

# ORACLE FIELD SERVICE CLOUD CONFIGURATIONS

FOR

## ORACLE WORK AND ASSET CLOUD SERVICE INTEGRATION TO ORACLE FIELD SERVICE CLOUD

(ALSO APPLICABLE TO ORACLE UTILITIES WORK  
AND ASSET MANAGEMENT)

SETUP GUIDE

20C



## Disclaimer

Oracle Field Service Cloud Configurations for Oracle Work and Asset Cloud Service Integration to Oracle Field Service Cloud, Setup Guide 20C

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# Preface

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Welcome to the Oracle Field Service Cloud Setup Guide for Oracle Utilities Work and Asset Cloud Service Integration to Oracle Field Service Cloud 20C.

This document focuses on the Oracle Field Service Cloud configurations and administration information required for this integration. The preface includes the following:

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

## Audience

This document is intended for anyone implementing the Oracle Utilities Integration for Work and Asset 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>.

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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                 |
| WAM  | Oracle Utilities Work and Asset Management |
| OIC  | Oracle Integration Cloud Service           |
| WACS | Work and Asset Cloud Service               |

# Chapter 1: Accelerator Overview

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

- [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 to configure and set up Oracle Field Service Cloud to be used in the Oracle Utilities Work and Asset Cloud Service integration to Oracle Field Service Cloud as the package contains only Oracle Utilities Work and Asset Cloud Service and Oracle Integration Cloud configuration files and instructions. It is used in addition to the integration package which provides a complete end-to-end set up for the integration.

The contents of the package are:

- **User Types** – Define layouts and UI screens. Refer to the [User Types](#) section for more details.
- **Properties** – Create layouts and mapping. Refer to the [Properties](#) section for more information.
- **Plugins** – The plugins that are part of this integration are measurements, service history, resource usage and validate completion. Refer to the [Forms and Plugins](#) section for more information.

## Accelerator Activity Types

This accelerator is a sample and supports a few Activity Types in this release. More activity types can be added based on the requirement.

## Chapter 2: Installing the 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.

- [Order of Importing the Package](#)
- [Activity Types](#)
- [Properties](#)
- [Glossary](#)
- [Forms and Plugins](#)
- [User Types](#)

### Order of Importing the Package

Make sure to follow the order mentioned below during the package import.

- Activity Types
- Properties
- Glossary
- Measurements Plugin
- ResourceUsage Plugin
- ServiceHistory Plugin
- ValidateCompletion Plugin
- PlannedServiceHistory Plugin
- Asset Component Install Exchange Undo Plugin
- Lock Unlock Activity
- Pick Up Work
- WACS OFSC User Type
- WACS OFSC Dispatcher User Type

### Activity Types

Activity types define the categories of the activity supported by Oracle Field Service Cloud (in this case, Oracle Utilities Work and Asset Cloud Service Integration to Oracle Field Service Cloud). Activity types are synced part of admin data from Oracle Utilities Work and Asset Cloud Service to Oracle Field Service Cloud.

## Properties

Properties enable the integration specific UIs created and map the Oracle Field Service Cloud UI element with a property. Each property is classified into types such as field, integer, enumeration, string on the basis of requirements and should be addressed using this property.

To import the property file included in the accelerator package:

1. On the **Configuration** page, select **Resources, Activities, Inventories > Properties**.



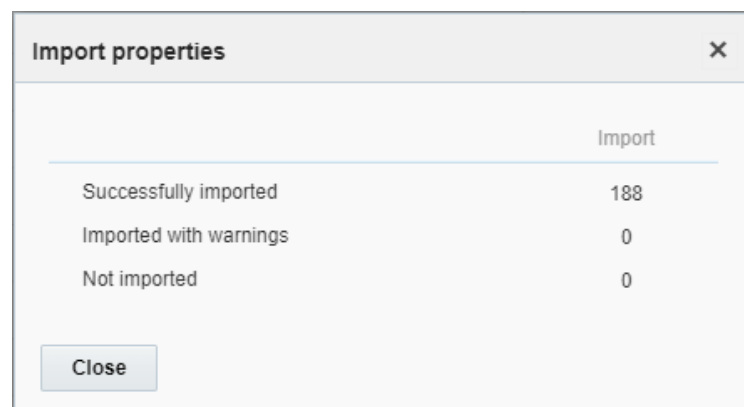
2. Click **Import**.



3. Browse to the location of the file to be imported and click **Import**.



4. Verify the successful import of the file.





## Glossary

Glossary is used for cosmetic changes in label names. This function provides the flexibility to change labels based on the business needs.

To use the glossary function:

1. On the **Configuration** page click **Glossary**.



2. Click **Import** to import the file provided as part of the package.



3. Click **Browse** and select the file. Click **Import**.



Make sure the file imports successfully.

4. As part of the package, the following labels are changed. Change the labels based on the preference.

```
Category (ctg),Identifier (id),Type (tp),ID/Label (lbl),User Types (ut),English (en-US)
"Glossary: mobile_shared, wsp_inventory".glossary.translation,10105,,Assets/Equipment
Glossary: mobile_shared,glossary.translation,10959,,Assets/Equipment
Glossary: mobile_shared,glossary.translation,10767,,Asset/Equipment Details
Glossary: wsp_inventory,glossary.translation,10111,,Existing
"Screen Configuration - Mobility: Edit/View activity","Eae3elfebee180ba040eb3f1b0c011f029fddf5e","layout","list_inventories","CEM
OFSC","Equipment"
"Screen Configuration - Mobility: Edit/View activity","9b0dc924754e5ac57bf15c4e166282c8e3189de","layout","list_inventories","WAM OFSC","Assets"
```

Example: To change the Asset label, change the Asset in the given file. You can add more values to the existing values.

## Forms and Plugins

Plugins are used to make changes to screen and data, based on their type and status of target and parent object. They are also used to enter measurements, record time/materials/equipment used while completing an activity, populate service history information and validate completion information before actually sending the information to verify if the message is accepted by Oracle Utilities Work and Asset Cloud Service.

Plug-ins in Oracle Field Service Cloud perform actions not found in the standard solution. They appear as selectable links on the application. They open a new window, tab, or frame in a browser where an external HTML5 application is executed.

For more information on Oracle Field Service Cloud plugin framework refer to latest Oracle Field Service Cloud documentation at:

<https://docs.oracle.com/en/cloud/saas/field-service/20d/fapcf/overview-of-the-plug-in-api.html#overview-of-the-plug-in-api>


Each plugin contains a JavaScript file that has the main business logic required for functionality of the plugin. The data required for each plugin is available through the properties that are added for the plugin. XML data obtained through properties is parsed and appropriate XSL is applied to it to render each UI.

## Measurement Plugin

Measurements manage the asset operational and runtime data collected and tracked for assets. Asset measurements include mileage, hours of uptime, number of start-stops, and more.

Since they almost entirely depend on the usage of the related asset, readings cannot be calculated or predicted accurately by the system. Instead, readings must be collected and entered into the system, either manually by a user or imported as the result of activity completion.

To import plugins:

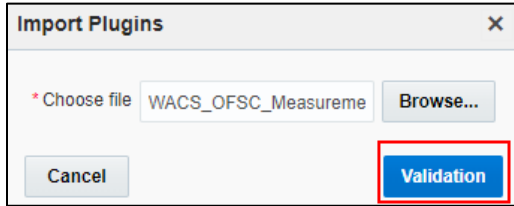
1. Login to OFSC with valid credentials, click on the  icon on left side of the home screen.
2. Navigate to **Configuration > Displays > Forms and Plugins**.



3. Click **Import Plugins**.

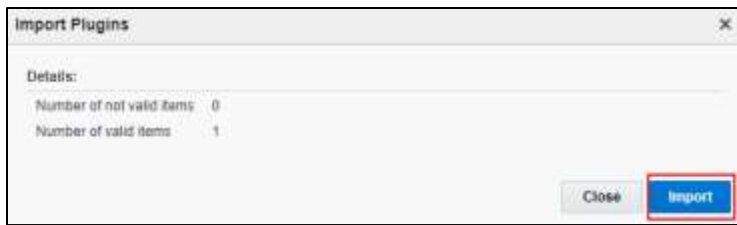


4. On the **Choose file** field, click **Browse** to select measurement plugin. Click **Validate**.

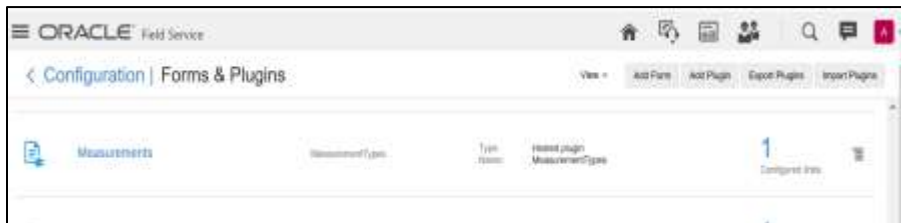


Oracle Field Service Cloud validates the plugin and the number of valid items should be 1.

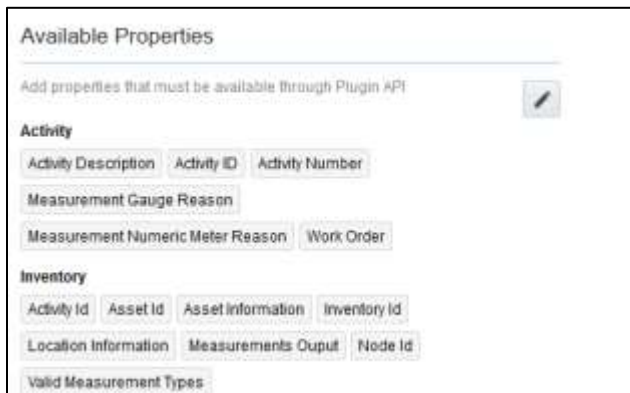
5. Click **Import**.

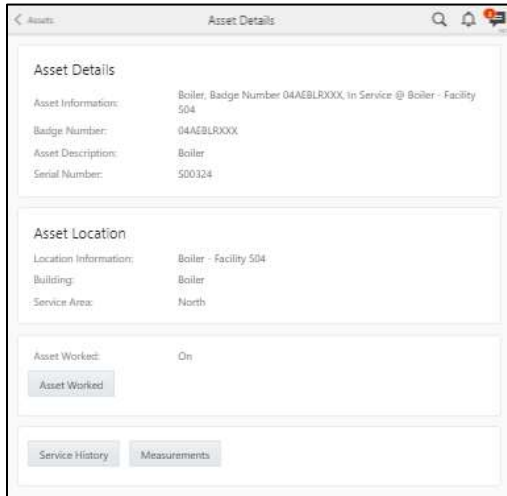


After the successful import of plugin, Oracle Field Service Cloud displays the details as shown below.



6. Make sure the **Available Properties** tab is populated with all properties.






## Resource Usage Plugin

Timesheets are used to record the amount of time that workers (labor resources) spend on activities or work orders. Once charges are entered, processing allows employees to receive proper compensation for their work and labor charges are applied to the appropriate cost buckets.

Generally, only each individual and the person is designated as the supervisor on that individual's crew can access timesheet information for that person.

To import the plugin:

1. Login to Oracle Field Service Cloud with valid credentials, click the  icon on the left of the Home screen.
2. Navigate to **Configuration** page > **Displays**> **Forms and Plugins**.



3. Repeat steps 3 to 5 from [Measurement Plugin](#).

4. Click **Import Plugins** to import the resource usage plugin provided in the package.



5. Select the resource plugin and enter the details:

- URL: OIC integration point URL for the plugin
- OIC\_username/OIC\_password: OIC username/password

Oracle Field Service Cloud users should to configure the following:

- ofsc\_username: clientID@instance ID
- ofsc\_password: client secret key
- ofsc\_bucket: External ID of bucket configured in your environment

**Secure parameters**

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

|               |       |   |
|---------------|-------|---|
| oic_url       | Value | - |
| oic_username  | Value | - |
| oic_password  | Value | - |
| ofsc_username | Value | - |
| ofsc_password | Value | - |
| ofsc_bucket   | Value | - |
|               |       | + |

6. Make sure the **Available Properties** tab is populated with properties shown below.

**Available Properties**

Add properties that must be available through Plugin API

**Activity**

Activity Description | Activity ID | Activity Number | Craft

Crew Shift Type | End | Equipment Type | Job Order

Labor Earning Type | Other Resource Type | Overtime Type

Resource Unit of Measure | SLA End | SLA Start | Start | Time Slot

Traveling Time | WAM Resource Usage Output | Work Order

Work Skill

**Resource**

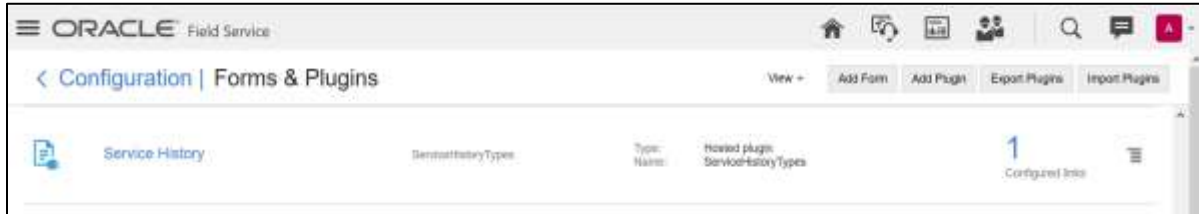
External ID | Name | Resource type | Type

## Service History Plugin

Service history is information regarding some type of service or maintenance performed on an asset. Information typically associated with service history include record inspection feedback, pass/fail details,

downtime, parts failure information, maintenance or service logs, or other information regarding service on the asset.

1. Click **Import Service History Plugin** to import. Navigate to **Configuration** page > **Forms and Plugins**.
2. Repeat steps 3 to 5 from [Measurement Plugin](#).
3. Click **Import Plugins** to import the service history plugin provided in the package.



4. Make sure the **Available Properties** tab is populated with the properties shown below.

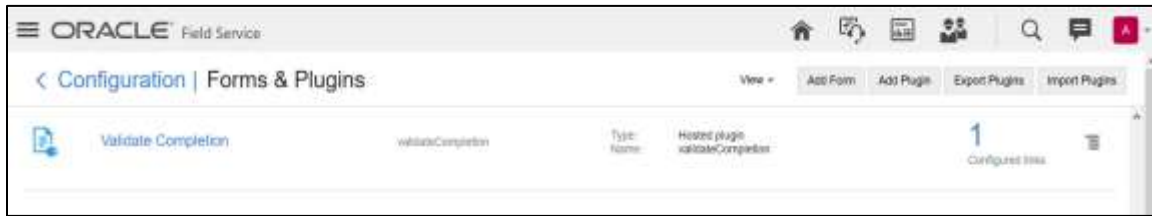


## Validate Completion Plugin

This plugin helps crew to validate the eligibility to the activity to complete. If the activity is not yet eligible, the plugin displays corresponding error message if the eligibility is success so the crew can complete the activity.

1. Navigate to **Configuration** page > **Forms and Plugins**.
2. Repeat steps 3 to 5 from the [Measurement Plugin](#) section.

3. Click **Import Validate Completion Plugin** to import the service history plugin provided in the package.



4. Select the **Validate Completion** plugin and enter the details:

- ofsc\_username: clientID@instance ID
- ofsc\_password: client secret key
- ofsc\_bucket: External ID of bucket configured in your environment

5. Ensure that the **Available Properties** tab is populated with the properties shown below.



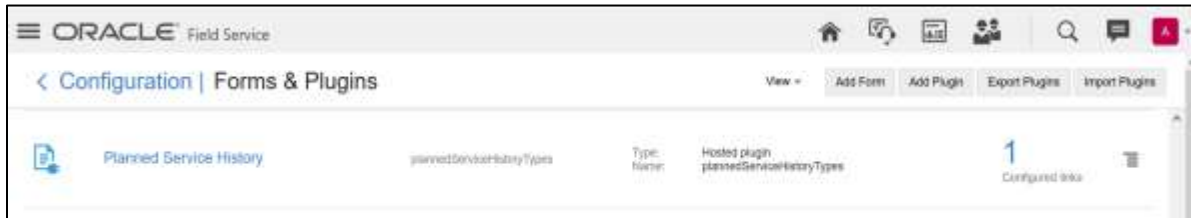
## Planned Service History Plugin

Planned Service history is information regarding some type of service or maintenance performed on an asset. Information typically associated with service history include record inspection feedback, pass/fail details, downtime, parts failure information, maintenance or service logs, or other information regarding service on the asset.

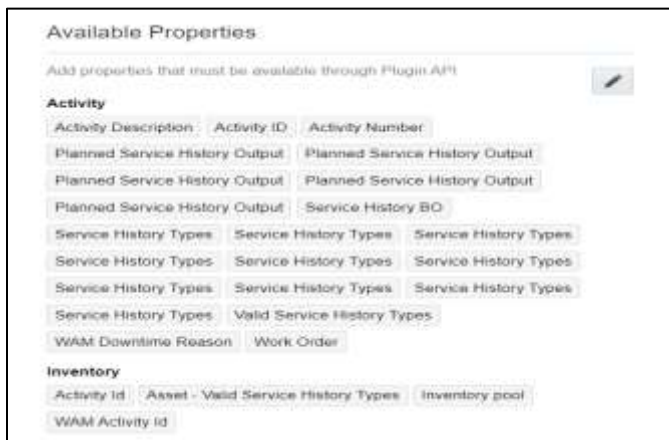
1. Click **Import Planned Service History Plugin**.

To import navigate to **Configuration > Forms and Plugins**.

- Repeat steps 3 to 5 from the [Measurement Plugin](#) section.
- Click **Import Plugins** to import the Planned Service History plugin provided in the package.



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



## Asset Component Install Exchange Undo Plugin

Handle operations on Install, Uninstall and replace actions for the assets and components in a work activity. Information associated with the components used for the assets on completion of the activity is handled.

- Click **Import Asset Component Install Exchange Undo Plugin**.
- To import navigate to **Configuration > Forms and Plugins**.
- Repeat steps 3 to 5 from the [Measurement Plugin](#) section.
- Click **Import Plugins** to import the Planned Service history plugin provided in the package.



- Select the **Asset Component Install Exchange Undo** plugin and enter the details:
  - oic\_url: OIC integration point URL for the plugin
  - oic\_uname/oic\_password: OIC username/password



- ofsc\_multiDay\_act\_ibls: The Activity type of the Multi-Day activity created in OFSC. If there are more than one use '|' separator. Example: Act1|Act2|Act3

6. Make sure the **Available Properties** tab is populated with the properties shown below.

**Available Properties**

Add properties that must be available through Plugin API ✎

**Activity**

Activity Description Activity ID Activity Number Activity Type

Service History Types Service History Types Service History Types

Service History Types Service History Types Service History Types

Service History Types Service History Types Service History Types

Service History Types Work Order

**Inventory**

Activity Id Asset - Valid Service History Types Asset Action Taken

Asset Description Asset Id Asset Information Asset Installed In OFSC

Asset May Be Left In Place Asset Or Component Asset Sequence

Asset Type Asset Worked Attach To Asset Attached To Asset

Attached To Asset Id Badge Number Building Deinstall Status

Effective Date Time Exchanged Inventory Id Failure Information

Inventory Id Inventory Type Item Number Location Information Node Id

Point ID Room Run To Failure Serial Number Service Area

Site Location Valid Measurement Types WAM Activity Id

**Resource**

ID


## Lock Unlock Activity Plugin

Handle operations lock or unlocking of an activity for a crew so that he can work on it.

1. Click **Import Lock Unlock Activity Plugin**.
2. To import navigate to **Configuration > Forms and Plugins**.
3. Repeat steps 3 to 5 from the [Measurement Plugin](#) section.

ORACLE Field Service

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

|   |                      |                    |   |
|---|----------------------|--------------------|---|
|  | Lock Unlock Activity | lockUnlockActivity | Type: HTML5 application<br>URL: https://sic11axf.us.oracle.com:8843/Plugins/QA/WAM-OFSC/LockUnlock/index.html |
|---|----------------------|--------------------|---|

4. Click **Import Plugins** to import the Lock Unlock Activity Plugin provided in the package

## Available Properties

Add properties that must be available through Plugin API



### Activity

Activity ID wam\_lock\_uid wam\_lock\_uname

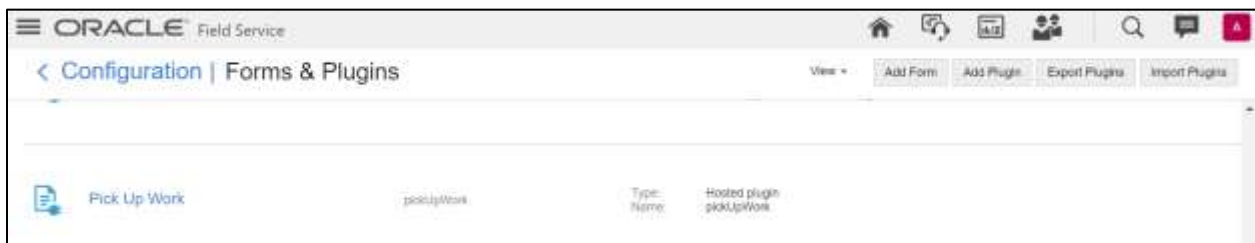
### Resource

External ID ID

## Pick Up Work Plugin

Handles operations lock or unlocking of an activity for a crew so that he can work on it.

1. Click **Import Pick Up Work Plugin**.
2. To import navigate to **Configuration > Forms and Plugins**.
3. Repeat steps 3 to 5 from the [Measurement Plugin](#) section.



4. Click **Import Plugins** to import the Pick Up Work Plugin provided in the package.



## User Types

The user types are used to manage permissions for all the users. 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 user types to create custom screen context layouts for Oracle Work and Asset Cloud Service integration to Oracle Field Service Cloud for utilities by accessing the screen configuration settings in specific user types created.

The user types that are part of this integration are:

- WACS\_OFSC\_Dispatcher\_User\_Type
- WACS\_OFSC\_User\_Type

To setup user types:

**Important!** Make sure to load the Properties, Activity Types, and Plugins before proceeding.

1. Login to Oracle Field Service Cloud.
2. Click  on the **Home** page.
3. Navigate to **Configuration** page > **Users, Security, Integrations** > **User Types**.



4. Click **Import** to import the user types.



5. On the **Choose file** field, click **Browse** to select measurement plugin. Click **Validate**.



6. Click **Import** and verify the import is successful.



7. Import 'WACS\_OFSC\_Dispatcher\_User\_Type'.



After the Dispatcher user type is set up, perform the following:

1. Make sure the Dispatcher user type import is successful without warnings.
2. Navigate to resources search for admin user. Note the user type configured in your environment.
3. Navigate to **Configuration > User types > WAM OFSC Dispatch Administrator**.
4. On the **General** tab, configure the display profile as 'WAM OFSC Dispatch Administrator' and the profile that was configured to admin user.
5. Navigate to **Resources search** for admin and click **Edit**.
6. Set the user type as 'WAM OFSC Dispatch Administrator'.
7. Enter the password and click **Submit**.

Make sure that the **Access** settings are selected for both the user types.

General | Screen configuration | Restrictions and Filters

User type info

\* Label: WAM OFSC

\* Name: WAM OFSC

Active:

Login Policy: Default policy

Access settings

Allow access via web application

Use Legacy Manage for Dispatch operations. This functionality is deprecated and is not recommended for new implementations

Allow access via installed application for Android

Allow access via installed application for iOS

General | Screen configuration | Restrictions and Filters

User type info

\* Label: wam\_ofsc\_dispatch\_administrator

\* Name: WAM OFSC Dispatch Administrator

Active:

Login Policy: Default policy

Access settings

Allow access via web application

Use Legacy Manage for Dispatch operations. This functionality is deprecated and is not recommended for new implementations

Allow access via installed application for Android

Allow access via installed application for iOS

## Chapter 3: Additional OFSC Configurations

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

- [Sync Mobile Control Data Information from WACS to OFSC](#)
- [Organization](#)
- [Work Zones](#)
- [Resource and Bucket Info](#)
- [Outbound Channel](#)
- [UI Validations](#)
- [Checklist](#)

### Sync Mobile Control Data Information from WACS to OFSC

Information from Oracle Utilities Work and Asset Cloud Service has to be replicated to Oracle Field Service Cloud to provide the drop-down information used in the Oracle Field Service Cloud mobile application. Create work skills, work skill properties, and work skill conditions in Oracle Field Service Cloud to match activities with resources and for crew tracking.

As part of this accelerator, Oracle Utilities WACS OFSC Admin Data Sync deployed on Oracle Integration Cloud (OIC) is provided to create these configurations automatically making migration of data easier and get rid of tedious manual work.

Oracle Utilities WACS OFSC Admin Data Sync needs to be run on initial installation or on a need to basis when new control data from Oracle Utilities Work and Asset Cloud Service or work skill related configurations needs to be created or updated in Oracle Field Service Cloud.

This sync integration process is manually run in OIC by scheduling the integration process to run on a scheduled date or selecting **Submit Now** from the menu of the activated sync integration process to initiate an instance of the integration. An optional language parameter can be entered, it should be an ISO 2 letter language code, to determine the description to retrieve from Oracle Utilities Work and Asset Cloud Service and in what language code the property name should be created in Oracle Field Service Cloud. If the language is not populated or blank, it is defaulted to English (en).

Refer to the Business Flows chapter in *Oracle Utilities Work and Asset Management Integration to Oracle Field Service Cloud Configuration Guide* at [https://docs.oracle.com/cd/F35859\\_01/index.htm](https://docs.oracle.com/cd/F35859_01/index.htm).

The following configurations are created/updated by the Sync Process:

- Create/update the enumeration values of the Oracle Field Service Cloud properties.

| OFSC Property label | Synced WACS Information |
|---------------------|-------------------------|
| wam_craft           | Craft                   |
| wam_crew_shift_type | Crew Shift Type         |
| wam_downtime_reason | Downtime Reason         |

| OFSC Property label          | Synced WACS Information  |
|------------------------------|--------------------------|
| wam_equipment_type           | Equipment Type           |
| wam_labor_earning_type       | Labor Earning Type       |
| wam_measurement_gauge_reason | Measurement Gauge Reason |
| wam_measurement_meter_reason | Measurement Meter Reason |
| wam_other_resource_type      | Other Resource Type      |
| wam_overtime_type            | Overtime Type            |
| wam_resource_uom             | Unit of Measure-Resource |

To verify the information synced from Oracle Utilities Work and Asset Cloud Service to Oracle Field Service Cloud, navigate to the respective property and check the enumeration values. Click **Modify**.

**NOTE:**

- After a resource is created in Oracle Utilities Work and Asset Cloud Service, the resource code (craft code, equipment code and other resource code) cannot be changed. The sync integration process uses these resource codes to create the enumeration values for equipment type, craft and other resource type property in Oracle Field Service Cloud. Slash (/) should not be included in the resource code.
- The sync integration process cannot delete enumeration values added to a property in Oracle Field Service Cloud; the OFSC REST API that updates the enumeration values of a property does not allow it. The only way to delete an enumeration value(s) in a property is by deleting the property, recreate the property and run the sync to get the latest values.

- Work Skill Related Configurations
  - A work skill is created in Oracle Field Service Cloud for each craft synced from Oracle Utilities Work and Asset Cloud Service. Work skill is a job-specific skill and is used as a criteria to match activities with the resources. The label format for Work Skill created in Oracle Field Service Cloud is:
    - **W\_** + WACS craftcode
    - Example: Work Skill created in Oracle Field Service Cloud

The screenshot shows a web form titled "Edit work skill: 'Carpenter'". The form contains the following fields and controls:

- Name:** (empty text field)
- English:** Text input field containing "Carpenter".
- SpanishLA:** Text input field (empty).
- Portuguese (Brazil):** Text input field (empty).
- Label:** Text input field containing "W\_Carpenter".
- Sharing of the skill in teamwork:** A dropdown menu set to "Summary" with a checkmark icon to its right.
- Active:** A checkbox that is checked.

- A work skill property on the activity level is created in Oracle Field Service Cloud for each craft synced from Oracle Utilities Work and Asset Cloud Service. This property will contain information about how many people with the particular work skill is needed for the activity. The label format for Work Skill property created in Oracle Field Service Cloud is:

- **W\_ + WAM craftcode + \_Nd**  
Example: Work Skill Property created in OFSC

**Modify Property**

Property type: String

\* Property name

\* English: Carpenter needed

SpanishLA:

Portuguese (Brazil):

\* Property Label: W\_Carpenter\_Nd

Property hint

English:

SpanishLA:

Portuguese (Brazil):

Entity: Activity

Regular expression:

\* Lines count: 1

GUI: Text element

Close property data on Reopen or Prework:

- Work Skill Conditions are created in Oracle Field Service Cloud based on the craft and the configuration property value of workSkillCond.actvtySameSkillMaxWorker.default obtained from WAMOFSC\_ConfigProps lookup defined in Oracle Integration Cloud. This configuration property value contains the maximum number of people with the same work skill allowed to work simultaneously in an activity.

In this example: For work skill = Carpenter and workSkillCond.actvtySameSkillMaxWorker.default = 3, these are the work skill conditions created.

Example: Work Skill Conditions created for Work Skill Carpenter in OFSC

|                          |  | Work skill conditions |                |        |                       |         |
|--------------------------|--|-----------------------|----------------|--------|-----------------------|---------|
|                          |  | ID                    | Name           | Status | Work skill conditions | Actions |
| <input type="checkbox"/> |  | 10880                 | Carpenter(1/1) | ✓      | Carpenter needed In 1 | Modify  |
| <input type="checkbox"/> |  | 10881                 | Carpenter(2/2) | ✓      | Carpenter needed In 2 | Modify  |
| <input type="checkbox"/> |  | 10882                 | Carpenter(3/3) | ✓      | Carpenter needed In 3 | Modify  |



These configuration are used to track teams (crews) consisting of people with different work skills and make sure that activities that require several people simultaneously is assigned to the right team.

## 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:

1. Navigate to the **Configuration** page and click **Organization**.
2. Click **Add New** to add a new organization.



3. Enter the name of the organization and click **Submit** to save the details.

A screenshot of the 'Edit Organization' form. The form has a title bar with 'Edit Organization' and a close button (X). It contains several input fields: '\* English' with the value 'Sunrise Utilities', 'Portuguese (Brazil)', 'SpanishLA', '\* Label' with the value 'Sunrise Utilities', and 'Type' with a dropdown menu set to 'In-house'. At the bottom of the form, there are two buttons: 'Discard changes' and '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 Work and Asset Cloud Service.

To add 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 |
|----|--------|-------------------|----------------------------|---------|--------|
| 1  | ✓      | ALTAMONTE SPRINGS | 32701, 32714, 44702, 44720 | Modify  | Shape  |
| 14 | ✓      | ANAHEIM           | 92832, 92836, 92907        | Modify  | Shape  |

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

\* Work zone name: Stark  
 \* Work zone label: Stark  
 Status: Active  
 Delimiter: new line  
 Travel Area: Sunrise Ente  
 Work Zone Keys: 32704, 44720

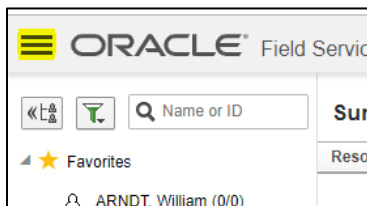
- Click **Add** to save the new work zone.

## Resource and Bucket Info

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 Work and Asset Cloud Service.

To create resources in the bucket:

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



- Click **Resource & Bucket Info**.
- Click **Add Child**.

**Resource & Bucket Info > Sunrise Cable** Add Child Resource History

**Resource Information**

External ID: Cable Credence

Name: Sunrise Utilities

Status: Active

Resource type: Group

Organization: Sunrise Utilities

Time zone: Eastern

Time format: 24-hour

Date format: mm/dd/yy

**Work Skills**

Work Skills: +

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

**New Resource, Bucket, or Group Info**

Name

External ID

Status: Active

Email address Write

Phone Call

Time format: 24-hour

Date format: mm/dd/yy

Resource type: **Bucket**

Organization: Sunrise Utilities

Credence

Close OK

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

**Add Work Skills**

Number of Skills: 1

Carpenter

Commercial

Electric

Estimate

Meter Services

Ops and Maintenance

Residential

Date From: 12/13/19 Date To:

Close Save

## Outbound Channel

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

To add a communication channel:

1. Navigate to the **Configuration** page > **Subsystems** > **Outbound Integration** icon.



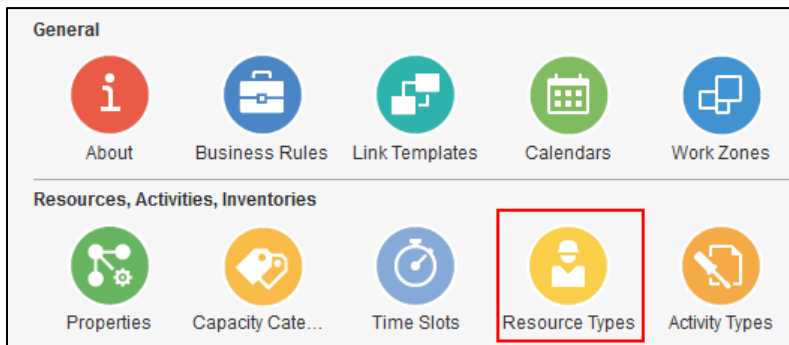
2. Click **Add channel**. Enter the required details and click **OK**.



## Crew Configuration

To configure a crew:

1. Navigate to **Configuration** page and click **Resource Types**.



2. Click **Add Resource Type**.



3. Enter the required details and make sure the crew has 'PR' as the label. Save the record.

The screenshot shows the 'Edit Resource Type' form. It is divided into two main sections: 'Resource Type Info' and 'Features'.  
In the 'Resource Type Info' section, there are fields for 'Name' (English: Technician, SpanishLA: , Portuguese (Brazil): Técnico), 'Label' (PR), and 'Active' (checked).  
In the 'Features' section, there is a 'Role' dropdown set to 'Field resource' and several checkboxes: 'Resource is a Contingent Worker' (unchecked), 'Resource can participate in team' (checked), 'Resource can be a teamholder' (checked), 'Share inventory in teamwork' (unchecked), 'Share geolocation in teamwork' (unchecked), 'Share work skills in teamwork (team-member only)' (unchecked), 'Used for Quote management' (checked), 'Routing can assign activities' (checked), and 'Enable 'Not activated in time' alert and trigger' (checked).  
Below the features is the 'Load threshold' section, which includes a 'Units of measurement' dropdown set to 'number of activities', and two rows for 'Full load' and 'Empty' with input fields for '10' and '0' respectively.

*Adding Crew and Crew Member*

To create resources for the crew member and crew itself:

1. Navigate to the **Configuration page > Resources, Activities, Inventories > Resource Types**.



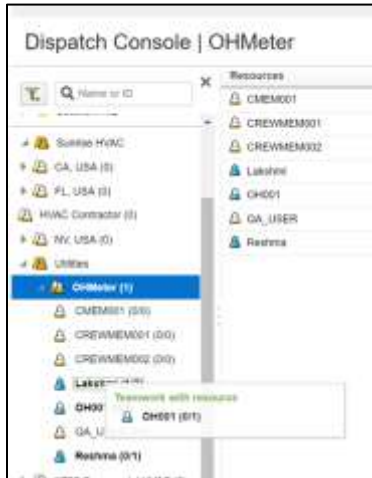
2. Click on **Add Resource Type**.
3. Populate the required information and click **Add**.

4. Repeat steps 2 and 3 to create resource types for crew members.

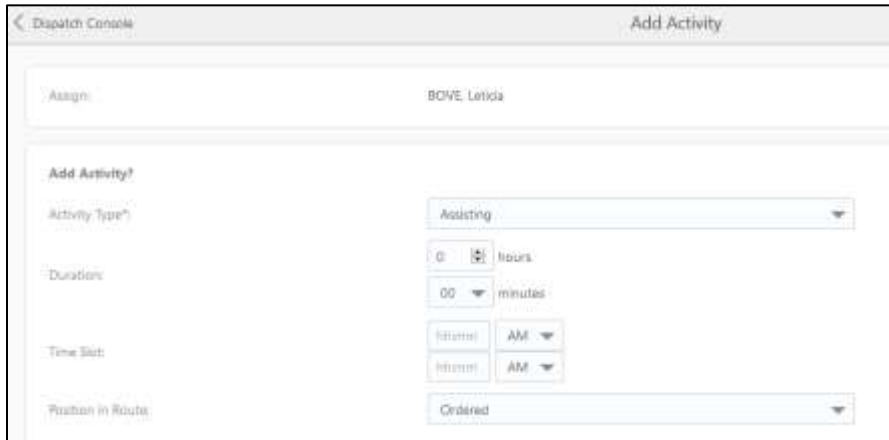
### *Assigning Resources*

To add multiple resources to a crew so that they can assist it in the completion of work:

1. Navigate to the **Activities** page and observe various resources.
2. Drag and drop the resources to the crew so as they can assist.



3. Upon successful drag and drop, add activities to the crew.



4. Populate the required information and click **Submit**.

## Offline vs Online Mode

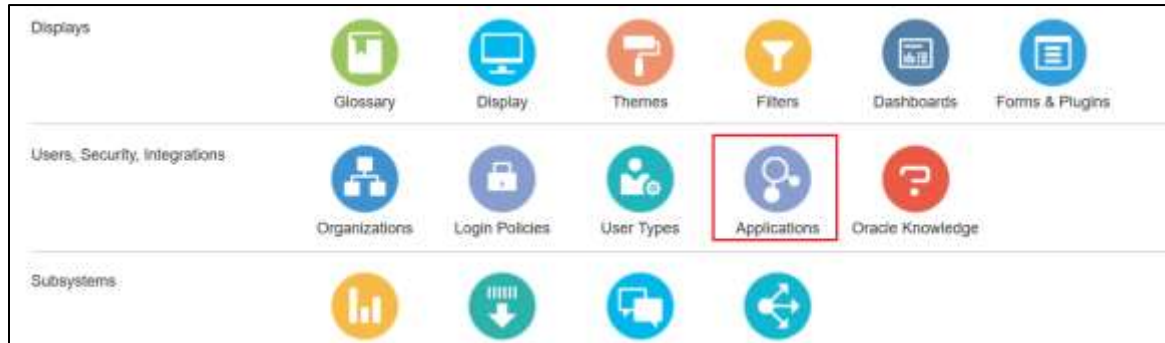
When the crew is enroute to perform an activity in the field there is a possibility that the location does not have network (offline mode); if the network exists, the mode is online. When online, crew can perform the work, validate the completion of the activity, and submit the activity for completion. But, when offline, though the crew can validate and complete the activity, this completion information will be synched to server and message is sent out of Oracle Field Service Cloud only when it comes online.

**Note:** No offline support is currently provided when adding attachments to a service history. If crew time is entered offline, supervisor has to open the **Resource Usage** page when online before going offline. This ensures all relevant crew member information needed is available on local storage before going offline. Timesheets can then be entered in offline mode as well.

## Crew Time

As part of the crew time sheet functionality, from the plugin, there is an invocation call to OFSC REST API to configure the crew members under Crew. To call OFSC REST API from the plugin, set up cross-origin resource sharing (CORS) in Oracle Field Service Cloud as follows:

1. Navigate to **Configuration > Application > Additional Resources**.



2. Select **Allow Cross-origin resource sharing (CORS)** from the following web domains and provide the Oracle Field Service Cloud domain.

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



## Inventory Types

The inventory types (such as asset, material, etc) are stored in Oracle Field Service Cloud.

To add an inventory type:

1. Navigate to **Configuration > Inventory Types**. Click **Add New**.



Configuration Inventory Types

[Add New](#)

| ID | Name                         | Label | Unit | Model Property | Status | Non-serialized |
|----|------------------------------|-------|------|----------------|--------|----------------|
| 1  | 2T Tower A/C                 | MT    |      | Model          | ✓      |                |
| 2  | Flexion P2013 4.3 Tablet Win | DT    |      | Model          | ✓      |                |
| 3  | Common 45.000 BTU Furnace    | AT    |      | Model          | ✓      |                |
| 4  | 32 The Model (WV Model)      | TS    |      | Model          | ✓      |                |

2. Enter the details as shown below and click **Save**.

\* Label

Active

Non Serialized

Model Property

\* Name

\* English

SpanishLA

Portuguese (Brazil)

3. Repeat step 2 for material and equipment.

\* Label

Active

Non Serialized

Model Property

\* Name

\* English

SpanishLA

Portuguese (Brazil)

\* Label

Active

Non Serialized

Model Property

\* Name  Unit of Measurement

\* English  \* English

SpanishLA  SpanishLA

Portuguese (Brazil)  Portuguese (Brazil)

## Checklist

Before proceeding to chapter 4, verify if the following activities are complete.

- All the Activity Types specific to customer are created
- Properties are imported
- User Types are imported
- Plugins are configured
- Make sure the quota is allocated and need not be configured
- Name of the organization
- Sync information from Oracle Utilities Work and Asset Cloud Service to Oracle Field Service Cloud
- Work Skills are created
- Name of the resources, work zones
- Inventory Types are created
- Details of Oracle Integration Cloud used to create the outbound channel

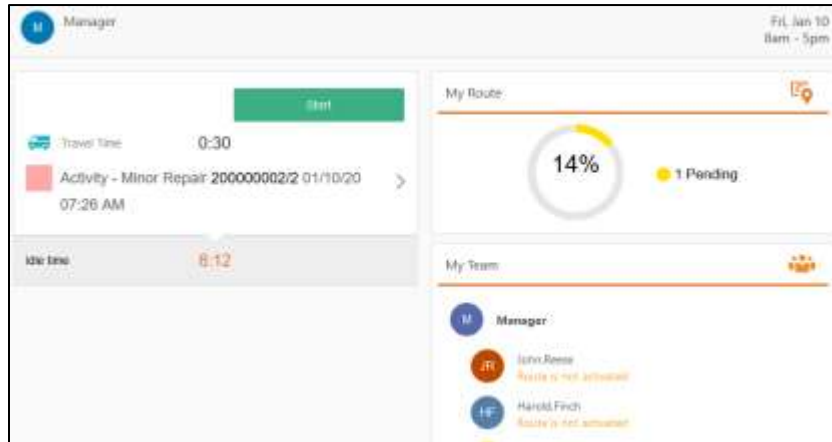
## Chapter 4: User Operations

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 the activities in the queue of the worker.
3. Click **Start** to start the activity in the worker's queue.



4. Enter the **Work Activity Number** and click **Submit**.



5. To enter the activity details:
  - a. Click the activity. On the **Activity Details** page, click **Assets**.

Activity Details (08/20/20)

Activity Details

|                         |  |
|-------------------------|--|
| Work Order Description: | IT Exec WO AI  |
| Activity ID:            | 402212   |
| Activity Number:        | 2000002/33   |
| Activity Type:          | Activity - Minor Repair  |
| Activity Status:        | Started  |
| Description:            | IT Exec WO AI  |
| Location Information:   | INT002 Generator   |
| Asset Information:      | Generator - Tracked, 93181881311, GEN-001, Generator, Wind Tower |
| Emergency Indicator:    | No   |
| Severity Information:   | System, English  |
| Total Risk Priority:    | 15   |
| Duration:               | 46 minutes   |

Quick Links

Assets Resources Planned Service History Resource Usage

b. Oracle Field Service Cloud displays all assets attached to this activity. Select the required asset to view the asset information.

Assets/Equipment

Existing 1

INT\_WAM\_OFSC\_ASSETTYPE\_5\_16Sep01\_8\_16Sep01 INT\_WAM\_OFSC\_LocationType, INT-WAM\_OFSC\_LocationMadhapur, G1, 906, Ayyappa Society, 44685, USA, Time Zone: US Pacific Time Asset

Asset Details

|                    |  |
|--------------------|--|
| Asset Information: | Generator - Tracked, 93181881311, GEN-001, Generator, Wind Tower |
| Barcode Number:    | GEN-001  |
| Asset Description: | Generator - Tracked  |
| Serial Number:     | 93181881311  |

Asset Location

|                       |                  |
|-----------------------|------------------|
| Location Information: | INT002 Generator |
| Run To Release:       | WTRD             |

Asset Worked: Yes

Asset Worked

Uploaded Attachments

Quick Links

Service History Measurements

6. To enter the service history details:
  - a. Click **Service History** on the **Assets** page.
  - b. From the list of service histories that are part of the activity, select '+' next to the specific service history to add the required details.

The screenshot shows a web interface for service history. At the top, there is a header with the following information:

- Activity Information: 200000002/2 - PP\_WO2
- Asset Information: Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
- Asset Location Information: Pump 2, RAS, Middle

Below the header is a section titled "Service History List" with a sub-tab "Entered". On the left, there is a list of service history types:

- General SH**: Required: Yes, Entered: 0. A red box highlights a "+" icon to its right.
- Downtime**: Required: No, Entered: 0. A "+" icon is to its right.
- Failure**: Required: No, Entered: 0. A "+" icon is to its right.

The "Entered" pane on the right is empty and contains the text "No items to display".

- c. Click **Complete**. The service histories are displayed in the **Entered** pane.

This screenshot is similar to the previous one, but the "Entered" pane now contains one item:

- General SH**: Status: COMPLETED. A red box highlights this entry.

The "+" icons next to the service history types in the list are still visible.

**Note:** Crew can also save the service history in 'pending' state. Click **Save**. The pending service histories are displayed in the **Entered** pane with the 'pending' status.

### General SH

|                            |   |
|----------------------------|---|
| Asset Information          | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Asset Location Information | Pump 2, RAS, Middle   |
| Effective Date/Time        | 2020-01-10T18:00:20   |

Service History Comments

Save
Complete
Dismiss

|                            |   |
|----------------------------|---|
| Activity Information       | 200000002/2 - PP_WO2  |
| Asset Information          | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Asset Location Information | Pump 2, RAS, Middle   |

**Service History List**

|   |   |
|---|---|
| General SH<br><small>Required: Yes<br/>Entered: 2</small> | + |
| Downtime<br><small>Required: No<br/>Entered: 5</small>    | + |

**Entered**

|  |   |
|--|---|
| General SH<br><small>Status: COMPLETED</small> | ✎ |
| General SH<br><small>Status: PENDING</small>   | ✎ |

- d. To complete a service history in 'pending' status:
- i. Click **Edit** to edit a specific service history.

|                            |   |
|----------------------------|---|
| Activity Information       | 200000002/2 - PP_WO2  |
| Asset Information          | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Asset Location Information | Pump 2, RAS, Middle   |

**Service History List**

|   |   |
|---|---|
| General SH<br><small>Required: Yes<br/>Entered: 2</small> | + |
| Downtime<br><small>Required: No<br/>Entered: 5</small>    | + |

**Entered**

|  |   |
|--|---|
| General SH<br><small>Status: COMPLETED</small> | ✎ |
| General SH<br><small>Status: PENDING</small>   | ✎ |

- ii. Click **Attach** to attach images of various artifacts.

|  |   |
|--|---|
| Asset Information  | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Asset Location Information   | Pump 2, RAS, Middle   |
| Effective Date/Time  | 2020-01-10T17:57:23   |
| Service History Comments   | <div style="border: 1px solid #ccc; height: 80px;"></div>                             |
| <input type="button" value="Save"/> <input type="button" value="Complete"/> <input type="button" value="Delete"/> <input type="button" value="Attach"/> <input type="button" value="Dismiss"/> |   |

iii. Browse and select the file to attach. Click **Upload**.

|  |   |
|--|---|
| Attach   | <input type="button" value="Browse..."/> OIC.JPG          |
| Comments   | <div style="border: 1px solid #ccc; height: 80px;"></div> |
| <input type="button" value="Upload"/> <input type="button" value="Dismiss"/> |   |

iv. Click **Complete**.

| General SH   |   |
|--|---|
| Asset Information  | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Asset Location Information   | Pump 2, RAS, Middle   |
| Effective Date/Time  | 2020-01-10T17:26:12   |
| Service History Comments   | Repaired  |
| <input type="button" value="Save"/> <input type="button" value="Complete"/> <input type="button" value="Dismiss"/> |   |

The completed service histories are displayed in the **Entered** pane. The number of times the service history was edited is also shown.

|                            |   |
|----------------------------|---|
| Activity Information       | 200000002/2 - PP_W02  |
| Asset Information          | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Asset Location Information | Pump 2, RAS, Middle   |

Service History List
Entered

|  |   |  |   |
|--|---|--|---|
| <b>General SH</b><br>Required: Yes<br>Entered: 2 | + | <b>General SH</b><br>Status: COMPLETED | ✎ |
| <b>Downtime</b><br>Required: No<br>Entered: 0    | + | <b>General SH</b><br>Status: COMPLETED | ✎ |

- e. Populate the details for required service histories.
  - f. Make sure the service histories that are marked as 'Required: Yes' have at least one entry.
  - g. Click **Asset Details** to navigate back to the **Asset Details** page.
7. To enter measurement details:
- a. Click **Measurement**.

Assets
Asset Details

|                      |   |
|----------------------|---|
| <b>Asset Details</b> |   |
| Asset Information    | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Badge Number         | PP002   |
| Asset Description    | Pump - Singlestage, Centrifugal   |
| Serial Number        | PP002   |

|                       |                     |
|-----------------------|---------------------|
| <b>Asset Location</b> |                     |
| Location Information  | Pump 2, RAS, Middle |
| Building              | RAS Pumping         |
| Service Area          | North               |

|              |    |
|--------------|----|
| Asset Worked | On |
|--------------|----|

Service History
Measurements

- b. Click + on the **Measurement Mobility** page.

|                            |   |
|----------------------------|---|
| Activity Information       | 200000002/2 - PP_W02  |
| Asset Information          | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Asset Location Information | Pump 2, RAS, Middle   |

Measurements
+

No items to display.

Asset Details
Activity Details



c. Enter the required measurement details and click **Save**.

|                            |   |
|----------------------------|---|
| Asset Information          | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Asset Location Information | Pump 2, RAS, Middle   |
| Measurement Type           | Gallons Flow  |
| Reading DateTime           | 2020-01-10T18:24:26   |
| Reading                    | 1   |
| Reason                     | Planned   |

**Save** Dismiss

The measurement is displayed in the list.

|                            |   |
|----------------------------|---|
| Activity Information       | 200000002/2 - PP_WO2  |
| Asset Information          | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Asset Location Information | Pump 2, RAS, Middle   |

### Measurements

|              |   |            |
|--------------|---|------------|
| Gallons Flow | Reading DateTime: Jan 10, 2020 at 6:24 PM | Reading: 1 |
|--------------|---|------------|

Asset Details Activity Details

d. Click the edit icon to edit the measurement. You can enter multiple measurements.

e. Click **Activity Details** to navigate back to the **Activity Details** page.

8. To enter resource usage details:

a. Click **Resource Usage** on the **Activity Details** page.

|                        |   |
|------------------------|---|
| Work Order Description | PP_WO2  |
| Activity Number        | 200000002/2   |
| Activity Type          | Activity - Inspection/Repair External   |
| Description            | PP_WO2  |
| Detailed Description   | PP_WO2  |
| Location Information   | Pump 2, RAS, Middle   |
| Asset Information      | Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |
| Emergency Indication   | No  |
| Requester Information  | Herrala 'WAM v2206 DEMO', Kimberley   |
| Total Risk Priority    | 42  |
| Requested By Date      | 2020-01-27  |
| Duration               | 48 minutes  |
| Remaining Time         | 1 minutes   |

b. Enter time sheets, equipment, and other details.

Crew can enter individual timesheets (highlighted in purple) or for team (highlighted in yellow).

Activity Information 200000002/2 - PP\_WO2

**TimeSheet**  

No items to display.

**Equipment** 

No items to display.

**Other** 

No items to display.

Activity Details

c. Click the '+' icon of multiple crew timesheet (highlighted in yellow above).

d. Enter the required information and click **Save**.

Activity Information 200000002/2

Employee Information Manager

Date 01 / 10 / 2020

Regular/Overtime Regular

Crew Shift Type Day Shift

Labor Earning Type Regular

Hours 1

Work Started 2020-01-10T07:26:00

Work Stopped 2020-01-10T08:26:00

Travel Time HH: 0 MM: 1






| Employee      | Craft       |                                     | Add |
|---------------|-------------|-------------------------------------|-----|
| Manager       | Carpenter   | <input checked="" type="checkbox"/> |     |
| John,Reese    | Electrician | <input checked="" type="checkbox"/> |     |
| Harold,Finch  | Inspector   | <input checked="" type="checkbox"/> |     |
| Chandra Perni |             | <input type="checkbox"/>            |     |

Save Dismiss

The timesheets for each crew member are created in 'pending' status.

Activity Information 200000002/2 - PP\_WO2

**TimeSheet**

|   |   |
|---|---|
| 1 Hours , Jan 10,2020<br>User: Manager<br>Status: Pending       |  |
| 1 Hours , Jan 10,2020<br>User: John,Reese<br>Status: Pending    |  |
| 1 Hours , Jan 10,2020<br>User: Harold,Finch<br>Status: Pending  |  |
| 1 Hours , Jan 10,2020<br>User: Chandra Perni<br>Status: Pending |  |
| 1 Hours , Jan 10,2020<br>User: Chandra Perni<br>Status: Pending |  |

**Equipment**

No items to display.

e. Click the **Edit** icon and complete the timesheet.

Activity Information 200000002/2

Employee Information John,Reese

Date 01 / 10 / 2020

Regular/Overtime Regular

Crew Shift Type Day Shift

Labor Earning Type Regular

Craft

Hours 1

Work Started 2020-01-10T07:26:00

Work Stopped 2020-01-10T08:26:00

Travel Time HH: 0 MM: 1

Save **Complete** Delete Dismiss

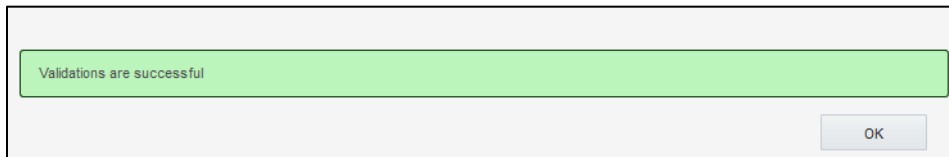
f. Complete the timesheets for all other crew members.

| Activity Information   | 200000002/2 - PP_WO2 |
|--|----------------------|
| TimeSheet  |                      |
| Electrician , 1 Hours , Jan 10,2020<br>User: Manager<br>Status: Completed      | ✓                    |
| Carpenter , 1 Hours , Jan 10,2020<br>User: John,Reese<br>Status: Completed     | ✓                    |
| Carpenter , 1 Hours , Jan 10,2020<br>User: Harold,Finch<br>Status: Completed   | ✓                    |
| Electrician , 1 Hours , Jan 10,2020<br>User: Chandra Pemi<br>Status: Completed | ✓                    |
| Electrician , 1 Hours , Jan 10,2020<br>User: Chandra Pemi<br>Status: Completed | ✓                    |

- g. Populate entries for equipment and other.
- h. Navigate back to the **Activity Details** page after populating all the required resource details.
- i. Click **Validate Completion** to verify the eligibility of the activity to complete.

| Validate Completion     | Resource Usage   | Adjust Time | Hot Data | Suspend | Map | Best Activity | Weekly Activities | Material Tracking | Knowledge |
|-------------------------|--|-------------|----------|---------|-----|---------------|-------------------|-------------------|-----------|
| <b>Activity Details</b> |  |             |          |         |     |               |                   |                   |           |
| Work Order Description: | PP_WO2   |             |          |         |     |               |                   |                   |           |
| Activity Number:        | 20000002/2   |             |          |         |     |               |                   |                   |           |
| Activity Type:          | Activity - Inspection/Repair (Internal)  |             |          |         |     |               |                   |                   |           |
| Description:            | PP_WO2   |             |          |         |     |               |                   |                   |           |
| Detailed Description:   | PP_WO2   |             |          |         |     |               |                   |                   |           |
| Location Information:   | Pump 2, RAS, Middle  |             |          |         |     |               |                   |                   |           |
| Asset Information:      | Pump - Singlestage Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle |             |          |         |     |               |                   |                   |           |
| Diagnosis Indicator:    | No   |             |          |         |     |               |                   |                   |           |
| Requester Information:  | Henala WKM #222 DDHC, Kimberley  |             |          |         |     |               |                   |                   |           |
| Tag Risk Priority:      | 42   |             |          |         |     |               |                   |                   |           |
| Required By Date:       | 2020-01-27   |             |          |         |     |               |                   |                   |           |
| Duration:               | 45 minutes   |             |          |         |     |               |                   |                   |           |
| Traveling Time:         | 1 minutes  |             |          |         |     |               |                   |                   |           |

- j. If all activities are eligible for activity completion, the following message is displayed. Click **OK**.



- k. On the **Activity Details** page, click **Complete**.

| Activity Details       |   |
|------------------------|---|
| Work Order Description | PP_WO2  |
| Activity Number        | 00000000/2  |
| Activity Type          | Activity - Inspection/Repair (External)   |
| Description            | PP_WO2  |
| Detailed Description   | PP_WO2  |
| Location Information   | Pump 2, RAS Middle  |
| Asset Information      | Pump - Singlestage, Centrifugal, Badge Number PPO2, In Service @ Pump 2, RAS Middle |
| Emergency Indicator    | No  |
| Requester Information  | Henrik WAH v2204 DEVAO: Kimberly  |
| Total Risk Priority    | 42  |
| Requested By Date      | 2020-01-27  |
| Duration               | 48 minutes  |
| Traveling Time         | 1 minutes   |

The completion information is sent to Oracle Utilities Work and Asset Cloud Service and the activity is completed.

## 9. To perform Asset Installs and Removals:

### Install Asset:

- a. Start the activity.
- b. To **install** an asset, click on the location.

| Assets/Equipment   |   |
|--|---|
| Existing   | 4 |
| Asset  | 4 |
| 4B Scanner Air Fan   | 1 |
| Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1                                   | 1 |
| Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4                 | 1 |
| Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 | 1 |


- c. Click **Install Asset**.

| Install Asset         |                    |
|-----------------------|--------------------|
| Follow Up Work        |                    |
| Asset Location        |                    |
| Location Information: | 4B Scanner Air Fan |
| Building:             | Boiler             |
| Service Area:         | North              |

- d. Give the **Badge Number** of the Asset to be installed on this location, and click **Search and Add**.

|  |  |
|--|--|
| Asset Operation:   | Attach Component   |
| Activity Information:  | 200000037/17   |
| Main Asset Information:  | Fan - Centrifugal; Badge Number 4053_4APRI_FAN, In Service @ 4A Primary Air Fan                          |
| Effective Date Time*:  | 11/16/2020 05:38:51 PM  |
| Badge Number*:   | <input type="text"/>    |
| <input type="button" value="Search And Add"/> <input type="button" value="Dismiss"/> |  |

e. The newly installed asset is shown in the **Installed pool**.

| Assets/Equipment   |                 |  |
|--|-----------------|---|
| Existing 3   |                 |   |
| Asset 3  |                 |   |
| Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1               | Asset           | 1   |
| Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4                 | Asset           | 1   |
| Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 | Asset           | 1   |
| Installed 1  |                 |   |
| Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan        | Asset Installed | 1   |

**Attach Component:**

- a. Start the activity.
- b. To **attach** a component, click the asset.

Assets/Equipment

Existing 3

Asset 3

|   |   |
|---|---|
| Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1<br>Capacitor 3 - Bus 1 <a href="#">Asset</a>               | 1 |
| Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW<br>Plant 4 <a href="#">Asset</a>                 | 1 |
| Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template<br>Capacitor 12 - Lake Substation Bus 1 <a href="#">Asset</a> | 1 |

Installed 1

|  |   |
|--|---|
| Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B<br>Scanner Air Fan <a href="#">Asset Installed</a> | 1 |
|--|---|

c. Click **Attach**.

Remove Out of Service **Attach Component** Replace Follow Up Work

Asset Details

|                    |  |
|--------------------|--|
| Asset Information: | Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 |
| Badge Number:      | 4053_4APRI FAN_1   |
| Asset Description: | Fan - Centrifugal  |
| Serial Number:     | S00054   |

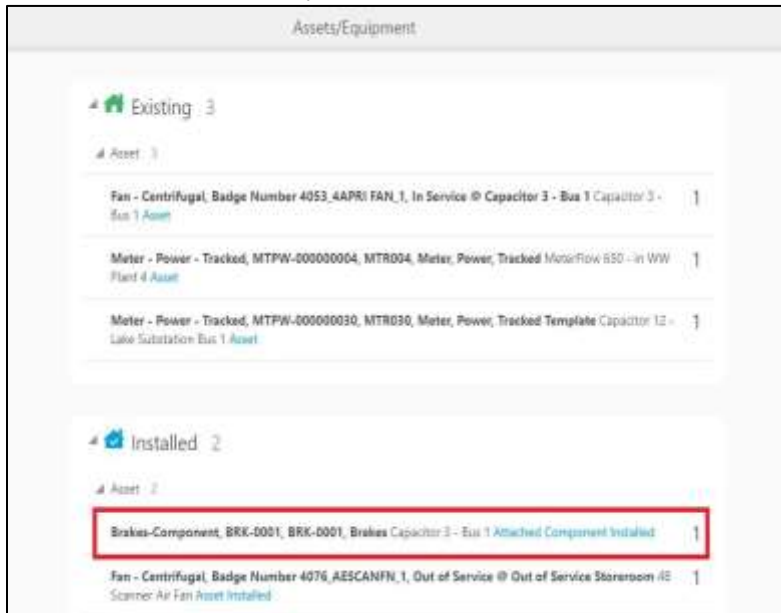
d. Enter the **Badge Number** of the Component to be attached and click **Search and Add**.

|                         |   |
|-------------------------|---|
| Asset Operation:        | Attach Component  |
| Activity Information:   | 200000037/17  |
| Main Asset Information: | Fan - Centrifugal, Badge Number 4053_4APRI_FAN, In Service @ 4A Primary Air Fan |

|                       |                        |  |
|-----------------------|------------------------|--|
| Effective Date Time*: | 11/16/2020 05:38:51 PM |  |
| Badge Number*:        | BRK-00101              |  |

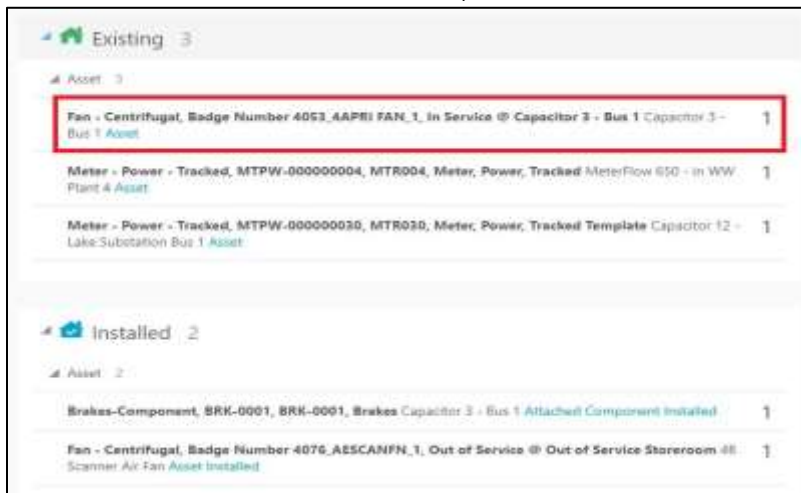
**Search And Add** Dismiss

The attached component is shown in the **Installed Pool**.



**Out of Service:**

- a. Start the activity.
- b. To move an asset **out of service**, click the asset.



- c. Click **Out of Service**.



Remove **Out of Service** Attach Component Replace Follow Up Work

---

**Asset Details**

Asset Information: Fan - Centrifugal, Badge Number 4053\_4APRI FAN\_1, In Service @ Capacitor 3 - Bus 1  
 Badge Number: 4053\_4APRI FAN\_1  
 Asset Description: Fan - Centrifugal  
 Serial Number: S00054

---

**Asset Location**

Location Information: Capacitor 3 - Bus 1  
 Building: Lake Substation  
 Run To Failure: W1NO  
 Service Area: North

d. Enter the **effective date/time** and click **Submit**.

Asset Operation: Out of Service  
 Activity Information: 200000037/17  
 Main Asset Information: Fan - Centrifugal, Badge Number 4053\_4APRI\_FAN, In Service @ 4A Primary Air Fan

Effective Date Time\*:

**Submit** Dismiss

The asset moves to out of service status in **Deinstalled** pool.

| Installed 2   |   |
|---|---|
| Asset: 2  |   |
| Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed                                 | 1 |
| Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan Asset Installed | 1 |
| Deinstalled 1   |   |
| Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset   | 1 |

**Remove Asset/Component:**

- a. Start the activity.
- b. To remove click the asset/component.

The screenshot displays two sections of the Oracle Field Service Cloud interface. The top section, titled 'Existing 2', contains a list of assets. The first asset, 'Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset', is highlighted with a red rectangular box. Below it is another asset: 'Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset'. The bottom section, titled 'Installed 2', shows two installed assets: 'Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed' and 'Fan - Centrifugal, Badge Number 4076\_AESCANFN\_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan Asset Installed'.

- c. Click **Remove**.

This screenshot shows the 'Remove' button highlighted with a red box in the top navigation bar of the Oracle Field Service Cloud interface. Below the navigation bar is the 'Asset Details' section, which displays the following information:

|                    |  |
|--------------------|--|
| Asset Information: | Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked |
| Badge Number:      | MTR004   |
| Asset Description: | Meter - Power - Tracked  |
| Serial Number:     | MTPW-000000004   |

- d. Enter the **effective date/time** and click **submit**.

This screenshot shows the 'Remove Asset' form in the Oracle Field Service Cloud interface. The form contains the following information:

|                         |  |
|-------------------------|--|
| Asset Operation:        | Remove Asset   |
| Activity Information:   | CreateNewWO_MainPage1234   |
| Main Asset Information: | INTWAMOFSC_TrackedAsset_DEMOBADGE001, DEMOBADGE001, Demo_InstalAsset |

Below the form is a field for 'Effective Date Time\*' with the value '11/25/2020 03:18:06 PM' and a calendar icon. At the bottom of the form are two buttons: 'Submit' and 'Dismiss'.

The asset/component is removed and moves to **Deinstalled** pool.

| Installed 2   |   |
|---|---|
| Asset 2   |   |
| Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed                                 | 1 |
| Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 48 Scanner Air Fan Asset Installed | 1 |

| Deinstalled 2   |   |
|---|---|
| Asset 2   |   |
| Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset | 1 |
| Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Removed Asset          | 1 |

**Undo Install:**

- a. To undo an installation, click the newly installed asset in the Installed pool.

| Installed 2   |   |
|---|---|
| Asset 2   |   |
| Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed                                 | 1 |
| Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 48 Scanner Air Fan Asset Installed | 1 |

| Deinstalled 2   |   |
|---|---|
| Asset 2   |   |
| Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset | 1 |
| Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Removed Asset          | 1 |

- b. Click **Undo Install**.

Attach Component   **Undo Install**   Follow Up Work

---

**Asset Details**

Asset Information: Fan - Centrifugal, Badge Number 4075\_AE5CANFN\_1, Out of Service @ Out of Service Storeroom

Badge Number: 4075\_AE5CANFN\_1

Serial Number: 500488

c. Click **Submit**.

Are you sure you want to undo install?     

---

Asset Operation: Undo Install

Activity Information: 20000002187

Main Asset Information: Fan - Centrifugal, Badge Number 4075\_AE5CANFN\_1, Out of Service @ Out of Service Storeroom

The Asset/Component installation is undone and it disappears from Installed Pool.

Existing 2

- Asset 2
  - 4B Scanner Air Fan 1
  - Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset 1

---

Installed 1

- Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed 1

---

Deinstalled 2

**Undo Attach:**

- a. To undo attach, click the newly attached Component in Installed pool.

| Existing 2   |   |
|--|---|
| Asset 2  |   |
| 4B Scanner Air Fan   | 1 |
| Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset | 1 |
| Installed 1  |   |
| Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed                              | 1 |

b. Click **Undo Attach Component**.

| Undo Attach Component | Follow Up Work   |
|-----------------------|--|
| <b>Asset Details</b>  |  |
| Asset Information:    | Brakes-Component, BRK-0001, BRK-0001, Brakes                                       |
| Badge Number:         | BRK-0001   |
| Serial Number:        | BRK-0001   |
| Attached To Asset:    | Fan - Centrifugal, Badge Number 4053_4APR1 FAN_1, In Service @ Capacitor 3 - Bus 1 |
| <b>Asset Location</b> |  |
| Location Information: | Capacitor 3 - Bus 1  |
| Building:             | Lake Substation  |
| Run To Failure:       | WIND   |
| Service Area:         | North  |

c. Click **Submit**.

| Are you sure you want to undo attach component? |   |
|---|---|
|   | Submit <input type="button" value="Dismiss"/> |
| Asset Operation:                                | Undo Attach Component                         |
| Activity Information:                           | 200000021/97                                  |
| Main Asset Information:                         | Brakes-Component, BRK-0001, BRK-0001, Brakes  |

The attach operation is undone and the component disappears from installed pool.

The screenshot displays two sections: 'Existing' and 'Deinstalled'. Each section has a sub-section for 'Asset' with a count of 2. The 'Existing' section lists '4B Scanner Air Fan' and 'Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset'. The 'Deinstalled' section lists 'Fan - Centrifugal, Badge Number 4053\_4APRI FAN\_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset' and 'Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Removed Asset'.

| Category    | Asset Name  | Count |
|-------------|---|-------|
| Existing    | 4B Scanner Air Fan  | 1     |
|             | Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset  | 1     |
| Deinstalled | Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset | 1     |
|             | Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Removed Asset          | 1     |

#### Undo Remove:

- a. To undo remove, click the removed asset.

This screenshot is identical to the previous one, but a red rectangular box highlights the asset 'Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Removed Asset' in the 'Deinstalled' section.

| Category    | Asset Name  | Count |
|-------------|---|-------|
| Existing    | 4B Scanner Air Fan  | 1     |
|             | Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset  | 1     |
| Deinstalled | Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset | 1     |
|             | Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Removed Asset          | 1     |

- b. Click **Undo Remove**.

Undo Remove Follow Up Work

**Asset Details**

Asset Information: Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked

Badge Number: MTR004

Asset Description: Meter - Power - Tracked

Serial Number: MTPW-000000004

**Asset Location**

Location Information: MeterFlow 650 - in WW Plant 4

Service Area: North

c. Click **Submit**.

Are you sure you want to undo asset removal?

Submit Dismiss

Asset Operation: Undo Remove Asset

Activity Information: 20000002197

Main Asset Information: Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked

The removal is undone and asset disappears from Deinstalled pool.

Existing 3

Asset 3

4B Scanner Air Fan 1

Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset 1

Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset 1

Deinstalled 1

Fan - Centrifugal, Badge Number 4053\_4APRI FAN\_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset 1

**Back to Service:**

a. To move asset back to service, click **Asset** in **Out of Service**.

| Existing 3   |   |
|--|---|
| Asset 3  |   |
| 48 Scanner Air Fan   | 1 |
| Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset                 | 1 |
| Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset | 1 |
| Deinstalled 1  |   |
| Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Out Of Service Asset                    | 1 |

b. Click **Back to Service**.

| Back to Service    | Follow Up Work   |
|--------------------|--|
| Asset Details      |  |
| Asset Information: | Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 |
| Badge Number:      | 4053_4APRI FAN_1   |
| Asset Description: | Fan - Centrifugal  |
| Serial Number:     | S00054   |

c. Click **Submit**.

| Are you sure you want to move asset back to service? |  | Submit | Dismiss |
|--|--|--------|---------|
| Asset Operation:                                     | Back to Service  |        |         |
| Activity information:                                | 200000021/97   |        |         |
| Main Asset Information:                              | Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 |        |         |

The asset moves from deinstalled pool.



Existing 4

Asset 4

|  |   |
|--|---|
| 4B Scanner Air Fan   | 1 |
| Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Asset               | 1 |
| Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset                 | 1 |
| Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset | 1 |

### Replace Asset:

- a. Click the asset which needs to be replaced.

Existing 3

Asset 3

|  |   |
|--|---|
| Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLTS Component                | 1 |
| Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLTS Asset               | 1 |
| Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset | 1 |



- b. Click **Replace** button.

Remove Out of Service Attach Component **Replace** Follow Up Work





Asset Details

|                    |   |
|--------------------|---|
| Asset Information: | Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template |
| Badge Number:      | MTR021  |
| Asset Description: | Meter - Power - Tracked   |
| Serial Number:     | MTPW-000000021  |

- c. Give the badge number of the asset to be replaced with and click **Search and Replace**.

|  |  |
|--|--|
| Asset Operation:   | Replace  |
| Activity Information:  | CreateNewWO_MainPage1234   |
| Main Asset Information:  | INTWAMOFSC_TrackedAsset, DEMOBADGE001, DEMOBADGE001, Demo_InstallAsset                                   |
| Effective Date Time*:  | 11/25/2020 03:19:44 PM  |
| Badge Number*:   | GEN_SR_RB_003           |
| <input type="button" value="Search And Replace"/> <input type="button" value="Dismiss"/> |  |

The new asset moves to the installed pool and the replaced asset moves to the deinstalled pool.

|   |   |
|---|---|
|  Existing 2                                      |   |
|  Asset 2   |   |
| <b>Gearbox - Component - Tracked, 0000121326, GEAR_004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component</b>            | 1 |
| <b>Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset</b> | 1 |
|  Installed 1                                    |   |
| <b>Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Asset installed</b>     | 1 |
|  Deinstalled 1                                 |   |
| <b>Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Replaced Asset</b>      | 1 |

**Replace Component:**

- a. Click the component to be replaced.

Existing 2

Asset 2

**Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component** 1

Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset 1

---

Installed 1

Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Asset Installed 1

---

Deinstalled 1

Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Replaced Asset 1

**b. Click Replace.**

Remove **Replace** Follow Up Work

Asset Details

|                    |   |
|--------------------|---|
| Asset Information: | Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain      |
| Badge Number:      | GEAR-004  |
| Asset Description: | Gearbox-Component-Tracked   |
| Serial Number:     | 0000121326  |
| Attached To Asset: | Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template |

**c. Enter the badge number of the replacing component and click Search and Replace.**

Asset Operation: Replace

Activity Information: CreateNewWO\_MainPage1234

Main Asset Information: INTWAMOFSC\_TrackedAsset, DEMOBADGE001, DEMOBADGE001, Demo\_InstallAsset

Effective Date Time\*: 11/25/2020 03:19:44 PM

Badge Number\*: GEN\_SR\_RB\_003

Search And Replace Dismiss

The Replaced Component moves to deinstalled pool and the newly attached component moves to the installed pool.

The screenshot displays a list of assets categorized into three sections: Existing, Installed, and Deinstalled. Each section shows a list of assets with their details and a count of 1. The 'Existing' section contains one asset: 'Meter - Power - Tracked, MTPW-00000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset'. The 'Installed' section contains two assets: 'Gearbox-Component-Tracked, 0000121325, GEAR-003, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component Installed' (highlighted with a red box) and 'Meter - Power - Tracked, MTPW-00000060, MTR060, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Asset Installed'. The 'Deinstalled' section contains two assets: 'Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Replaced Component' (highlighted with a red box) and 'Meter - Power - Tracked, MTPW-00000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Replaced Asset'.

### Undo Replace:

- a. Click **Installed Asset/Component**.

The screenshot shows the 'Installed' section of the asset list. The 'Gearbox-Component-Tracked, 0000121325, GEAR-003, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component Installed' asset is now in the 'Deinstalled' section, and the 'Meter - Power - Tracked, MTPW-00000060, MTR060, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Asset Installed' asset is now in the 'Installed' section (highlighted with a red box). The 'Deinstalled' section also contains the 'Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Replaced Component' and 'Meter - Power - Tracked, MTPW-00000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Replaced Asset' assets.

- b. Click **Undo Replace**.

Attach Component   **Undo Replace**   Follow Up Work

---

**Asset Details**

Asset Information: Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template

Badge Number: MTR060

Serial Number: MTPW-000000060

---

**Asset Location**

Location Information: VFD, Pump 9, RAS, PLT5

Service Area: North

c. Click **Submit**.

Are you sure you want to undo replace?   **Submit**   Dismiss

---

Asset Operation: Undo Replace

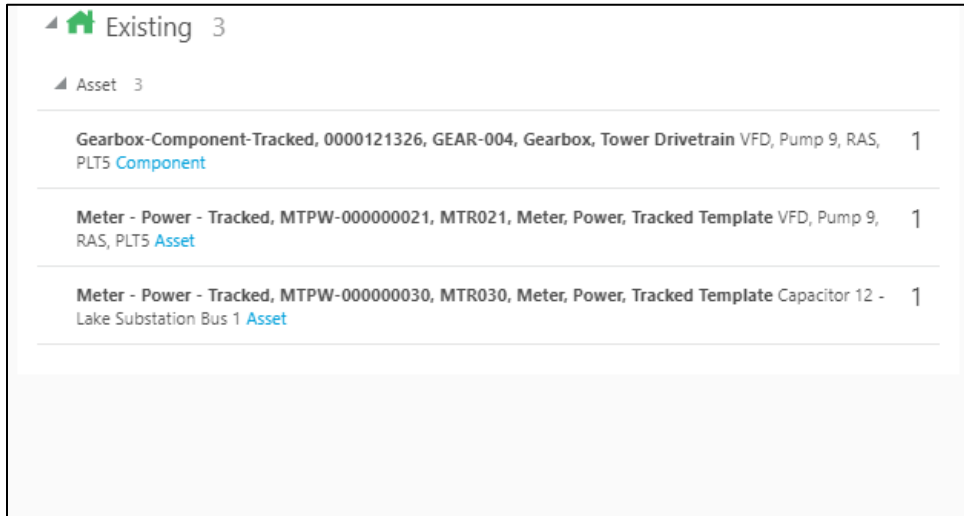
Activity Information: 200000021/104

Main Asset Information: Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template

The replaced asset moves back to existing pool.

|   |   |
|---|---|
| <p>Existing 2</p> <p>Asset 2</p>  |   |
| <p>Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 <a href="#">Asset</a></p>               | 1 |
| <p>Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 <a href="#">Asset</a></p> | 1 |
| <p>Installed 1</p>  |   |
| <p>Gearbox-Component-Tracked, 0000121325, GEAR-003, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 <a href="#">Component Installed</a></p>      | 1 |
| <p>Deinstalled 1</p>  |   |
| <p>Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 <a href="#">Replaced Component</a></p>       | 1 |

d. Repeat the above steps to undo replace for a component.



The screenshot displays a user interface for managing assets. At the top, there is a navigation bar with a home icon and the text 'Existing 3'. Below this, a section titled 'Asset 3' contains a list of three assets, each with a quantity of 1. The assets are: 1. 'Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component'. 2. 'Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Asset'. 3. 'Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset'.

| Asset Name   | Quantity |
|--|----------|
| Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component                | 1        |
| Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Asset               | 1        |
| Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset | 1        |

## Chapter 5: Customizations

Adding new properties according to the requirement and customizations help customers to enhance the functionality of the integration and increase the usability. The 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 whether they are available.

This chapter focuses on a few cases about customizations.

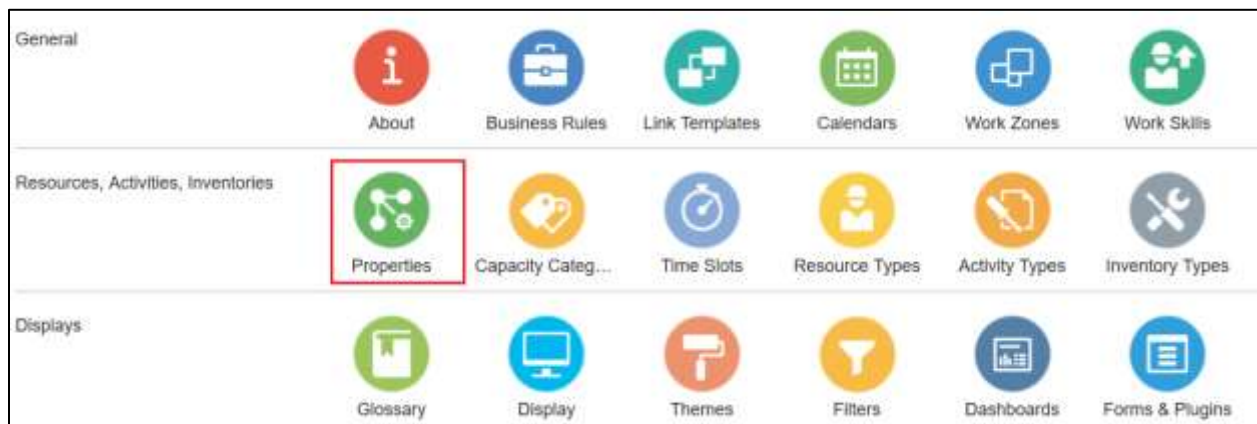
- [Adding New Fields to Field Activity](#)
- [Adding Custom Business Objects](#)
- [Plugins Rendering Data](#)
- [Validation for Completion](#)

### Adding New Fields to Field Activity

This section provides the steps to add a new field to the field activity already available but not present in the field activity.

#### *Oracle Field Service Cloud Configurations*

1. Login to Oracle Field Service Cloud.
2. Navigate to **Configuration > Resources, Activities, Inventories > Properties**.



3. Enter the **Property name** and **Property Label**.
4. Select the entity, type of GUI, and add the enumeration values “customprop1” and “customprop2”.

**Modify Property**

Property type: Enumeration

\* Property name

\* English: Test Custom Property

SpanishLA:

Portuguese (Brazil):

\* Property Label: test\_customproperty

Property hint

English:

SpanishLA:

Portuguese (Brazil):

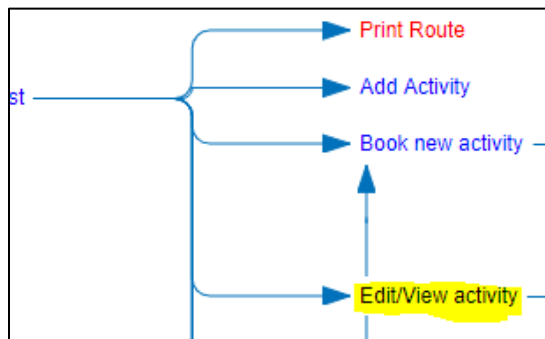
Entity: Activity

GUI:  Combobox  Radiogroup

Clone property data on Reopen or Prewrite:

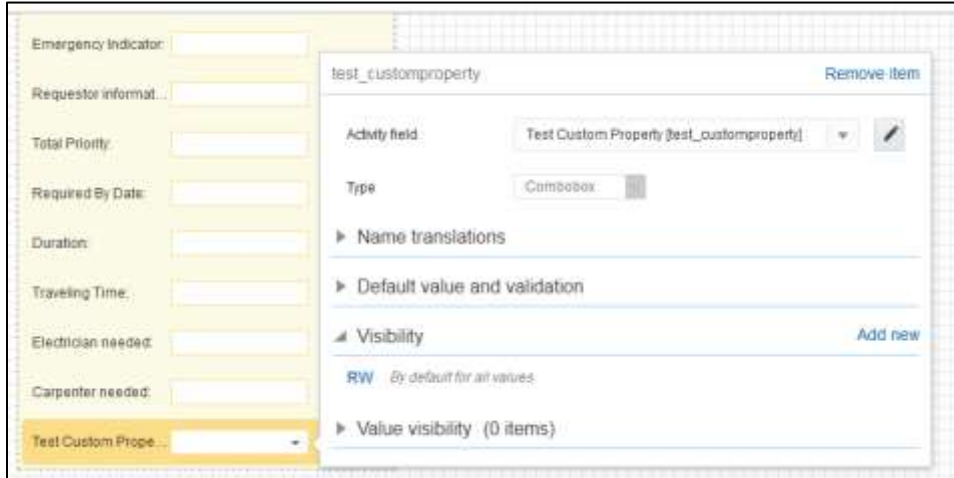
Enumeration values

5. Navigate to **Configuration > Users, Security, Integrations > User Types** and select the required user type.
6. Navigate to the Screen configurations for the select user type and open the **Edit/View activity** section.



7. Add a new element by dragging and dropping a new 'Input' from the **Add New Element** section.
8. Map the element to the **Test Custom Property**. Save this configuration after mapping the field.



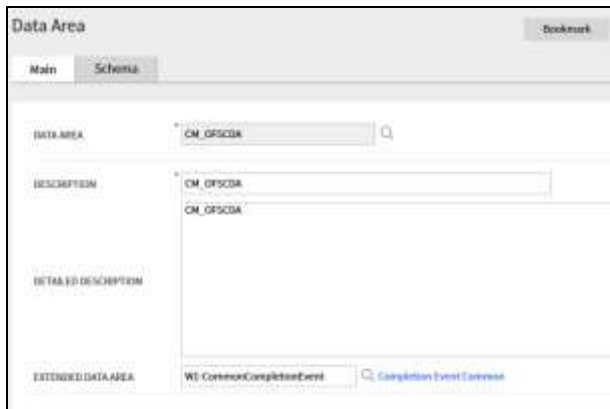


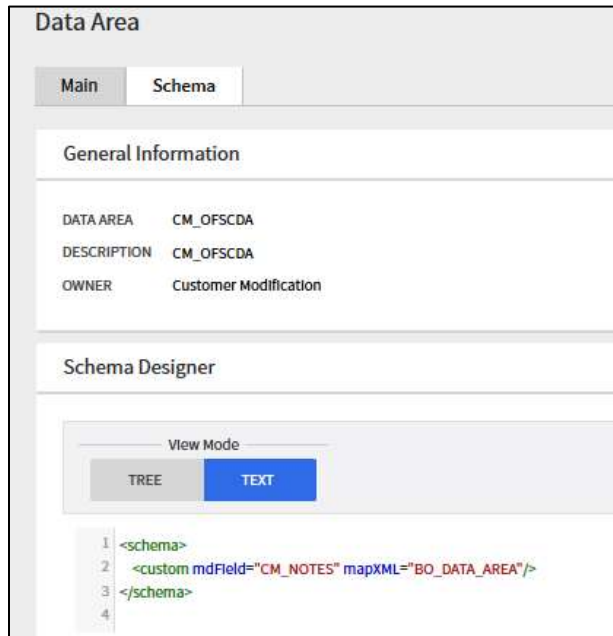
### Oracle Utilities Work and Asset Cloud Service Configurations

1. Login to Oracle Utilities Work and Asset Cloud Service.
2. To configure with a new schema element:
  - a. Navigate to the W1-ActivityComplInboundComm business object.
  - b. Identify the data area to add the new schema element.

Example: To make changes to the Completion Event Details section, the data area to be changed is the custom data area created for Oracle Field Service Cloud.

- c. Extend the data area. Add the completion event details data area in the **Extended Data Area** field.





d. The new schema element is displayed in the business object schema.

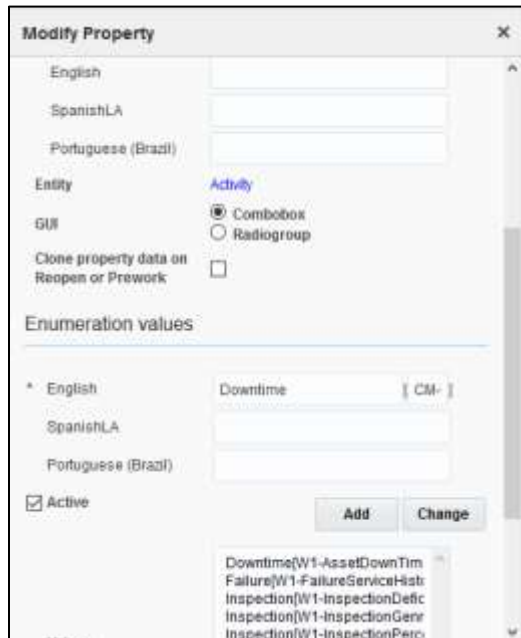


## Adding Custom Business Objects

After a custom business object for a service history is added in Oracle Utilities Work and Asset Management, the information is available to Service History plugin along with all other service histories as part of “wam\_asset\_valid\_service\_history\_types” property.

In Oracle Field Service Cloud the new business object value is added as an enumeration value in “wam\_service\_history\_bo” property.

If the new business object belongs to one of the predefined service history categories of Questionnaire, Inspection, Failure, Downtime and General, it is defined as such in the property. For example: A custom business object “CM\_Downtime” is entered in the “wam\_service\_history\_bo” property as shown below. The service history plugin will automatically handle the new business object.



If the new business object entered does not fall into any of the predefined service history categories, after the “wam\_service\_history\_bo” property is updated, the service history plugin javascript should be updated to handle the new service history category. Create a new XSL that needed for the UI of the new service history category to be added.

## Plugins Rendering Data

This section explains how each plugin renders the data.

### Measurements

- Valid measurement types received from Oracle Utilities Work and Asset Clod Service are assigned to “wam\_valid\_measurement\_types” property and are obtained in runtime as XML string and displayed in plugin.
- The individualMeasurementType-to-form.xml and individualMeasurementTypeEdit-to-form.xml are used to style the UI forms to add and update measurement information.
- The measurement information is consolidated into “wam\_measurements\_output” property and made available for validateCompletion plugin.
- Measurement reason types (wam\_measurement\_meter\_reason, wam\_measurement\_gauge\_reason) are populated based on the measurement type selected.

### Resource Usage

- resourceUsage-to-form.xml provides the summary of **Resource Usage Details** page from where crew can add timesheets, equipment, and other resource usage. It also displays the resource usage details entered.
- individualTimeUsage-to-form.xml used to display add/update time sheet screens whereas crewTimeUsage-to-form.xml is used to enter and update individual and crew timesheets.

- individualEquipmentUsage-to-form.xml and individualOtherUsage-to-form.xml are used to enter equipment and other resource usages.
- Upon completion of resource usage which calls Oracle Integration Cloud (Oracle Utilities OFSC WACS Resource Usage Details integration flow) and update the details in Oracle Utilities Work and Asset Cloud Service.

### *Service History*

- The below XSL are applied to render the UI:
  - serviceHistoryTypes-to-form.xml to show Service History List and the Entered Service histories
  - downtime-to-form.xml for Downtime Service History form
  - failure-to-form.xml for Failure Service History form
  - questionnaire-to-form.xml for Questionnaire and Inspection Service History form
  - sh-to-form.xml for General Service History form
  - entered-sht-count.xml is used to count the entered service histories per each service history type
  - shAttachment-to-form.xml to enter attachments
- The valid service histories are displayed based on the service histories hold by “wam\_asset\_valid\_service\_history\_types” property.
- The asset failure information is displayed based on the values holds in “wam\_failure\_info” property.
- The asset downtime reason is displayed based on the values holds in “wam\_downtime\_reason” property.
- The following BO categories are supported. (Questionnaire and Inspection are handled similarly)
  - Questionnaire
  - Inspection
  - Failure
  - Downtime
  - General
- Refer to [Chapter 5: Customizations](#) for information about adding a custom business object.
  - If the completion message for service histories is greater than 655360, the message is split into multiple wam\_service\_history\_output(i) where i values ranges from 1 to 20 (ie size upto 640KB) properties and and made available for validateCompletion plugin.

### *Asset Component Install Exchange Undo*

- The below XSL are applied to render the UI:
  - assetQuery-to-form.xml to show Install, Attach, Replace, and Undo operation screens.
- Every operation will have have “wam\_asset\_effective\_date\_time” property on the screen defaulted to Current Date/Time which can be modified by the user.
- Upon clicking “Search and Add” or “Search and Replace” for Install, Attach, and Replace operations, it calls Oracle Integration Cloud (Oracle Utilities OFSC WACS Asset Query integration flow). If the response succeeds, the assets details are received and the operation is performed successfully. If the response fails, a valid error message is displayed on the screen.

## Validate Completion

- This plugin is used to validate and construct the final completion message obtained from individual plugins that is sent out by Oracle Field Service Cloud to Oracle Utilities Work and Asset Management. Click **Complete**.
- The plugin validates to check if there are any pending service histories and all the required service histories are completed.

If the validations are successful, click **OK** to write the completion message to a temporary file. If the validations are successful, click **Complete** to send the completion message to Oracle Utilities Work and Asset Management.

- The plugin populates the “participation” node in the completion message with either "W1AW" or "W1AS" based on if the “Asset worked” was selected (checkbox selected) or not.

## Lock Unlock

- index.html page provides the summary of **Lock/Unlock status** from where user can Lock or Unlock Activity.

Only on Locking a activity crew can start the operations such as Asset Install, replace, remove, adding timesheet. Equipment and other details. A crew member can lock the activity with out starting it. Once activity is locked by any crew it can be unlocked by himself or from dispatch console.

## Pick Up

- assetQuery-to-form.xsl <TBU>.
- pickupWork-to-form.xsl <TBU>.
- workOrderRequest-to-form.xsl <TBU>.

# Validation for Completion

## Validation Rules

- Basic validation is to ensure that the activity has all the necessary information to be completed.
- All pending service histories must be completed when completing the activity (mandatory).
- Required service histories must be entered for worked assets.
- For each asset that worked, loop through the list of required service history types defined on the activity.
- Find all service histories in the list of activity service histories that its service history type = current service history type being processed and either asset ID = empty or equal current asset being processed.
- If not found, issue an error that "A service history of type %1 is missing for asset %2".

## Chapter 6: Hosting Plug-Ins in OFSC

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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/20d/fapcf/configure-and-use-plugins.html#c\\_hostingPlugins](https://docs.oracle.com/en/cloud/saas/field-service/20d/fapcf/configure-and-use-plugins.html#c_hostingPlugins)

The plugins can be hosted externally on

1. Any webserver (Eg: Tomcat) running on a virtual machine either on premise or on cloud
2. 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, then

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 webserver

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/20d/fapcf/configure-and-use-plugins.html#configure-and-use-plugins>

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/20d/fapcf/configure-and-use-plugins.html#c\\_authentication](https://docs.oracle.com/en/cloud/saas/field-service/20d/fapcf/configure-and-use-plugins.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, refer to the latest Oracle Utilities Cloud Services Object Storage Setup Guide at:

[https://docs.oracle.com/cd/F35460\\_01/PDF/UGBU\\_Cloud\\_Services\\_Object\\_Storage\\_Setup\\_20C.pdf](https://docs.oracle.com/cd/F35460_01/PDF/UGBU_Cloud_Services_Object_Storage_Setup_20C.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.