resource History'. The form is divided into two sections: 'Resource Information' and 'Work Skills'. The 'Resource Information' section contains the following fields: 'External ID' (Cable), 'Name' (Sunrise Utilities), 'Status' (Active), 'Resource type' (Group), 'Organization' (Sunrise Utilities), 'Time zone' (Eastern), 'Time format' (24-hour), and 'Date format' (mm/dd/yy). There is also a 'Credence' field with a large empty box. The 'Work Skills' section has a 'Work Skills' field with a plus sign button.

3. Select **Bucket** to add a new bucket in the **Resource type**.
4. Enter the required details and click **OK**.
5. Click **Add Child** and select **Technician** from the **Resource type** drop-down list. Click **OK**.

9. Select the required work skills to this Technician. Click **Save**.

Outbound Channel

This element is used to create a channel to communicate with Oracle Utilities Customer Cloud Service through Oracle Integration Cloud. Various channel types can be chosen, but since Oracle Utilities Customer Cloud Service integration to Oracle Field Service Cloud is through Oracle Integration Cloud, it is used as the channel type.

To configure an outbound channel:

1. Navigate to the **Configuration** page and click the **Outbound Integration** icon.
2. Click **Add Channel**. Enter the required details and click **OK**.

Offline Vs Online Mode

When the crew is enroute to perform an activity in the field there are chances that the location might not have network (offline mode). In such scenarios crew cannot fetch device information and cannot send a request for device verification. To overcome this crew should manually do the entry and select appropriate configuration type which auto populates all the registers information.

Offline Mode Configurations

Since different customers have different configurations to auto populate the registers information, do the following:

1. Login to Oracle Field Service Cloud.
2. Navigate to **Visual Form Editor > C2M OFSC > Edit/View activity**.
3. Click **Unit Of Measure** and expand the **Default value and validation** section.

The default value code is displayed as:

```
if(activity.c2m_new_meter_type= ('INT-OFSC-DC-MANUALMTR1'), 2,0 ) OR
if(activity.c2m_new_meter_type= ('INT-OFSC-DC-MANUALMTR2'), 2,0 )
```

In the above code, `if(activity.c2m_new_meter_type= ('INT-OFSC-DC-MANUALMTR1'), 2,0)` tells Oracle Field Service Cloud that if the meter type is 'INT-OFSC-DC-MANUALMTR1' the UOM value is 2; else it is 0.

4. To identify the meaning of 2, open the respective property and view the index.
For example: 2 in the above code represents KWH.

Note: Values in the property of type enumeration can be extended and can have values in the index based on the requirement. For example: KWH can have a KWH index.

The screenshot shows the 'Modify Property' dialog box. The 'Enumeration values' section is expanded, showing a list of values. The value 'KWH[2]' is highlighted with a red box. The 'Active' checkbox is checked.

5. Follow step 4 for viewing the TOU, SQI, Dials, Decimals values for all registers.

Note that no configurations are required for online mode.

To perform the offline operations:

1. Login to the mobile application.
2. From the activities assigned to the crew, select **Install Meter**.
3. Select **Meter Details** to enter the information.

If the device is offline, crew should select **Manual Entry** as **Yes** and select the configuration type.

Service Point Details

Service Point ID: 709687316702
 Service Point Type: CCS-OFSC Service Point Type
 Premise Type: Single family home
 Service Type: Electric Service
 Life Support: None

Device Location:

Device Location Details:

Warnings:

Instructions:

Instruction Details:

Meter Information

New Meter Details

Manual Entry: No Yes

Badge Number:

Configuration Type:

Meter Location:

- After the respective fields are selected based on pre-configuration the registers information is displayed as below. Click **Submit**.

Service Point Details

Service Point ID: 016352720152
 Warnings:

Instructions:

Instruction Details:

Life Support: None

Meter Information

New Meter Details

Manual Entry: No Yes

Badge Number:

Configuration Type: Default Single Register

Meter Location:

Manufacturer:

Model:

Status Left*:

Registers Information

New Meter Reading Details

Read Sequence: 1
 Unit Of Measure: KWH
 Time Of Usage: ON
 SQT: PEAK
 Dials: 5
 Decimals: 2
 Reading*:

Meter Read Override

This functionality is applicable in online mode only. Based on the type of activity crew enters the meter readings. The readings should be between the high/low boundaries received by Oracle Field Service Cloud from Oracle Utilities Customer Cloud Service after device verification. If the reading is outside of these limits, Oracle Field Service Cloud displays corresponding error messages. If the meter reading is actually outside the limits, select to override the readings and submit them.

To override meter read:

- Login to mobile application.
- From the activities assigned to crew select the required activity.
- Select **Meter Details** and navigate to the user interface.

Service Point Details		Registers Information	
Service Point ID:	709687316702	New Meter Reading Details	
Service Point Status:	Connected	Read Sequence:	1
Service Point Type:	CCS-OFSC Service Point Type	Unit Of Measure:	KWH
Premise Type:	Single family home	Time Of Usage:	Peak
Service Type:	Electric Service	SQI:	PEAK
Life Support:	None	Dials:	8
Device Location:	In Garage	Decimals:	3
Device Location Details:	device in garage	Reading*:	<input type="text"/>
Warnings:	Bad dog	Override Reading:	<input checked="" type="radio"/> No <input type="radio"/> Yes
Instructions:	Check Seal	Lower Limit:	0
Instruction Details :	Details to check seal	Upper Limit:	28.00

The lower and upper limit are part of message from Oracle Utilities Customer Cloud Service. It infers that reading should be ideally between these limits but a crew can always override the recommendations. If the reading is not between these limits the application displays an error.

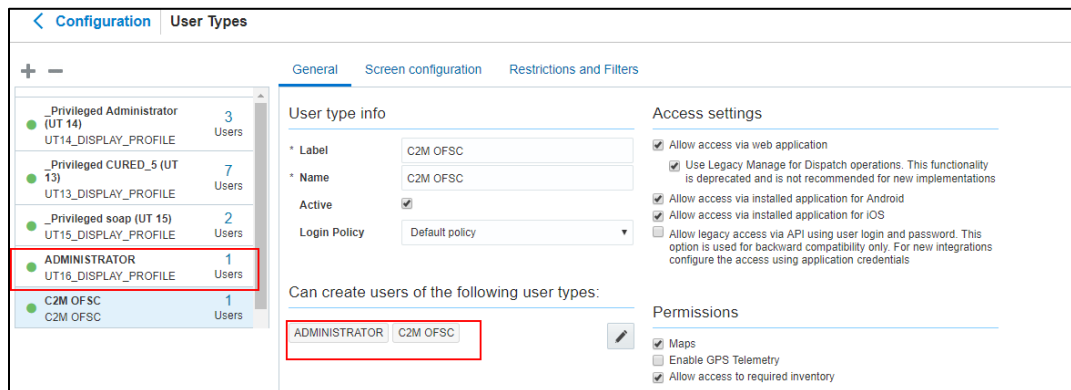
Service Point Details		Registers Information	
Service Point ID:	618303598544	Reading Details	
Warnings:	<input type="text"/>	Read Sequence:	0
Instructions:	<input type="text"/>	Unit Of Measure:	KWH
Instruction Details :	<input type="text"/>	Dials:	7
Life Support:	None	Decimals:	2
Meter Information		Reading*:	30
Existing Meter Details		<small>Please double check and select override reading if needed</small>	
Manufacturer:	Accumeter	Override Reading:	<input checked="" type="radio"/> No <input type="radio"/> Yes
Model:	IND1300	Lower Limit:	0
Status Found*:	<input type="text"/>	Upper Limit:	28.00

4. To submit the reading, select **Override Reading** as **Yes** and click **Submit**.

Service Point Details		Registers Information	
Service Point ID:	709687316702	New Meter Reading Details	
Service Point Status:	Connected	Read Sequence:	1
Service Point Type:	CCS-OFSC Service Point Type	Unit Of Measure:	KWH
Premise Type:	Single family home	Time Of Usage:	Peak
Service Type:	Electric Service	SQI:	PEAK
Life Support:	None	Dials:	8
Device Location:	In Garage	Decimals:	3
Device Location Details:	device in garage	Reading*:	<input type="text"/>
Warnings:	Bad dog	Override Reading:	<input type="radio"/> No <input checked="" type="radio"/> Yes
Instructions:	Check Seal	Lower Limit:	0
Instruction Details :	Details to check seal	Upper Limit:	0

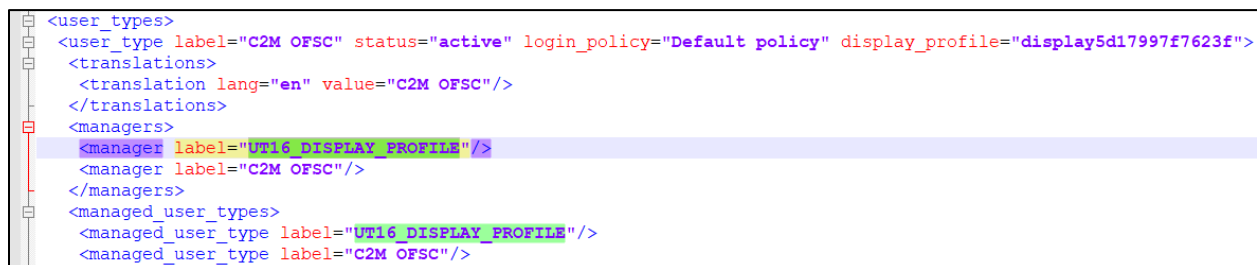
Display Profile

This section is applicable to users with display profile other than “UT16_DISPLAY_PROFILE”.



To change the display profile:

1. Open the usertype.xml file.
2. Search for “manger” and change the label based on the Oracle Field Service Cloud configuration.
3. Make sure to change the “managed_user_type” label.



Quota Configuration

Oracle Field Service Cloud Capacity allows to achieve an optimal resource utilization. Use this feature to plan the resource capacity in advance, forecast the resource allocation, and identify where the quota is under utilized or over utilized.

Capacity Management: Manages the volume of workforce. Capacity ensures that there are enough qualified resources to implement the expected amount and type of work.

Quota Management: Allocates work across the shifts and time slots for the available field resources.

In Oracle Field Service Cloud, quota and capacity can be managed in the capacity management matrix. The quota matrix is generated with real-time data based on the requirements. Update quota values to the business needs using either time-slot based or time-interval based (availability-based) quota management.

The capacity components are described below:

- **Work Skills:** A client-specific set of skills assigned to the resources to determine their skill sets and the qualification level within each skill set.
- **Work Skill Conditions:** A set of rules defined to assign required work skills and work skill levels to the activities.
- **Capacity Categories:** A group of activities with similar work skill requirements. These are used for the quota management purpose.
- **Time Slots:** The amount of quota reserved for a capacity category at a specific time of the day. Time slots are associated with the buckets and individual capacity categories used to manage the capacity management grid. They are also used to manage the activities.
- **Time Intervals:** Define the configured time intervals for booking activities. This value is used to show available capacity, max available resources, and the value for Booking Status time intervals.

For steps to create Work Skills and Work Skill Conditions, see the [Work Skills](#) section.

Creating Capacity Categories

To create a capacity category to configure work skills, work skill groups, and time slots:

1. Navigate to the **Configuration** page and click **Capacity Categories**.
2. Click **Add New**.
3. Enter the necessary details. The table below provides the fields available and the description of each field.

Field	Description
Name	Enter the name of the capacity category. The name is displayed in the list and in the quota matrix. If the application is configured for multiple languages, input boxes will appear for each language.
Label	Specify a label. It is used in the context of APIs and it must conform to a standard naming convention.
Active	Select the Active check box to mark this capacity category as active. Only active capacity categories are used in the quota matrix.

4. Click **Save**.

After the capacity category is created, add work skills, work skill groups and time slots to it.

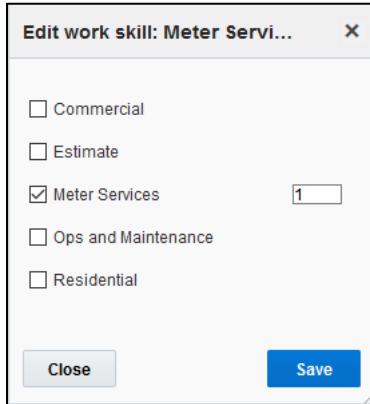
Example:

< Configuration Capacity categories					Q Name, Label or ID	Add New
<input type="checkbox"/>	ID	Name	Label	Status	Work Skills	Time slots
<input type="checkbox"/>	157	Estimate	EST	✓	Estimate(1)	08-10; 10-12; 13-15; 15-17; All-Day

Adding Work Skill Groups to a Capacity Category

To assign work skills and work skill groups to a capacity category:

1. Navigate to the **Configuration** page and click **Capacity Categories**.
2. Click the pencil icon to edit the work skills.
3. Select the work skill group and provide the work skill condition level value.



4. Click **Save**.

Time Slots

A time slot is a fixed time interval specified in the activity management to perform activities. It denotes the starting time and is assigned to a bucket in the capacity management.

Creating a Time Slot

To create a time slot:

1. Navigate to the **Configuration** page and click **Time Slots**.
2. Click **Add New**.
3. Enter the following details:
 - **Name:** Name the time slot in the *start time – end time* format. Example: 8-10
 - **Time slot label:** Enter the specific label name for the time slot.
 - **Status:** Select **Active** or **Inactive** from the drop-down.
Note that Oracle Field Service Cloud assigns activities and capacity management to active time slots only.
 - **All-day time slot:** Select it for the time slot to last the entire day.
 - **Time from:** Enter the time to indicate when the time slot begins.
 - **Time to:** Enter the time when the time slot ends.
 - **Capacity Categories:** Select to add activity types and work skill types.

<input type="checkbox"/>	ID	Name ▲	Time slot label	Status	Time Slot	Capacity Categories	Actions
<input type="checkbox"/>	1	08-10	08-10	✓	08:00 AM - 10:00 AM	Commercial, Estimate, Meter Services, Residential	Modify

4. Click **Add**.

Adding Time Slots to a Capacity Category

To add a time slot to a capacity category:

1. Navigate to the **Configuration** page and click **Capacity Categories**.
2. Hover over the **Time Slot** column to view the pencil icon.
3. Click it to edit the time slot.
4. Select the required time slots to assign to the capacity category.
5. Click **Save**.

Enabling Quota Management at Bucket Level

Note that quota management can only be enabled at a bucket level. To do so:


1. Navigate to the **Configuration** page and click **Quota Management**.
2. Select quota, capacity area, resource info.
3. Select the **Use as Capacity Area** check box.
The quota Management feature is enabled for this bucket. You can now add the management information to your quota matrix.
4. In the **Quota Management** section, configure the following features:
 - **Time Slots:** Edit to add time slots to this bucket. If the time-interval (availability) based booking is configured, do not add time-slots.
 - **Capacity Categories:** Edit to define capacity category types.
5. Click **OK**.


Configuring Quota Options

To configure the quota management settings:


1. Navigate to the Configuration page.
2. Select **Time slot based quota** check box and select **Quota**.
3. Select a capacity area/bucket from the left-hand pane.
4. Click the **Configuration** icon.
5. On the **Configuration** page for the selected bucket, configure the parameters as shown in the figure below.

Capacity management

Capacity category: Meter Services 

Working time unit: minutes 

Booking

Available time slots: 08-10, 10-12, 13-15, 15-17, All-Day 

Allow closing of booking on work zone level

Use Quota management

- Based on booking intervals
Recommended for overlapped time slots or significant variety of work duration
- Based on Time slots
Recommended for long non-overlapping time slots with short work duration

Quota management

Quota Definition level day time slot capacity category

Quota by day

- Enter quota as % of capacity defined by calendar
- Quota is entered in minutes
- Reduce quota by the total duration of activities not assigned to any capacity category

Quota by capacity category

- Quota is entered as % of maximum capacity available in this category
- Quota is entered as % of quota defined on parent level
- Quota is entered in minutes

Quota by time slot

- Quota is entered as % of capacity available by calendar
- Quota is entered as % of quota defined on parent level
- Quota is entered in minutes

Save

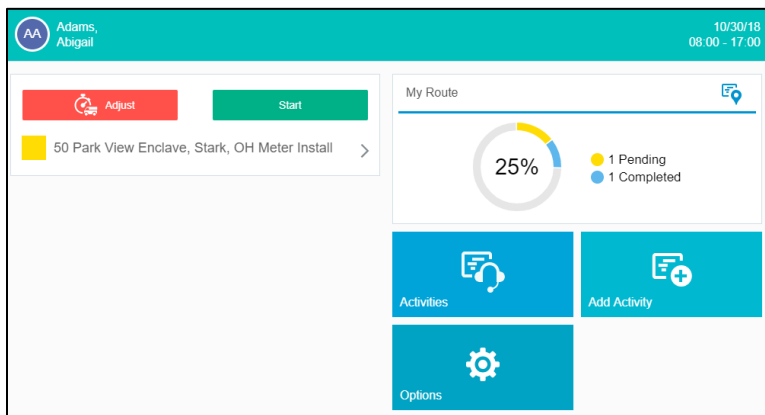
Chapter 4: User Operations

This chapter provides step by step instructions for user operations.

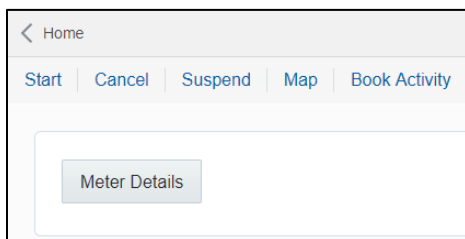
1. Login to Oracle Field Service Cloud Mobility application.

You can access the application by adding '/m' to the Oracle Field Service Cloud URL <ofsc_link/m>.

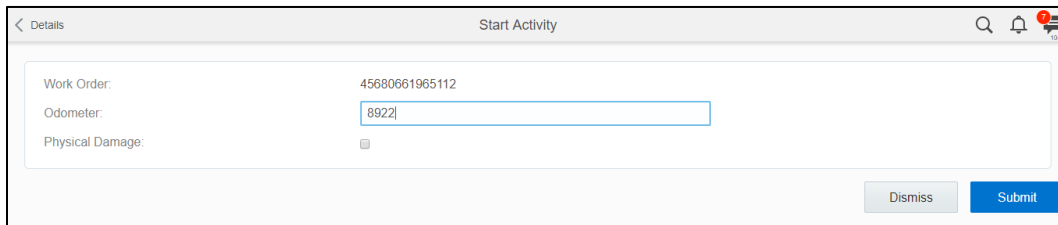
2. Access the **Mobility** page using the worker/technician's credentials. The page shows activities in the queue of the worker.
3. Click **Start** to start the activity in the worker's queue.



4. Click ">" against the activity. The options **Start**, **Cancel**, **Suspend**, **Map**, and **Book Activity** are displayed.



5. Click **Start** to start the activity in the worker's queue.
6. Enter the odometer details and click **Submit**.



7. Click **Meter Details**. Enter the **Badge Number** and click **Submit**

Meter Information

New Meter Details

Verify Device

Manual Entry: No
 Yes

Badge Number:

Meter Information

Existing Meter Details

Status Found*:

Status Left*:

Device Verification

Verify

Manual Entry:

New Meter Details

Badge Number:

Configuration Type:

Meter Location:

Device Verification

Device Details

Device Type: Meter

Badge Number:

Serial Number:

Dismiss Submit

8. Click **Meter Details** and click **Verify**. After the verification is successful, the meter reading information is displayed in the **Registers Information** section.

<p>Service Point Details</p> <p>Service Point ID: 709687316702</p> <p>Service Point Status: Connected</p> <p>Service Point Type: CCS-DFSC Service Point Type</p> <p>Premise Type: Single family home</p> <p>Service Type: Electric Service</p> <p>Life Support: None</p> <p>Device Location: <input type="text" value="In Garage"/></p> <p>Device Location Details: <input type="text" value="device in garage"/></p> <p>Warnings: <input type="text" value="Bad dog"/></p> <p>Instructions: <input type="text" value="Check Seal"/></p> <p>Instruction Details: <input type="text" value="Details to check seal"/></p>	<p>Registers Information</p> <p>New Meter Reading Details</p> <p>Read Sequence: 1</p> <p>Unit Of Measure: KWH</p> <p>Time Of Usage: Peak</p> <p>SOJ: PEAK</p> <p>Dials: 8</p> <p>Decimals: 3</p> <p>Reading*: <input type="text" value="99"/></p> <p>Override Reading: <input checked="" type="radio"/> No <input type="radio"/> Yes</p> <p>Lower Limit: 0</p> <p>Upper Limit: 0</p>
<p>Meter Information</p> <p>New Meter Details</p> <p>Verify Device</p> <p>Manual Entry: <input checked="" type="radio"/> No <input type="radio"/> Yes</p> <p>Badge Number: <input type="text" value="8996"/></p> <p>Status: Verification Successful</p>	

9. Enter the respective details in the **Meter Information** and **Registers Information** sections. Click **Submit**.
10. Click **Complete**.

Activity Details (04/2)

Complete Adjust Time Not Done Suspend Map Book Activity Nearby Activities Knowledge

Service Information

Go back to Activities list, wait 10 seconds and come back to see newly populated information below

Activity Type:	Meter Install
Site Address:	00 TestScalar2
Work Order:	99027294236015
Status:	Started

Customer Information

Account Number:	1220880055
-----------------	------------

Scheduling Information

Start - End:	06:51 - 07:39
Start Time - End Time:	07:39 AM
Duration:	48 minutes

Meter Details

11. On the **End Activity** page, enter the required details. Click **Submit**.

End Activity

Completed

Activity Notes:

Customer Contact Type:

Customer Contact Comments:

Remarks:

Dismiss Submit

Chapter 5: Customizations

Property additions and customizations help customers using this integration to enhance the functionality of the integration and increase the usability too. Customizations are done in Oracle Integration Cloud, Oracle Field Service Cloud and Oracle Utilities Customer Cloud Service depending on the fields, elements or properties to be added and their availability.

This chapter focusses on the following customizations:

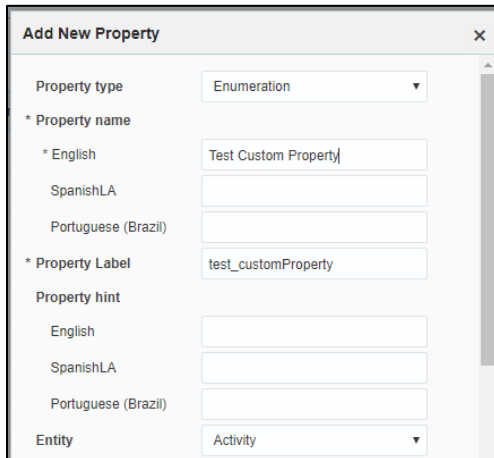
- [Adding New Fields to Field Activity](#)
- [Adding New Fields and Lookup to Field Activity](#)
- [Adding New/Custom Activity Types](#)
- [Adding Enumeration Values to OFSC Property](#)
- [Adding Fields to UI in OFSC](#)

Adding New Fields to Field Activity

This section includes steps to add new fields to Field Activity. These fields are available but not present in Field Activity.

Oracle Field Service Cloud Configurations

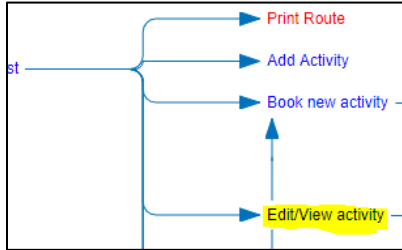
1. Login to Oracle Field Service Cloud.
2. Navigate to **Configuration > Properties > Add New Property**.
3. Select the **Entity** and **Type of GUI**. Enter the enumeration values (example: customprop1 and customprop2).



The screenshot shows a dialog box titled "Add New Property" with a close button (X) in the top right corner. The dialog contains the following fields:

- Property type: Enumeration (dropdown menu)
- * Property name:
 - * English: Test Custom Property (text input)
 - SpanishLA: (text input)
 - Portuguese (Brazil): (text input)
- * Property Label: test_customProperty (text input)
- Property hint:
 - English: (text input)
 - SpanishLA: (text input)
 - Portuguese (Brazil): (text input)
- Entity: Activity (dropdown menu)

4. Click **Save**.
5. Navigate to **User Types** and select the required user type.
6. Navigate to **Screen Configurations** of the selected user type and open the **Edit/View activity** section.



7. In the **Add New Element** section, drag and drop a new 'Input' to add a new element.
8. Map the element to **Test Custom Property**. Save this screen configuration after mapping the field.

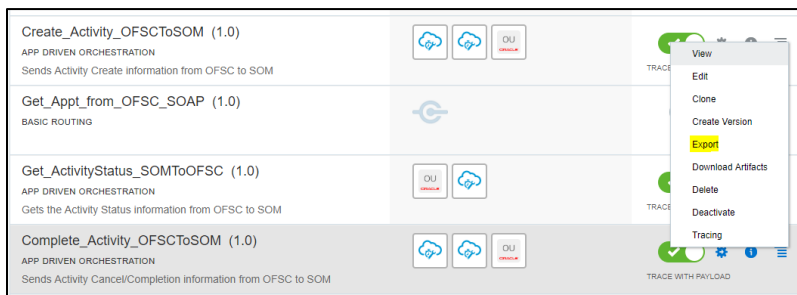
Service Point Details	
Service Point ID:	<input type="text"/>
Warnings:	<input type="text"/>
Instructions:	<input type="text"/>
Instruction Details :	<input type="text"/>
Disconnect Location:	<input type="text"/>
Life Support:	<input type="text"/>
Service Point Type:	<input type="text"/>
Premise Type:	<input type="text"/>
Not Done Reason:	<input type="text"/>
Test Custom Property:	<input type="text"/>

Oracle Integration Cloud Configurations

In Oracle Integration Cloud configurations use xsl files and not graphical mapper to include new properties. Since the changes are made in Oracle Field Service Cloud and the flow is from Oracle Field Service Cloud to Oracle Utilities Customer Cloud Service, modify the .iar file for *Complete Activity*.

For xsl files to include the new field mappings as properties in Oracle Field Service Cloud:

1. Login to Oracle Integration Cloud.
2. Extract the .iar file.
3. Navigate to **Integrations** and export **Complete_Activity_OFSCtoSOM**.



- For Oracle Field Service Cloud response use the following xsl file. Navigate to the file location and select it.

`COMPLETE_ACTIVITY_OFSCITOSOM_01.00.0000\icspackage\project\COMPLETE_ACTIVITY_OFSCITOSOM_01.00.0000\resources\processor_509\resourcegroup_512\req_358b3cdb3d5745fb8e082acdde65`

For detailed information see *Oracle Customer Cloud Service Integration to Oracle Field Service Cloud Configuration Guide v20B*.

Name	Date modified	Type	Size
req_358b3cdb3d5745fb8e082acdde659bb2.xsl	16-Nov-18 11:11 A...	XSL Stylesheet	69 KB
req_358b3cdb3d5745fb8e082acdde659bb2_stateinfo.xml	16-Nov-18 11:11 A...	XML File	2 KB

- Navigate to `<xsl: template..>` tags towards the end of the file.
- Select the appropriate template tag based on where the new UI property has to be added in Oracle Field Service Cloud UI.

For example: To add a new field on the **Service Point Details** screen, choose the following xsl tag:

`<xsl:template name="servicePointDataDetails_Customizations">`

```

660     </xsl:variable>
661     <xsl:value-of select="concat($SOMDateTime,$SOMOffset)"/>
662   </xsl:if>
663 </xsl:if>
664 </xsl:template>
665 <xsl:template name="customerContactDetails_Customizations">
666   <!--Add customerContactDetails related customizations here-->
667 </xsl:template>
668 <xsl:template name="completionInformation_Customizations">
669   <!--Add completionInformation related customizations here-->
670 </xsl:template>
671 <xsl:template name="servicePointDataDetails_Customizations">
672   <!--Add servicePointDataDetails related customizations here-->
673 </xsl:template>
674 <xsl:template name="servicePointCompletionDetails_Customizations">
675   <!--Add servicePointCompletionDetails related customizations here-->
676 </xsl:template>
  
```

- Add the new customized property in this tag. The sample custom property named `u_custom` is as below:

```

<tns:custom1>
  <xsl:value-of
    select="$invokeOFSCGetActivity/nsmpr0:canonical_GETResponse/nsmpr0:activities.definitions.getActivitySchema/nsmpr1:u_custom"/>
</tns:custom1>
  
```

```

<xsl:template name="servicePointDataDetails_Customizations">
  <tns:custom1>
    <xsl:value-of select="$invokeOFSCGetActivity/nsmpr0:canonical_GETResponse/nsmpr0:activities.definitions.getActivitySchema/nsmpr1:u_custom"/>
  </tns:custom1>
</xsl:template>
  
```

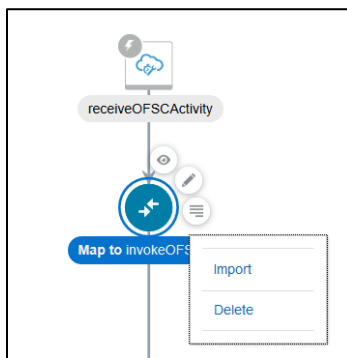
- Once done editing, save the xsl and test the syntax by opening it in a web browser. It should open as shown without any errors.

```

<?xml version="1.0" encoding="UTF-8"?>
- <xsl:stylesheet xmlns:ns2="http://xmlns.oracle.com/ics/tracking/ics_tracking_context.xsd"
xmlns:dvm="http://www.oracle.com/XSL/Transform/java/oracle.tip.dvm.LookupValue"
xmlns:xref="http://www.oracle.com/XSL/Transform/java/oracle.tip.xref.xpath.XRefXPathFunctions"
xmlns:mhdr="http://www.oracle.com/XSL/Transform/java/oracle.tip.mediator.service.common.functions.Mediator"
xmlns:ns0="http://xml.oracle.com/adapters/extension" xmlns:socket="http://www.oracle.com/XSL/Transform/jav
xmlns:ns3="http://xmlns.oracle.com/cloud/generic/rest/fault/OfscCloudAdapter/invokeOFSCGetActivity"
xmlns:nsmpr2="http://www.oracle.com/XSL/Transform/java/com.bea.wli.sb.functions.dvm.DVMFunctions"
xmlns:nsmpr1="https://api.etadirect.com/rest/ofscCore/v1/metadata-catalog" xmlns:xml="http://www.w3.org/XML
xmlns:nsmpr0="http://xmlns.oracle.com/cloud/adapters/extension/OfscCloudAdapter/invokeOFSCGetActivity_REQUEST/types
xmlns:ignore01="http://www.oracle.com/XSL/Transform/java" exclude-result-prefixes="oraext xsd xp20 nssrcmpr ns
nsmpr1" xmlns:soap="http://schemas.xmlsoap.org/wsdl/soap/" xmlns:ouaf="http://ouaf.oracle.com/" xmlns:xsl="h
xmlns:fn="http://www.w3.org/2005/xpath-functions" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:openorgwss="http://www.w3.org/2004/01/oasis-200401-wss-wssecurity-utility-1.0.xsd" xmlns:nssrcdf="http://xmlns.oracle.com/pr
xmlns:ns1="http://xmlns.oracle.com/cloud/adapters/extension/Oracle_Uilities/invokeSOMActivity" xmlns:oracle-xsl-mapper="h
xmlns:tns="http://ouaf.oracle.com/webservices/d1/D1-FieldActivityIBComm" xmlns:ora="http://schemas.oracle.co
xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/" xmlns:ns7="http://www.oracle.com/ofsc-metadata-catalog" xmlns
xmlns:catalogtypes="http://xmlns.oracle.com/XSL/Transform/java/oracle.tip.pc.services.functions.ExtFunc"
xmlns:ns4="http://www.w3.org/2001/XMLSchema" xmlns:xp20="http://www.oracle.com/XSL/Trans
xmlns:xsl="http://www.w3.org/2001/XMLSchema" xmlns:wsp="http://www.w3.org/ns/ws-policy" xmlns:plnk="htt
xmlns:oraext="http://www.oracle.com/XSL/Transform/java/oracle.tip.pc.services.functions.ExtFunc"
xmlns:nstrgmp="http://xmlns.oracle.com/cloud/adapters/extension/Oracle_Uilities/invokeSOMActivity/types" xml:id="id_1"

```

- To upload the xsl file in the OIC, deactivate the integration, open the flow and select the mapping icon. Click on the *More Actions* option and then on the *Import* option as shown below. Browse the .xsl file and import it.



Adding New Fields and Lookup to Field Activity

This section focuses on adding new fields that are not available.

Oracle Field Service Cloud Configurations

For instructions see the [Oracle Field Service Cloud Configurations](#) section in [Adding New Fields to Field Activity](#). Add the property, drag and drop it on the UI screen where it is needed and save the UI screen in the user types.

Oracle Integration Cloud Configurations

- For a customized lookup in Oracle Field Service Cloud, follow the steps in the [Oracle Integration Cloud Configurations](#) section in [Adding New Fields to Field Activity](#).

Extract .iar and navigate to the required xsl tag (based on the location of the new lookup) in the xsl file you are editing as per the process flow.

2. Instead of adding the custom property, modify the following:

```

<tns:customLookup>
<xsl:value-of select="nsmpr2:lookupValue('tenant/resources/dvms/OFSCSOM_customLookup',
'OFSC_customLookup',
$invokeOFSCGetActivity/nsmpr0:canonical_GETResponse/nsmpr0:activities.definitions.getActivitySch
ema/nsmpr1:u_Remarktypes, 'SOM_customLookup',
$invokeOFSCGetActivity/nsmpr0:canonical_GETResponse/nsmpr0:activities.definitions.getActivitySch
ema/nsmpr1:u_Remarktypes)"/>
</tns:customLookup>

```

```

<xsl:template name="servicePointDataDetails_Customizations">
<tns:customLookup>
<xsl:value-of select="nsmpr2:lookupValue('tenant/resources/dvms/OFSCSOM_customLookup', 'OFSC_customLookup',
$invokeOFSCGetActivity/nsmpr0:canonical_GETResponse/nsmpr0:activities.definitions.getActivitySchema/nsmpr1:u_Remarktypes, 'SOM_customLookup',
$invokeOFSCGetActivity/nsmpr0:canonical_GETResponse/nsmpr0:activities.definitions.getActivitySchema/nsmpr1:u_Remarktypes)"/>
</tns:customLookup>
</xsl:template>

```

3. Upload the xsl file in Oracle Integration Cloud after verification in a browser.

Oracle Utilities Customer Cloud Service Configurations

To configure Oracle Utilities Customer Cloud Service with a new schema element:

1. Navigate to the *D1-FieldActivityOBComm* business object and identify the data area to add the new schema element.

For example: To make changes to the **Service Point Details** section, the data area to be modified is a custom data area created for Oracle Field Service Cloud.

DATA AREA	D1-NewOFSCDataAreaExt
DESCRIPTION	New OFSC DA added for extending the Service Point DA
OWNER	Customer Modification

Schema Designer ⓘ

View Mode

TREE **TEXT**

```

1 <schema xmlns:uiHint="http://oracle.com/ouafUIHints">
2   <customField mdField="D1_CUSTOM_FIELD" dataType="string"/>
3 </schema>
4

```

2. Extend the data area by adding the Service Point Details DA in the extended DA section.

DATA AREA	D1-NewOFSCDataAreaExt
DESCRIPTION	New OFSC DA added for extending the Service Point DA
DETAILED DESCRIPTION	
EXTENDED DATA AREA	D1-SOSPDataDetails

3. New schema element should now be displayed in BO schema.

```

<servicePointDataDetails mdField="D1_SO_SP_DATA_DET_LBL" t
<disconnectLocation mdField="D1_DISCONNECT_LOCATION_CD" da
<serviceWarnings mdField="D1_SERVICE_WARNINGS_CD" dataType
<serviceInstructions mdField="D1_SERVICE_INSTRUCTIONS_CD"
<instructionDetails mdField="D1_INSTRUCTION_DETAILS"/>
<serviceAgreementStatus mdField="D1_SA_STATUS_FLG"/>
<servicePointId mdField="D1_SERVICE_POINT_ID"/>
<serviceAgreementId mdField="D1_SA_ID"/>
<premiseId mdField="D1_PREMISE_ID"/>
</servicePointDataDetails>
<customField mdField="D1_CUSTOM_FIELD" dataType="string"/>

```

Adding New/Custom Activity Types

Oracle Field Service Cloud allows users to create/update or clone the activity types.

Creating an Activity Type

To create and activity:

1. Navigate to **Configuration > Resources, Activities, Inventories > Activity Types**.
2. Click **Add Activity Type**.

Activity type info		Features	
* Label	Meter Install	<input type="checkbox"/>	Allow mass activities
* Name		<input type="checkbox"/>	Teamwork
* English	Meter Install	<input type="checkbox"/>	Enable segmenting and extended duration
SpanishLA		<input checked="" type="checkbox"/>	Allow move between resources
Portuguese (Brazil)		<input checked="" type="checkbox"/>	Allow creation in buckets
Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Allow reschedule
Group	Customer	<input checked="" type="checkbox"/>	Support of not-ordered activities
* Default Duration	48 minutes	<input checked="" type="checkbox"/>	Allow non-scheduled
Color scheme		<input checked="" type="checkbox"/>	Support of work zones
Copy from		<input checked="" type="checkbox"/>	Support of work skills
Pending	FFDE00	<input checked="" type="checkbox"/>	Support of time slots
Completed	79B6EB	<input checked="" type="checkbox"/>	Support of inventory
Warning	FFAAAA	<input checked="" type="checkbox"/>	Support of links
Suspended	99FFFF	<input checked="" type="checkbox"/>	Support of preferred resources
Not Done	60CECE	<input type="checkbox"/>	Allow Repeating Activities
		<input checked="" type="checkbox"/>	Calculate travel

3. Enter the label and name for activity in the respective **Label** and **Name** fields.
4. Select **Activate** to activate the activity type.
5. Select the necessary features.

Cloning an Activity Type

To clone an activity type:

1. Navigate to **Configuration > Resources, Activities, Inventories > Activity Types**.
2. In the list of activity types, click **Clone** for the activity type to be cloned.

Configuration Activity Types				
ID	Status	Activity Type Name	Activity Type Label	Actions
66	✓	Commercial Facility Maintenance	05	Modify Clone
62	✓	Cooling Maintenance	01	Modify Clone
76	✓	Disconnect Warning	Disconnect Warning	Modify Clone
67	✓	Estimate	06	Modify Clone
81	✓	Meter Install	Meter Install	Modify Clone
65	✓	Miscellaneous	04	Modify Clone
73	✓	Multi-Day Activity	MD	Modify Clone
63	✓	Natural Gas Maintenance	02	Modify Clone
68	✓	No Charge Service	07	Modify Clone
70	✓	Sale	09	Modify Clone
69	✓	System Overhaul / Install	08	Modify Clone
77	✓	Turn on Pilot light1	Turn on Pilot light1	Modify Clone
72	✓	VIP Service Commercial	10	Modify Clone
71	✓	VIP Service Residential	11	Modify Clone

After the clone is complete, all features of the existing activity will be applied to the new activity type.

3. Enter a new activity label and name. Click **Clone**.

Clone activity type

Activity type info

* Label:

* Name:

 * English:

 SpanishLA:

 Portuguese (Brazil):

Active:

Group:

* Default Duration: minutes

Color scheme

Copy from:

Pending: FFDE00

Completed: 79B8EB

Warning: FFAAAA

Suspended: 99FFFF

Not Done: 808080

Features

Allow mass activities

Teamwork

Enable segmenting and extended duration

Allow move between resources

Allow creation in buckets

Allow reschedule

Support of not-ordered activities

Allow non-scheduled

Support of work zones

Support of work skills

Support of time slots

Support of inventory

Support of links

Support of preferred resources

Allow Repeating Activities

Calculate travel

Cancel
Clone

Adding Enumeration Values to OFSC Property

Oracle Filed Service Cloud includes enum properties that need to add values to Oracle Utilities Customer Cloud Service, such as SQL, TOU, UOM, meter configuration type, etc.

To add values to the enum property:

1. Login to Oracle Field Service Cloud.
2. Navigate to **Configuration > Properties**.
3. Search for the property with label.
4. Click **Modify Property**.

Values field shows a combination of *Description[id]*. Example: Simple Eletrical[E-DEFAULT]

The screenshot shows the 'Modify Property' interface. At the top, the 'Entity' is 'Activity'. The 'GUI' is set to 'Combobox'. There is a checkbox for 'Clone property data on Reopen or Prework'. Below this is the 'Enumeration values' section with input fields for English, SpanishLA, and Portuguese (Brazil). An 'Active' checkbox is checked. There are 'Add' and 'Change' buttons. A 'Values' list is shown with the following items: Simple Eletrical[E-DEFAULT], Simple Electrical Residential[E-DEFAULT], Default Single Offline Register, Default five Offline Registers[I], Default Single Register[INT-SC], and Default five Registers[INT-SOM].

5. In the **English** field, enter the description and code.
6. Enter "Item" to verify an item as part of custom activity and activity as part of ID. Example: Item[Custom_item_activity_type]
7. Click **Add** to add the values to the **Values** list.
8. Click **Update** to save the value to the property.

The table below lists the properties to be updated to add custom values apart of the demo values (that are part of the accelerator).

OFSC Property	Oracle Utilities Customer Cloud Service Admin Table
Service Point Status Code	Service Point Status
New Item Type	Device Type
New Meter TOU	Time Of Use
Customer Contact Type	Customer Contact Type

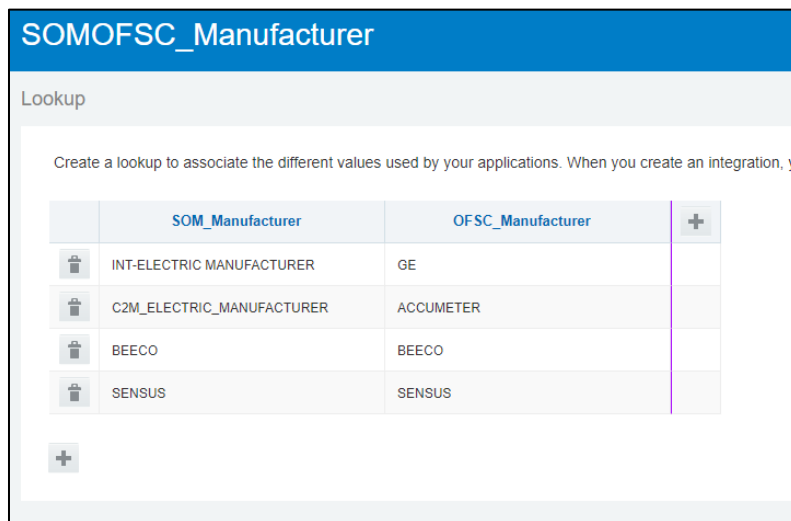
New Meter SQI	Service Quantity Identifier
Disconnect Location	Disconnect Location
Service Point Instructions	Service Instructions
Service Point Warnings	Service Point Warnings
New Item Model	Model
New Meter Model	Model
New Item Manufacturer	Manufacturer
New Meter Manufacturer	Manufacturer
New Meter UOM	Unit Of Measure
Item Configuration Type	Device Configuration Type
Unit Of Measure	Unit Of Measure
Time Of Use	Time Of Use
Premise Type	Premise Type
Service Point Type	Service Point Type
Meter Configuration Type	Device Configuration Type
Remark Type	Remark Type
Premise Warning	Service Point Warnings
Cancellation Reason	FA Cancel Reason
Customer Contact Type	Customer Contact Type
Meter ID Types	Meter ID Type
Read Type	Read Type

9. Add entry to the corresponding Oracle Integration Cloud look up.

Example: After adding value to the Manufacturer properties, add an entry to the SOMOFSC_Manufacturer Oracle Integration Cloud look up.

To add an entry to the look up:

- a. Login to Oracle Integration Cloud.
- b. Navigate to **Designer > Lookups**.
- c. Search for the respective look up. Example: SOMOFSC_Manufacturer



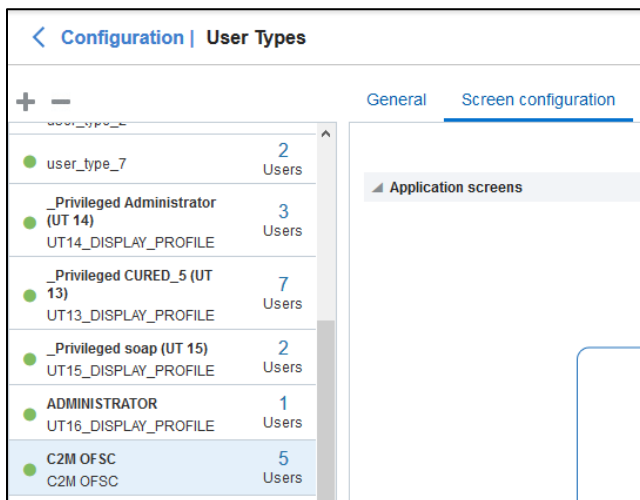
- d. Click +.

- e. Enter the SOM code in the **SOM_Manufacturer** column.
- f. Enter the ofsc enum field ID in the **OFSC_Manufacturer** column.
- g. Click **Save**.
- h. Deactivate and activate the integration using the look up.

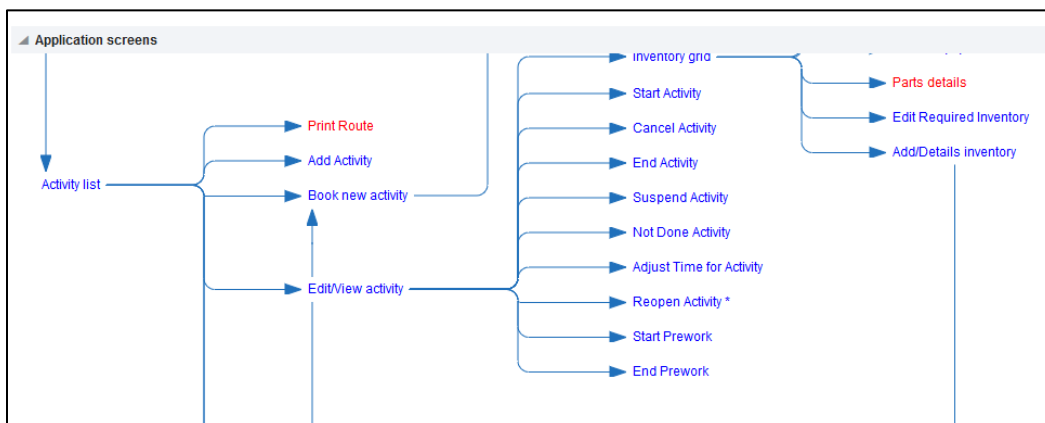
Adding Fields to UI in OFSC

To add newly created properties to the Mobility/UI screen:

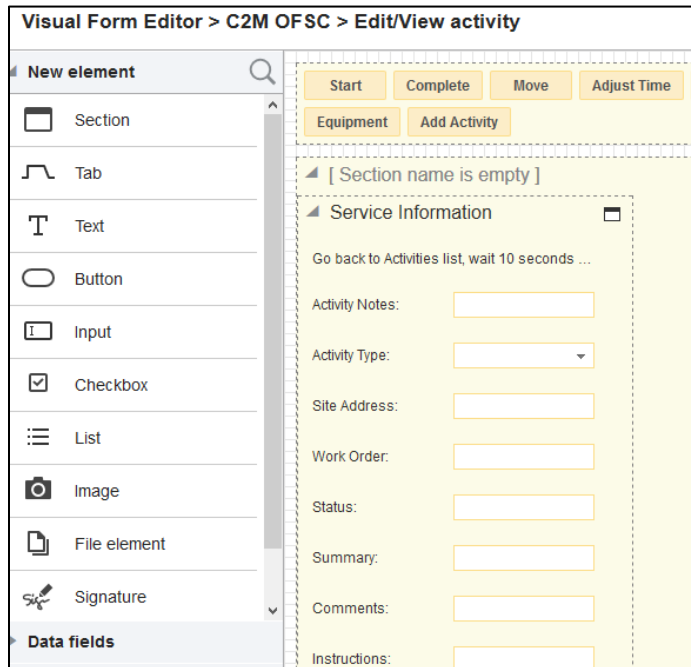
1. Login to Oracle Field Service Cloud.
2. Navigate to **Configuration > User Types**.
3. Click the **C2M OFSC** user type and click **Screen configuration**.



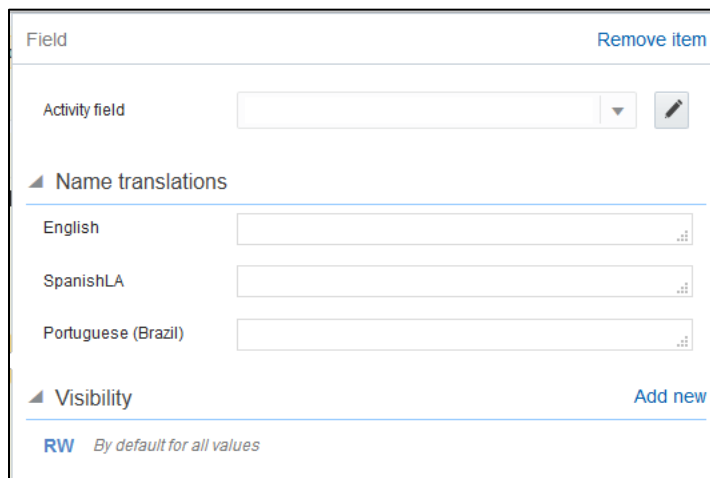
The **Application screens** tab shows different screens.



4. Click **Edit/View Activity** to add a field to the activity level.



5. Drag and drop the required elements available in the left pane.



6. Select the required property from the **Activity field** section drop down.
7. In the **Name translations** section, enter the label name in the respective language field.
8. In the **Visibility** section, enter if the property should be read or read-write.
9. Click **Save**.

Glossary Customization

The labels of equipment and install and detach screens can be changed using the glossary file available as part of the accelerator zip.

Category (ctg)	Identifier (id)	Type (tp)	ID/Label (lbl)	User Type	English (en-US)
Glossary: mobile_shared, wap_inventory	glossary	translation	10109		Assets/Equipment
Glossary: mobile_shared	glossary	translation	10865		Assets/Equipment
Glossary: mobile_shared	glossary	translation	10767		Asset/Equipment Details
Glossary: wap_inventory	glossary	translation	10111		Existing

To change the label, modify the text in the **English(en-us)** column and re-import the glossary file.

Before changing the glossary file.

Details **Assets/Equipment**

Attach Equipment | Move Equipment to New Meter

Existing 2

- Measuring Component Equipment:** Badge No: C-FR-3 , Serial No: C-FR-3 , UOM: KWH , TOU: Peak , SQL: Peak 1
- Meter Equipment:** Badge No: M-FR-3 , Serial No: M-FR-3 1

After changing the glossary file.

Details **Equipment**

Attach Equipment | Move Equipment to New Meter

Existing 2

- Measuring Component Equipment:** Badge No: C-FR-3 , Serial No: C-FR-3 , UOM: KWH , TOU: Peak , SQL: Peak 1
- Meter Equipment:** Badge No: M-FR-3 , Serial No: M-FR-3 1

Chapter 6: Hosting Plug-Ins in OFSC

Plug-Ins can be hosted within Oracle Field Service or externally.

Oracle Field Service cloud has a limit of up to 10 plug-ins that can be hosted within Oracle Field Service cloud.

The steps to host a Plug-In within Oracle Field Service cloud is documented in https://docs.oracle.com/en/cloud/saas/field-service/20a/fapcf/configure-and-use-plug-ins.html#c_hostingPlugins

The plugins can be hosted externally on:

- Any webserver (example: Tomcat) running on a virtual machine either on premise or on cloud
- It can be stored in Object Storage on a cloud instance by uploading the files either in a public bucket

Additionally, if the plugins are hosted externally:

1. Navigate to **Configuration > Application > Additional Resources**.
2. Select **Allow Cross-origin resource sharing (CORS) from the following web domains** and provide the domain of the server on which the plugins are hosted.

Hosting Files on a Web Server

Plugins can be hosted on a webserver running on a virtual machine either on premise or on cloud. The mobile device or browser needs to be able to reach and communicate with the server hosting the plugin files.


Please refer to the documentation of the webserver of choice on how setup and host the static content. The unzipped files of the plugin is then hosted on the webserver. The path to the index.html or the directory containing the index.html is configured in the URL field of the plugin screen as defined in <https://docs.oracle.com/en/cloud/saas/field-service/20a/fapcf/configure-and-use-plug-ins.html#configure-and-use-plug-ins>

The externally hosted plugin can be secured and Oracle Field Service Cloud supports authentication mechanism as defined in

https://docs.oracle.com/en/cloud/saas/field-service/20a/fapcf/configure-and-use-plug-ins.html#c_authentication

Storing files on Object Storage

Before storing files in Object Storage please ensure that the basic administration tasks in Oracle Cloud Infrastructure related to Object Storage have been completed properly, and that the compartments and buckets where the plugin files are stored have been setup.



For more information on Oracle Cloud Object Storage setup for Oracle Utilities Cloud Services, please see the latest Oracle Utilities Cloud Services Object Storage Setup Guide.

https://docs.oracle.com/cd/F27772_01/PDF/UGBU_Cloud_Services_Object_Storage_Setup_20A.pdf

Using Public Bucket

The unzipped plugin files can be uploaded into a public bucket in which case the files are not protected and is open to public. The URL to index.html in the public bucket is configured in URL field in Oracle Field Service Cloud.

Chapter 7: Equipment Support in OFSC

The Oracle Field Service Cloud screens are enhanced to support equipment that includes attaching, detaching, and replacing or exchanging which comes as part of activity from the source application.

The equipment includes support at service point level, meter level measuring component level.

This chapter includes the following:

- [Pre-requisites](#)
- [Equipment Screens](#)
- [Undo Attach](#)
- [Replace Equipment](#)
- [Exchange Meter](#)

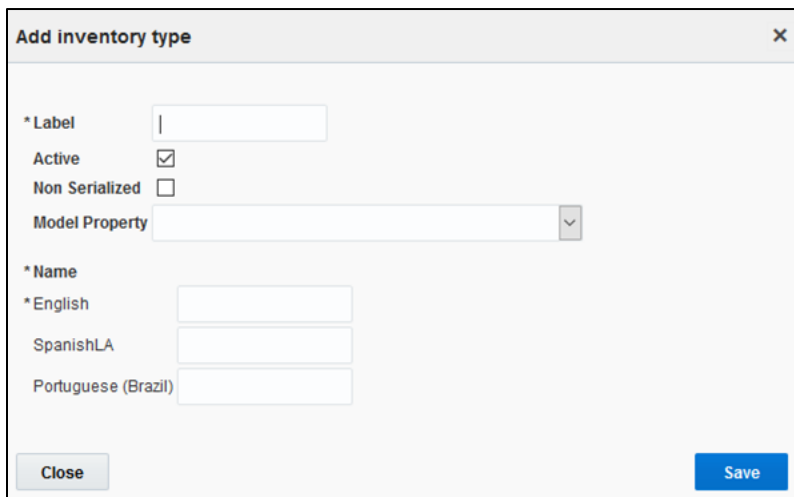
Pre-requisites

To support equipment in Oracle Field Service Cloud create the following inventory types:

- MERT
- SERT
- CERT

To create an inventory type:

1. Login to Oracle Field Service Cloud with admin credentials.
2. Navigate to **Configuration > Inventory types**.
3. Click Add New.



The screenshot shows a web form titled "Add inventory type" with a close button (X) in the top right corner. The form contains the following fields and controls:

- * Label: A text input field.
- Active: A checked checkbox.
- Non Serialized: An unchecked checkbox.
- Model Property: A dropdown menu.
- * Name: A section header.
- * English: A text input field.
- SpanishLA: A text input field.
- Portuguese (Brazil): A text input field.
- Close: A button in the bottom left.
- Save: A button in the bottom right.

4. Enter 'MERT' in the **Label** field.
5. Select 'inventory_model' from the **Model Property** drop-down list.
6. Enter the name in the **Name** field against the language.
7. Click **Save**.

8. Repeat steps 4 to 7 to create other inventory types.

Equipment Screens

Oracle Field Service Cloud includes the following screens to attach an equipment:

- [Attach Equipment to Service Point](#)
- [Attach Equipment to Meter](#)
- [Attach Equipment to Measuring Component](#)

Attach Equipment to Service Point

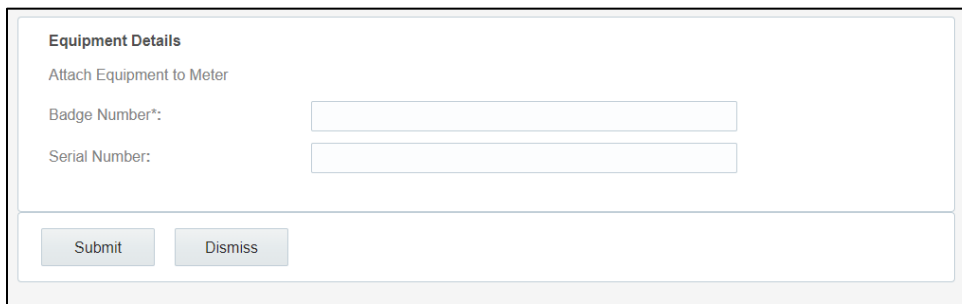
This screen allows to verify the attach. After the verification is successful, equipment will be attached to Service Point.

Provide the badge number and/or serial number to verify the equipment. After the verification is successful, equipment navigates to the **Attached** screen labeled 'SP'.



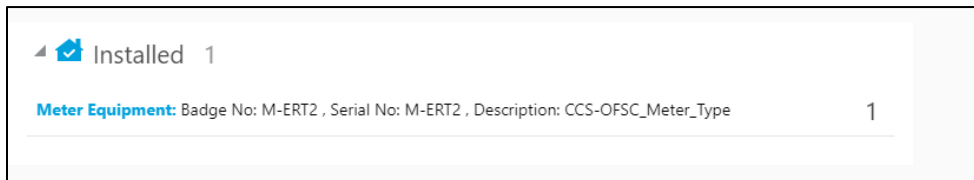
Attach Equipment to Meter

This screen allows to verify the attach. After the verification is successful, equipment will be attached to Meter.



The screenshot shows a mobile application interface for attaching equipment to a meter. The title is 'Equipment Details' and the subtitle is 'Attach Equipment to Meter'. There are two input fields: 'Badge Number*' and 'Serial Number:'. Below the input fields, there are two buttons: 'Submit' and 'Dismiss'.

Provide the badge number and/or serial number and click **Submit**. After the verification is successful, equipment navigates to the **Attached** screen labeled with Meter.



Attach Equipment to Measuring Component

This screen allows you to verify the attach. After successful verification, equipment will be attached to Measuring Component.

Measuring Component Details

Unit Of Measure*:

Time Of Usage:

Service Quantity Identifier:

Equipment Details

Attach Equipment to Measuring Component

Badge Number*:

Serial Number:

Enter the Unit Of Measure, Time Of Usage, Service Quantity Identifier and Badge Number and/or Serial Number. Click **Submit**. After verification is successful, equipment navigates to the **Installed** screen labeled with Measurement Component.

🏠 Installed 1

Measuring Component Equipment: Badge No: C-ERT2 , Serial No: C-ERT2 , Description: CCS-OFSC_Meter_Type , UOM: KWH , TOU: Peak , SQI: Peak 1

Undo Attach

After attaching an equipment, it can be detached.

To undo an equipment attach:

1. Click the attached equipment. The equipment details are displayed along with the **Undo Attach** option.

Undo Attach

Equipment Level	Measuring Component
Badge Number:	C-ERT2
Serial Number:	C-ERT2
Device Type Description:	CCS-OFSC_Meter_Type
Unit of Measure:	KWH
Time of Use:	Peak
Service Quantity Identifier:	Peak

2. Click **Undo Attach**. A confirmation alert is displayed.
3. Click **Yes** to delete the equipment from the inventory.

Equipment C-ERT2 - C-ERT2 will be detached. Are you sure?

Replace Equipment

The existing equipment can be replaced from the Service Point or Meter or Measuring Component level.

To replace an existing equipment:

1. Navigate to the **Existing** screen and click the equipment.



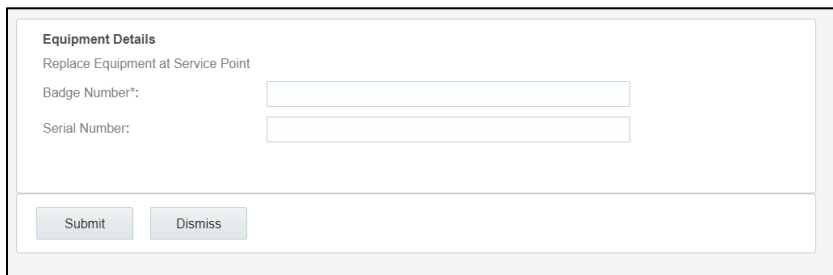
Existing 2	
SP 2	
SP Equipment: Badge No: R-SP-ERT , Serial No: R-SP-ERT	1
SP Equipment: Badge No: S-ERT2 , Serial No: S-ERT2	1

2. Click **Replace**.






Detach Replace	
Equipment Level:	SP
Badge Number:	R-SP-ERT
Serial Number:	R-SP-ERT
Attach Date Time:	2020-07-09 02:20:00

3. Enter the **Badge Number** and/or **Serial Number** values to verify. Click **Submit**.



Equipment Details	
Replace Equipment at Service Point	
Badge Number*:	<input type="text"/>
Serial Number:	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Dismiss"/>	

The existing equipment is added to the **Detached** screen and the new equipment appears in the **Installed** screen.


 Existing 1
SP Equipment: Badge No: R-SP-ERT , Serial No: R-SP-ERT 1
 Installed 1
SP Equipment: Badge No: R-SP-ERT , Serial No: R-SP-ERT , Description: C2M-OFSC-SP_AssetType 1
 Detached 1
SP Equipment: Badge No: S-ERT2 , Serial No: S-ERT2 1

Exchange Meter

Meter from the Service Point can be exchanged with a new meter. You can either move all equipment attached to the existing meter to the new meter or attach new equipment to the new meter.

After verifying the new device, Equipment screen displays the following options:

- [Attach Equipment](#)
- [Move Equipment to New Meter](#)

 Existing 2
Measuring Component Equipment: Badge No: C-FR-3 , Serial No: C-FR-3 , UOM: KWH , TOU: Peak , SQJ: Peak 1
Meter Equipment: Badge No: M-FR-3 , Serial No: M-FR-3 1

Attach Equipment

This attach screen similar to attach equipment screen which is used to verify the equipment and install the equipment to new meter.

Equipment Details

Attach Equipment to Meter

Badge Number*:

Serial Number:

Move Equipment to New Meter

This screen allows you to move all equipments attached to the existing meter to the new meter.

Move Equipment to New Meter

Existing 2

Measuring Component Equipment: Badge No: C-FR-3 , Serial No: C-FR-3 , UOM: KWH , TOU: Peak , SQI: Peak	1
Meter Equipment: Badge No: M-FR-3 , Serial No: M-FR-3	1

Click **Move Equipment to New Meter** to move all the equipment of old meter to installed screen.

Attach Equipment | Undo Equipment Move

Installed 2

Measuring Component Equipment: Badge No: C-FR-3 , Serial No: C-FR-3 , UOM: KWH , TOU: Peak , SQI: Peak	1
Meter Equipment: Badge No: M-FR-3 , Serial No: M-FR-3	1

Note: we can undo the Equipment move by clicking on Undo Equipment Move button.