Contents

About this Document...................................................................................................................... 5
Getting Started with Oracle Field Service Cloud........................................................................7

Chapter 1: Using OFSC Location................................................................................................. 9
  Technical Functionality.................................................................................................................. 10
  Compatible Browsers.................................................................................................................... 10
  Requirements to Send Data through the Mobile Device............................................................... 10
  Requirements to Send Data through the Device in the Vehicle.................................................. 10
  Setting Up OFSC Location.......................................................................................................... 10
    Turning on the OFSC Location Features................................................................................... 10
    Configuring OFSC Location Settings......................................................................................... 10
  Troubleshooting OFSC Location................................................................................................ 11
    Verifying that the Resource is Following the Route in Map View........................................... 11
    Verifying that the Resource is Following the Route in Time View........................................ 12
    Locating a Resource.................................................................................................................. 12
    Identifying Idle Time................................................................................................................ 12

Glossary........................................................................................................................................ 15
About this Document

This document describes the general principles on which the Oracle Field Service Cloud (OFSC) system is based. It is intended for the personnel who work with OFSC.

Important: This document explains how to accomplish tasks in the Sunrise demo instance of OFSC. If your instance of OFSC is configured differently or if you have customized your instance, your screens, labels, and processes may differ from those described in this guide.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable: U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

If this software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners. Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group. This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Documentation Accessibility

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

Access to Oracle Support: Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.
Getting Started with Oracle Field Service Cloud

Oracle Field Service Cloud (OFSC) can help you complete your day-to-day tasks faster and more accurately than traditional or manual workforce management tools. In particular, you can use OFSC to:

- **Understand what is happening in the field right now.** Use the Time View to see at a glance where resources are working and what they are working on. You can easily see who is at a job site and who is traveling as well as the status of their activities.

- **Reduce calls to and from the field looking for a resource to take a new job.** At a glance, you can tell whether the resource has time available for additional work.

- **Place new work on a route quickly and easily.** If the resource does have time, you can move work to the route.

- **Respond to jeopardy situations immediately.** When an activity is a risk, you can move it to avoid the service window being missed.
Chapter 1

Using OFSC Location

Topics:
- Technical Functionality
- Setting Up OFSC Location
- Verifying that the Resource is Following the Route in Map View
- Verifying that the Resource is Following the Route in Time View
- Locating a Resource
- Identifying Idle Time

OFSC Location is part of OFSC, a mobile workforce management application.

OFSC Location uses GPS information to display the resource’s actual route on a map in real time. In addition, the feature can compare the resource’s actual route to the projected route. This information can help you perform the following tasks:

- **Locate a resource:** When you need to know where a particular resource is, you can quickly identify the location and the activity being performed. With the details provided in the interface, you can also estimate whether the next activity will be delayed and when the resource will arrive at the next activity.

- **Identify idle time:** OFSC Location displays idle time on a map so that you can quickly identify where and when the resource was idle.

- **Verify that a resource is following the route as expected:** OFSC Location tables the resource’s actual route against the projected route so that you can easily tell whether the resource is following the prepared route. At glance, you can tell if there is a problem with the route like a delay at the activity, heavy traffic, or a detour.

**Important:** This guide only covers tasks associated with the OFSC Location module. See the OFSC Manage User Guide for information about other OFSC dispatch and administration tasks.
Technical Functionality

OFSC Location populates the Map view with the resource’s location information. It uses GPS information from the resource’s mobile device or from the device in the vehicle to create this view.

Compatible Browsers

The following platforms and browsers are compatible with OFSC Location:

- Android 2.2 and later
- Blackberry OS 6 and later
- iOS 4.2 and later
- Mozilla Firefox Mobile 4.0 and later
- Mozilla Firefox Desktop 3.6.14 and later

Requirements to Send Data through the Mobile Device

When you use the resource’s mobile device to send GPS information, the following items are required for OFSC Location to work correctly:

- OFSC must be configured and running.
- The device must be capable of collecting GPS information and transmitting it using the device’s Internet browser. This capability must be native to the device. The solution does not work with external devices for GPS and WIFI.
- The mobile device that contains the GPS tool must support html 5.
- The resource must be logged in to the OFSC interface on the mobile device.
- The resource must accept the browser request to share location data with OFSC.

Requirements to Send Data through the Device in the Vehicle

When you use the device in the vehicle to send GPS information, the following items are required for OFSC Location to work correctly:

- OFSC must be configured and running.
- You must write an application to transfer the data from the device to OFSC through the OFSC SDK. See the GPS API SDK for detailed instructions.

Setting Up OFSC Location

You must activate a number of settings in OFSC Core Manage before OFSC Location will work.

Turning on the OFSC Location Features

Before resources, dispatchers and other users can use the OFSC Location features, you must turn them on.

1. In the Web interface, navigate to Company > Settings > Permissions.
2. In the tree on the right side of the screen, navigate to Company Settings > Map > GPS > Smart GPS.
3. In the main window, select Show next to the profiles that you want to have access to OFSC Location.

Configuring OFSC Location Settings

You must configure the OFSC Location in OFSC Core Manage to activate the communication between the device and the system. You can also customize the display of certain OFSC Location information in the interface.

Perform the following steps:

1. In the Web interface, navigate to Company Settings > Business Rules. Under GPS, fill in the fields as described below:
• **Identify technician by:** The property to use to identify the resource when you use the GPS device in the vehicle and the GPS API. You can leave this field blank if you use the resource’s mobile device to send GPS data.

• **Resource is considered idle if moved less than … meters within … minutes:** The maximum distance moved and the minimum amount of time idle to use to determine that a resource is idle. 500 meters and 30 minutes are typically good values.

• **Resource is considered to be at the activity location if the distance to it is less than … meters:** If the resource is further away from the activity location than this value, the resource is considered not at the activity location. 100 meters is typically a good value.

2. **Company Settings > Resource Types**

   In the row for the Resource that sends the GPS data, click **Modify**.

   Check the following boxes:

   - Track geolocation in Mobile Interfaces
   - Calculate coordinates with high precision

3. **Optional:** Navigate to **Company Settings > Display.** Under **Map,** complete the settings below:

   • **Fade resources:** Check this box to fade and hide resource icons when GPS data is not received after a certain amount of time.

   • **Fade resources in:** When the GPS data is not received for a certain amount of time, the resource’s icon appears transparent, or faded, on the map. This setting determines that amount of time. You must check the **Fade Resources** box to activate this setting.

   • **Hide resources in:** When the GPS data is not received for a certain amount of time, the resource’s icon is removed from the map. This setting determines that amount of time. You must check the box to activate this setting.

**Troubleshooting OFSC Location**

If OFSC Location is not working properly, there might be a problem with the configuration.

See the following list of common problems and the possible solutions:

• **Location dots are not displayed in Map view in the Web interface:** Verify that Show Resource Trace is checked in the View drop-down menu. Verify that the user account is tied to a resource.

• **Data for a resource is not displayed in Map view in the Web interface:** The resource did not authorize the mobile device to send GPS data to OFSC. The resource must accept the browser request to share location information. The resource closed his internet browser or logged out of the mobile interface. Ask the resource to log back into the OFSC mobile interface.

**Verifying that the Resource is Following the Route in Map View**

OFSC Location provides details in the Map view of the Web interface that you can use to verify that the resource is following the route.

Perform the following steps:

1. View a resource in map view. The route displays.
2. On the View drop-down menu, select **Show Driving Directions** and **Show Resource Trace.**
3. OFSC compares the resource’s actual route to the route that is projected by OFSC. Colored dots indicate the locations that the GPS sent back to OFSC.

The colors represent the following statuses:

- **Blue dots:** indicate locations that the GPS device sent to OFSC that are compliant with the projected route.
- **Red dots:** indicate locations that the GPS device sent to OFSC that are outside of the projected route.
- **Yellow dots:** indicate idle time.
Verifying that the Resource is Following the Route in Time View

OFSC Location provides details in the Time view of the Web interface that you can use to verify that the resource is following the route.

Perform the following steps:

1. View a resource in time view. The schedule displays.
2. Look for red lines under the scheduled activities. These lines indicate that the resource is off of the projected route or is idle. They could indicate that the resource is not following the projected route.
3. Short excursions could be due to heavy traffic or road closures. Longer excursions might indicate a problem worth investigating.
   - Optional: Compare the information in this screen with the OFSC Location information in Map view to help you determine whether the resource is on schedule.
   - Optional: If you cannot tell whether the resource is on schedule, you might also contact the resource to verify that everything is OK and that customers are receiving the anticipated service within the promised window of time.
   - Optional: Move activities as necessary to ensure that customers receive the expected level of service.

Locating a Resource

You can use OFSC Location in Map view of the Web interface to find a resource’s current location.

Perform the following steps:

1. View a resource in Map View. The route displays.
2. On the View drop-down menu, select Show Resource Location on Map.

A Resource icon in a white balloon displays on the map in the position where the resources is currently located.

Identifying Idle Time

You can use the OFSC Location module to see idle time on a resource’s schedule in Map view in the Web interface.

Perform the following steps:

1. View a resource in map view. The route displays.
2. On the View drop-down menu, select **Show Driving Directions** and **Show Resource Trace**. The resource’s actual route is tabled on top of the projected route.

3. Look for yellow dots along the route.

These dots indicate that the resource was not engaged in an activity.
Glossary

Action Link

A connection that opens a screen where you can perform an action in the OFSC system. Common examples include Add Activity, View Details, Delete, and Modify. Links are configured in Action Management.

Action Management

A screen in OFSC where action links are configured. The information in this screen determines which links appear in which locations in the interface.

Activate Queue

A link or button that starts the resource’s workday in OFSC. For OFSC to monitor delivery in real time and respond to updates, a resource must activate his or her queue, or route.

Activity

Any time consuming work performed by a resource (such as: customer-related job, network maintenance, lunch break, warehouse visit, meeting, etc). Every Activity has Type, start and end time. Activity type defines specific parameters of the activity (flow, attributes, color on screen, etc)

• A Non-scheduled Activity is an Activity not assigned to a specific date.
• A Not-ordered Activity is an Activity that its order of execution in the queue is not defined at the moment, so it can be executed at any time during the working day; Not-ordered activities do not have ETA and Delivery window defined.
• An Ordered Activity is an Activity that its place in the queue is defined, and it has to be performed in the correspondent moment of the working day. Order of activities can be changed; Ordered activities can be set not-ordered and the other way round.

Activity Status

Defines a stage in the activity flow. Not to be confused with an Activity type. Possible values:

• Pending: Activity is planned to be executed, resource has not arrived on site yet. This is the initial status an activity has on creation. From this status, an activity can be started, canceled or deleted.
• Started: Resource has arrived to the place of activity. Only one activity can be started in a resource's route at a given time. Started activities can change status either to suspended, completed or not done.
• Completed: Resource has successfully finished work. This is a final status and can't be changed (only the Reopen command can be applied for this activity).
• Not done: Resource could not finish work successfully. This is a final status and can't be changed (only the Reopen command can be applied for this activity).
• Suspended: Activity could not be finished successfully but resource plans to return later and resume work. Activity gets to this status using the Suspend command that creates a clone of this activity in the same queue (as a Not ordered activity with pending status).
• Canceled: Customer asked to cancel the activity or it was canceled for a different reason. This is a final status and can't be changed (only the Reopen command can be applied for this activity).
• **Deleted:** Similar to canceled but such activities are not shown in OFSC. They look like they have been physically erased.

### Activity Type

A label that defines the specific parameters of the activity. Activities can be of one of the following types:

- **Regular:** Typical activity. Originally every work comes as regular activity (? this is not clear/Irad)
- **Prework:** Activity created by the Prework command. This command is applied to a regular activity and creates a clone of it with the type prework to distinguish between the two. Prework activities are created as already started (see activity status).
- **Reopened:** activity created by the Reopen command applied to some completed, not done or canceled activity (see activity status). This command clones the activity creating a new Not ordered activity with type reopen and status pending for the same resource.

The following activity types are used for the different entities that share the same database table:

- **Activity:** this is an activity that does not have a customer associated with it. Usually it is a break, assistance another resource or non-customer related work (network maintenance). See Activity for more details.
- **Team work:** this is specific type of activity where one resource assists another resource (is a member of the team). See Team work for details.

### Add Time

A feature in OFSC that allows a resource or other user to add additional time to an activity when the activity extends beyond the estimated end time.

### Agent

Any standalone application that interacts with the OFSC platform via the OFSC API or OFSC kernel

### Aggregator

A high level entity on the resource tree that functions as a parent directory for other resources. An Aggregator cannot be assigned activities.

### All Day Activity

An activity that can be done any time during the day without violating any obligations of the company. In OFSC terminology, All-day activities are activities without a Service window. Pay attention that sometimes people mix All-day activity (without service window) and Not ordered activity (without ETA).

### API

An Application Programming Interface (API) is a particular set of rules and specifications that a software program can follow to access and make use of the services and resources provided by another particular software program that implements that API. It serves as an interface between different software programs and facilitates their interaction, similar to the way the user interface facilitates interaction between humans and computers. All OFSC APIs are based on standard protocol – SOAP (version 1.1). The interfaces process SOAP requests received by HTTP protocol. APIs have no limitations on the location, technology or platform used for integration (i.e.: Java,.Net, C/C++ on Windows or Unix).
Appointment

See *Activity*.

Assigning

Attaching an individual activity or a queue of activities to a resource.

Assistant

In a Teamwork activity, the resource that assists another resource. In the Resource Tree, the arrow points away from the Assistant. See *Teamwork* and *Team Leader* for more information.

Billing System

System where customer details are held, customer billing takes place, and/or activities are entered.

Booked Activities

The number of activities that are either in an OFSC bucket or located on a route.

Bucket

Element of the Resource tree representing place where jobs are kept before they are assigned (manually or automatically) to specific resources.

Business Rules

A number of settings in OFSC that align the functions of the system with the strategies and practices of your company.

Calendar

A view of the schedule for a resource, group or bucket.

Capacity

The workforce with the necessary work skills to manage the *activities* of a defined period of time

Capacity Bucket

*Bucket* used for Quota management
Capacity Categories
A set of work skills and time slots that are bundled together to estimate the time and skills required for a particular task. This information is sent through an API to your company’s activity system so that agents can tell whether qualified resources are available before they book an activity.

Capacity Management
A process of managing a workforce to ensure that a company has enough people with the specific skills to do a certain amount of work. There is a related process, Quota management, that defines the reverse relationship.

Company Boundaries
The area where your company performs customer service. Company boundaries are defined under Business Rules. Use the coordinates of the upper left corner and the lower right corner to define the area.

Company Settings
A screen in OFSC that contains many of the configuration settings. Companies may have different access levels to affect company settings. If you are unable to change your configuration settings, contact Oracle support.

Compliance
Following the route as predicted by OFSC. A resource is in compliance if he or she starts the activity at the estimated arrival time, completes the activity at the estimated completion time, has minimal idle time, and does not detour from the calculated driving directions.

CSR
Customer Service Representative. A person who speaks with customers and sets activities.

Customer-Facing Activity
A task that must be performed at the customer’s home or business. Examples include installations, upgrades, and deliveries. See Activity for more information.

Daily View
A view that shows the calendar of a resource, group, or bucket for a whole week. This view is useful for making small changes to individual calendars in the current week.

Delivery Window
The time that OFSC estimates that the resource is expected to arrive at the customer’s home or business. The window includes a buffer to account for travel time and the potential for delay. This timeframe is shorter than the Service Window.
Dispatcher

A person who allocates activities and monitors the progress of activities and resources.

Display

A screen in OFSC that contains configuration settings used to control what properties and layout structures users can see within the forms of the interface. These settings also control the format of some information, for example, the first day of the week in calendar views.

Equipment

See Inventory.

Estimation

A term used in Capacity Management also referred to as "capacity estimation" which determines the number of man-minutes available for a particular time slot based on resource calendars.

ETA

**Estimated Time of Arrival** The time that OFSC predicts that the resource will arrive at the customer’s location. ETA for pending activities is calculated dynamically from historical data. For completed activities, the ETA is the time when the resource actually arrives at the customer’s location.

Field

Property present in the system by default

Filters

A set of parameters used to reduce the results of a search. Filters are also used in routing plans to predefine the information that routing uses to distribute activities to resources.

Forecasting

New feature of OFSC allowing to forecast the company workload on the basis of historical data

Glossary

The configuration dictionary that maps default names, labels, and phrases used in the interface to the client’s preferred names, labels, and phrases. **Note:** Property names are managed in the Properties screen.

GUI

Graphical User Interface, allowing people to use software by manipulating images rather than by issuing text commands.
**Group**

A container in the *Resource Tree* used to sort and organize the other items in the Resource Tree. Groups are typically used to sort resources by location. Groups cannot own a route and you cannot assign activities to them.

**Hint**

A pop-up window that displays additional information about the activity or resource that you select. Hints also contain actions links that can take you directly to the action that you want to perform on the item.

**Historical data**

Data of the past periods available in the database or from other sources.

**Holidays**

A screen in OFSC where you can define the dates that outgoing communications of notifications are blocked, due to customer unavailability on that date.

**Idle Time**

Any time that a resource spends not in transit or not working on an activity.

**Internal Activity**

A task that is not performed directly for the customer. Internal activities typically do not take place at the customer’s home or business. Examples include vehicle maintenance and company meetings. See *Activity* for more information.

**Inventory**

A list of items managed within OFSC and can include various inventory pools as well as serialized and non-serialized parts. See *Inventory Pools, Trunk stock, Non-serialized Inventory*, and *Serialized Inventory* for more information.

**Inventory Pools**

Items associated with a resource, typically *Trunk stock*, end customer, or warehouse.

**Jeopardy Situation**

A situation in which OFSC predicts that the activity will miss its promised service window. Predicted jeopardy situations are colored pink in the OFSC interface.

**List View**

A chronological list of the day’s activities for the selected resource, group or bucket. Activities are ordered by estimated start time.
Login Policies
A screen in OFSC that sets the requirements for logging in and for usernames and passwords.

Manage
The core module of OFSC. Includes all of the main functions including monitoring, routing, and reporting.

Map View
A view of the day’s activities for the selected resource, group, or bucket. This view displays the activities on a map.

Mass Activity
An activity involving 2 or more resources.

Max Available
The maximum capacity available by calendar on the selected day, time slot or capacity category.

Message Scenarios
A set of rules that specifies how to process a message notification or transaction. Message Scenarios are launched by Notification Triggers. See Notification Triggers for more information.

Min quota
The minimum number of minutes to be allocated for booking of the activities belonging to the selected time slot (only on time slot and capacity category level).

Mobility
The user interface for OFSC that is accessed through a mobile device. Field service representatives typically use this interface. It is a separate module of OFSC.

Non-Instantiated Activities
All activities not part of quota management (for which no capacity category associated with work skills exists)

Non-Scheduled Activity
An activity that is not assigned to a specific date.
Non-Serialized Inventory

Inventory associated with a part that is generically defined within OFSC so that Trunk stock might be decremented based on required inventory associated with activities. (Note: Any part can be defined as "non-serialized inventory" even those parts with serial numbers on them. For example, a cable modem with a serial number, can be "Non-serialized inventory" within OFSC so that Trunk stock inventory levels can be managed daily and associated with a route). See Serialized Inventory and Required Inventory for more information.

Non-Working Reasons

A calendar setting used when a resource is absent. Typical non-working reasons include illness, vacation and bereavement.

Not Done Activity

A status used to identify an activity that cannot be completed today. For activities that cannot be completed right away, but can be completed today. See Suspend for more information.

Not Ordered activities

Activities that do not have ETA. Resource, dispatcher or routing may define the order (for example command change order in mobile interface or edit activity command in web interface).

Notification

Message activity related information sent by OFSC to a customer, a resource, a dispatcher, or another system. Notification can be received through telephone, email or SMS.

Notification Triggers

Workflow events that invoke Message Scenarios when a particular internal event occurs. As a result, messages are delivered to customers. For example, if you use a post activity survey, you might have a notification trigger to launch the post activity survey message. In this case, when a customer-facing activity is completed, a Notification Trigger launches a Message Scenario that sends the post activity survey message to the customer. See Message Scenarios for more information.

Ordered activities

Means that the order of execution is defined - resource, OFSC Routing or dispatcher have already defined that this activity will be executed after another defined activity. In this case activity gets an estimated time of arrival and is classified as ordered.

Other activities

All repeating, mass and shift activities, including those without instances, which are not part of Quota management
**PAS**

**Post Activity Survey.** A survey that you might send to your customer after the activity is completed to measure their satisfaction.

**Pending Activity**

An activity status used for activities that are scheduled but not yet started.

**Percent Quota**

Percent of the capacity that is available for booking.

**Percentage to Stop Booking**

The percentage of the used quota at which activities booking is to be stopped.

**Permissions**

A screen in OFSC where you can configure which features users can see and use. Permissions are applied to Profiles, not individual users. See **Profiles** for more information.

**Placeholder ID**

A number used to identify names, labels, and phrases used in the OFSC interface. Each name, label, and phrase has a unique number.

**Planning**

Company's estimation of the workforce or workload required at a certain moment.

**Profiles**

A screen in OFSC where you can configure groups of users. Those groups are then assigned Permissions to control which features they can see and use. See **Permissions** for more information.

**Properties**

A screen in OFSC where user interface fields are defined. You can specify details such as field length, field type, and valid values.

**Provider**

See **Resource**
**Quota**

A limitation set on the number of activities booked within a selected day, time slot or capacity category.

**Quota Management**

A process of defining the amount of work (per work skill and time slot) that a company should perform for a specific area (example: bucket) for a specific day. There is a related process, *Capacity management*, that defines the reverse relationship.

**Quota Matrix**

Grid that displays Quota and Capacity information for a period of time defined by the user. Data can filtered and displayed by day, time slots, or capacity categories.

**Regular Work Zone**

A region where a resource’s activities are typically located.

**Repeating Activity**

An *activity* recurring with a predefined frequency in a predefined period.

**Required Inventory**

When a particular resource's route includes activities associated with non-serialized inventory, OFSC can highlight where Trunk stock is insufficient. In the event that a resource's Truck stock is insufficient for a particular route, required inventory highlights the job and indicates which Non-serialized inventory components are missing.

**Resource**

An element in the resource tree representing a defined company asset. A Resource is the OFSC entity representing someone (or something) which provides service on behalf of the company.

**Resource Calendars**

A view that displays the details about an individual resource’s schedule. This view is useful for making changes that involve more than one day or more than one resource. See *Calendar* and *Daily View* for more information.

**Resource Tree**

A hierarchical view of the organization’s resources, typically sorted by geographical region. It is displayed on the left side of the screen in Manage.
Resource Types
A set of characteristics that you can apply to a resource. Default Resource Types are Groups, Buckets, and Resources. See Group, Bucket, and Resource for more information. If you want to change the Resource Types that you use in OFSC, contact Oracle support.

Route
A list of activities assigned to a resource for a specific date, or a list of non-scheduled activities assigned to a resource.

Route by Inventory
A concept within OFSC that limits routing options based on each resource's trunk stock and those activities associated with non-serialized inventory.

Routing
The act of assigning activities to resources. OFSC routes activities to resources using a sophisticated algorithm that considers a number of factors including calendars, work zones, and work skills.

Routing Plans
Provides the rules that OFSC uses to route activities to resources. Routing plans work together with the other OFSC components to apply your business goals and strategies to the routing process.

Routing Profiles
Containers that hold routing plans. Routing Profiles can be assigned to buckets. You can use Routing Profiles to assign several routing plans at once.

Scheduled Activity
An activity that is assigned to a particular day and a particular time slot.

Scheduled, Not Ordered Activity
An activity that is assigned to a particular day, but is not assigned to a particular time slot.

Serialized Inventory
Inventory parts that are unique and cannot be decremented based on a route's activities. See also: Non-serialized inventory, Required inventory.

Service Level Agreement
The time window that the activity must be completed in. This window is promised to the customer.
**Service Window**

The time window that the activity must be started in. This window is promised to the customer. This time frame is longer than the Delivery Window.

**Shifts**

Patterns of working time. You can create separate shifts for each of the different working time patterns within your organization.

**OFSC Collaboration**

A separate module for OFSC that provides a real-time, context-aware collaboration tool for all OFSC users. A user can, for example, locate nearby, working resource and share details about a resource, activity, or inventory item. Also, OFSC Collaboration supports a confirm-receipt process for moving an activities or inventory which is always valuable but even more so when resources are in remote locations and potentially off line.

**OFSC Location**

OFSC Location uses geo-location information to display a resource’s actual location on a map in real time. In addition, the feature can compare the resource’s actual route to the projected route within OFSC. Resource location can be derived either from a vehicle-installed GPS device communicating via API to OFSC and / or through a GPS-enabled mobile phone with an open HTML5 browser.

**Statistical Parameters**

A screen in OFSC where you can configure the elements used when collecting and analyzing statistics. OFSC uses statistical data on actual activity and travel duration to calculate estimated time of arrival and delivery window. Additionally, Routing uses the statistics to assign activities to resources in the most effective manner.

**Status**

A term with specific and different meanings depending on the OFSC module used.

- Capacity and Quota management status refers to a specific work zone and whether it is open or closed.
- OFSC Core Manage and OFSC Mobility, the term "activity status" (but sometimes shortened to "status") refers to whether a routed job is pending, started, completed, not done, suspended, canceled, or deleted. See Activity Status for more information.

**Suspend**

An activity status that allows an activity to be postponed if the work cannot be completed right away. Suspend allows the activity to be completed at a later time during the day. For activities that cannot be completed in the same day. See Not Done Activities for more information.

**Team Leader**

In a Teamwork activity, the resource who is being assisted. In the Resource Tree, the arrow points to the Team Leader. See Teamwork on page 27 and Assistant for more information.
Teamwork
An activity that is performed by two resources. One resource is the Team Leader and the other resource is the Assistant. See Team Leader and Assistant for more information.

Technician
A resource that performs technical services on behalf of the company.

Time Slots
Intervals that define when an activity has to be started; this time is typically agreed to between the customer and client.
- A fixed service window defined with a name and label, specifying when certain types of activities can be performed.
- Service Window (if the activity type does not support time slots)

Time View
A view of the day’s activities for the selected resource, group or bucket on a Gantt table. Activities are displayed on timelines, with each activity as a block of time.

Travel Areas
Define the maximum allowed travel territory for a company.

Truck
A default Resource Type. See Resource Type for more information.

Trunk Stock
Inventory carried in a vehicle. See Inventory pools for more information.

Unscheduled Activity
An activity that could take more than one day to complete.

Used
A term in Capacity and Quota management representing the duration of all activities booked for the selected day, time slot or capacity category.

Used Quota Percentage
The percentage of the quota used by the booked activities.
User

A person who uses OFSC, or an entity used for authentication and authorization, allowing people or external software to access OFSC.

Visit

A group of activities that are all performed at the same location on the same day.

Web Services Description Language

WSDL, an XML-based interface description language that is used for describing the functionality offered by a web service. A WSDL description of a web service (also referred to as a WSDL file) provides a machine-readable description of how the service can be called, what parameters it expects, and what data structures it returns.

Work Schedules

Work schedules are templates made up of a combination of shifts and non-working times. When grouped as a work schedule, these shifts and non-working times can be applied all at once to a bucket or to an individual resource. To change, add, or remove Work Schedules, contact Oracle support.

Work Skill

Work skills are sets of skills or competencies that resources are qualified to perform. Companies may have different access levels to affect Work Skills. If you are unable to change, add, or remove Work Skills, contact Oracle support.

Work Skill Conditions

The data that OFSC uses to assign work skills to activities.

Work Skill Levels

OFSC matches resources to activities through shared work skills and work skill levels. As a result, the way you configure work skills and work skill levels has a direct impact on the matches that OFSC creates between resources and activities.

- An activity that a resource is qualified to perform (resource property)
- The qualification required to perform an activity (activity property)

Work Zone

The defined geographical area in which a resource can perform an activity.

Work Zone Dictionary

A screen in OFSC where Work Zones are defined. The Work Zone Dictionary lists all defined work zones and their associated keys. To add, change, or remove work zones, contact Oracle support.