

# Field Service

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## **Using Core Application**

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# Contents

<b>Preface</b>	<b>i</b>
<hr/>	
<b>1 Overview of Oracle Field Service Core Application</b>	<b>1</b>
About the Core Application	1
Supported Browsers	1
Log In	1
Log In Using SSO	1
Reset Your Password	2
Offline Mode Tasks	2
Can I update activities and sync offline after Overnight end time?	4
Services Available	6
Accessibility	6
Keyboard Shortcuts	7
Restart or Reload the Application	8
<b>2 Dispatcher Activities</b>	<b>11</b>
How the User Interface is Organized	11
Dispatch Console Activities	64
Resources	147
Inventory	185
Dashboard Charts and Reports	195
Work Offline	197
Monitoring	199
<b>3 Field Resource Activities</b>	<b>207</b>
Best Practices	207
Start Your Day	207
Field Resource User Interface	216
Workflows	236
Activities	238
Working with Segmentable Activities	270

Use Maps	272
Time View	278
Unrouted Activities	285
Inventory	286
Resources	293
Debrief Plug-In	309
End Your Day	312



# Preface

This preface introduces information sources that can help you use the application and this guide.

## Using Oracle Applications

To find guides for Oracle Applications, go to the [Oracle Help Center](#).

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

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- For web-based user guide, [Web-based User Guide Survey](#)
- For tutorial feedback, [Tutorial Survey](#)



# 1 Overview of Oracle Field Service Core Application

## About the Core Application

The new Oracle Field Service Core Application combines the features of Oracle Field Service Core Manage Service and Oracle Field Service Mobility Cloud Service.

Oracle Field Service Core Manage Service includes the functionality for Dispatchers, Managers, and Administrators and Oracle Field Service Mobility Cloud Service includes the functionality for Field Resources and both the applications are accessed using different URLs. Now, you use a single URL to access the functionality for all these roles. The services available in Oracle Field Service Core Application include Dispatch Console, Routing, Smart Collaboration, Smart Forecasting, Capacity, and Configuration.

## Supported Browsers

Oracle Field Service customers are required to remain on supported web browser platforms to ensure expected functionality and technical support.

The [Oracle Software Web Browser Support Policy](#) defines Oracle Global policy. The specific details for Oracle Field Service supported browsers apply to customers on the latest generally available (GA) release and are available at [Oracle Field Service Browser Support Policy](#).

## Log In

Use `https://<instance_name>.fs.ocs.oraclecloud.com` URL scheme to access Oracle Field Service Core Application. If you want to log in to a specific domain, such as Test or Production, use the corresponding URL.

When you choose an address based on the alternate name, be aware that the address changes if you rename the instance. This is a rare operation, nevertheless you'll have to inform and re-train your users to access the correct instance. Contact your Administrator for your user name and password for the application. All users, including Dispatchers, Administrators, and Field Resources use the same URL to log in to the application. Each type of user has access to different pages, which is controlled by user permissions.

## Log In Using SSO

You can sign in with the single sign-on authentication method, if your organization has configured the SAML or OpenID authentication types.

1. On the **Sign In** page, click **Sign in with SSO**.

Your credentials are redirected to your Identity Provider for authentication. If you have an active session in your Identity Provider, you are authenticated without you having to enter the credentials. If you don't have an active session in your Identity Provider, then you must enter your credentials.

2. If your company has created several Login Policies, type your user name. For example, yourname@yourcompany.com.

3. Click **Continue with SSO**.

Your credentials are redirected to your Identity Provider for authentication. If you have an active session in your Identity Provider, you are authenticated without you having to enter the credentials. If you don't have an active session in your Identity Provider, then you must enter your credentials.

## Reset Your Password

You can reset your password without any assistance from the administrator or someone in the back-office.

1. Click **Can't sign in** on the Login screen.

The **Let's find your account** screen is displayed.

2. Enter your user name.

If your user name is valid, this password recovery email is sent to your email address:

```
"Password request for Oracle Field Service Cloud "  
Your password reset request has been received. Please reset your  
password by clicking this secure link: <link>
```

```
If you did not request a password reset, you can ignore this  
email and continue logging in with your current password.
```

```
Thanks,  
The Oracle Field Service Cloud team
```

3. If you don't get the email, click **Resend email**.

4. Open the email and click the link to recover the password.

The **Reset your password** screen appears.

5. Type the new password twice and click **Submit**.

A confirmation that your password is reset appears.

6. Click **Back to sign in**.

The **Login** screen appears, where you can log in using the new password.

## Offline Mode Tasks

You can access the application features offline, only if you have subscribed to Oracle Field Service Professional, Enterprise, and/or Mobility Cloud Service.

This table lists the tasks that you can and cannot perform offline:

Tasks You Can Perform Offline	Tasks You Cannot Perform Offline
<p><b>For the route, you can:</b></p> <ul style="list-style-type: none"> <li>• Activate/deactivate/reactivate route</li> <li>• Browse the activities list</li> <li>• Print the route</li> <li>• Add activities</li> <li>• Send resource requests</li> <li>• Browse the resource-request list</li> <li>• Browse resource-request details</li> </ul> <p><b>For scheduled activities, you can:</b></p> <ul style="list-style-type: none"> <li>• Change activity order/position in the route</li> <li>• Browse activity details</li> <li>• Edit activity details</li> <li>• Set an activity to started/completed/canceled/delayed/suspended/not done</li> <li>• Delay/adjust time</li> <li>• Create/complete/delay pre-work</li> <li>• Send activity requests</li> <li>• Browse the activity-request list</li> <li>• Browse activity-request details</li> </ul> <p><b>For non-scheduled activities, you can:</b></p> <ul style="list-style-type: none"> <li>• Send activity requests</li> <li>• Cancel activities</li> <li>• Browse activity details</li> <li>• Edit activity details</li> </ul> <p><b>For inventory, you can:</b></p> <ul style="list-style-type: none"> <li>• Browse the inventory list</li> <li>• Browse/edit inventory details</li> <li>• Add/edit/install/deinstall/exchange inventory</li> <li>• Send inventory requests</li> <li>• Browse the inventory-request list</li> <li>• Browse inventory-request details</li> </ul> <p><b>For other tasks, you can:</b></p> <ul style="list-style-type: none"> <li>• Manage activity links (with some constraints)</li> <li>• Search the Parts Catalog (if provisioned and cached)</li> <li>• Work with segmentable activities (however, the number of segments cannot be calculated correctly)</li> </ul>	<p><b>For resources, you cannot:</b></p> <ul style="list-style-type: none"> <li>• Log in/log out</li> </ul> <p><b>Note:</b> If you close and then reopen your browser during the time you are offline but are within the session expiration time, the browser restarts and the offline session resumes. Enter the URL of any page to access the <b>Restore</b> page.</p> <ul style="list-style-type: none"> <li>• Change your password</li> <li>• View maps, directions, or map layers</li> <li>• View calendars</li> <li>• Select a resource or change users</li> <li>• Change options</li> <li>• Manage activities not on today's route</li> <li>• Add a teamwork activity</li> <li>• Reschedule an activity</li> <li>• View nearby activities</li> <li>• View activity history</li> <li>• Download and view thumbnails of files, images, and signatures</li> </ul> <p><b>Note:</b> You can add new files to the activity when you are offline, but they are synchronized only when you are back online. By design Filter restrictions are applied only when you are online. When you are offline, you can only use the options that were loaded in the filter till the time the device went offline.</p> <ul style="list-style-type: none"> <li>• Preview files that are already on the server</li> <li>• Use buttons that are only available for online use</li> <li>• Use Oracle Field Service Collaboration Service</li> <li>• Use Oracle Field Service Smart Location</li> </ul> <p><b>Field managers cannot:</b></p> <p><b>Note:</b> These tasks are in addition to the ones listed above.</p> <ul style="list-style-type: none"> <li>• Move an activity to another resource (when move within a user's route is enabled)</li> <li>• View all resources on the resource selection page if all resources don't fit on a single screen</li> <li>• View the Manage page</li> <li>• Perform resource-management functions including, but not limited to: <ul style="list-style-type: none"> <li>○ Create/edit groups</li> <li>○ Make calendar changes</li> <li>○ Use the team map</li> <li>○ Use the Gantt view</li> </ul> </li> </ul> <p>Access Routing, Capacity, and Forecasting pages</p>

## Can I update activities and sync offline after Overnight end time?

You can complete the activities that you worked on after the Overnight end time. In other words, you can change the status of *Started* activities to a final status and work with the inventory for these activities.

Be aware that the option **Allow update activities and offline sync after overnight within the following number of hours** must be selected on the **Business Rules** page.

Beyond the Overnight end time, the activity and inventory-related links and buttons are displayed just for those activities that are in *Started* status. You can:

- Change activity status to Completed, Suspended, or Not done.
- Perform actions with inventory such as install, deinstall, and so on.

You can perform these actions from the **My Route** and **Activity Details** pages as well as from the activity hints available on the **Manage** and **Dispatch Console** pages. The application collects the data and synchronized to the server. You can perform these actions for single activities as well as segmentable activities and their segments.

**Note:** You cannot start new activities after the Overnight work ends, or manage inventory for activities that are in any other statuses.

### How suspending activity works

Suspending an activity after the Overnight work ends as follows:

- When you suspend a single activity action, the application:
  - Creates a 'Suspended' activity in the route of the original activity.
  - Moves the original activity to the non-scheduled pool, changes its status to 'Pending', and defines its position in route as 'not-ordered'.
- When you suspend a segment of a segmentable activity, the application:
  - Creates a 'Suspended' segment in the route of the original segment.
  - Increases the **Time to complete** value for the master segmentable activity corresponding to the time of the suspended segment.

**Note:** You must enable the **Allow access to non-scheduled pool** setting for the appropriate user types to make the Suspend activity operation work as described earlier.

### Adjusting activity duration

You can adjust the activity duration for both, single activities and segments of segmentable activities.

### Selecting next activity and changing action time

You cannot select the next activity or set an activity's action time in the user interface for the last activity on a given day.

## Inventory actions

The following inventory actions are available for inventories related to the *Started* activities after Overnight end time:

- Add to customer
- Add to required
- Delete inventory
- Install inventory
- Deinstall inventory
- Create installed inventory
- Create deinstalled inventory
- Undo install
- Undo deinstall
- Exchange inventory
- Install required inventory
- Delete required inventory
- Edit required inventory
- Create installed required inventory

Apart from this, you can update the values of any fields or properties through the **Inventory Details** page and any forms connected to this page. Changes to field values on the **Required Inventory** page are also supported.

## Limitations

Inventory actions from an activity of a team holder are not available for an assistant while working in teamwork.

## API support

You can get updates for activities that are still in *Started* status after the Overnight end time and any inventory items related to these activities using the following API calls:

- Events
- Get Activity
- Get Activities
- Get Inventory

## Daily Extract files

The Daily Extract files for a given day won't contain any actions performed after the Overnight end time. You must either wait for the automatic generation of the Daily Extract files for the following day, or run the Daily Extract manually after all the activities are completed. When you do so, you must merge the results from two the Daily Extract files to get the complete data set.

**Note:** Messages from the Outbound API remain blocked after the configured Overnight period.

## Services Available

This topic gives the list of services available in Oracle Field Service Core Application.

this table gives the list of services available and the documents you can access to get more information:

Service	Description	Document
Configuration	Lets you configure the application to suit your business requirements	Administering Oracle Field Service Cloud
Forecasting	Lets you forecast the workload and plan the capacity	Using Forecasting Cloud Service
Capacity	Lets you plan and manage capacity and quota availability for booking	Using Capacity Cloud Service
Routing	Lets you assign activities to resources based on activity location, skill set, and resource work history	Using Routing Cloud Service
Smart Location	Lets you find the location and track the travel patterns of a resource	Using Smart Location Cloud Service

## Accessibility

We recommend that you use the accessibility features provided by your operating system, browser, or your mobile device. People who are visually impaired can use a screen reader to interpret the user interface components. Further, you can use your device settings to change the color contrast and font size.

You can access all the pages by your keyboard. The cursor is available at the first active element of a page, you can move to other elements using the **Tab** key on your keyboard. For more information on how to use keyboard shortcuts, see the Keyboard Shortcuts topic.

Date and time editors are optimized for people with special needs, so that they can easily populate data in the date and time editors. The editors support keyboard navigation and voice assistants, provide access to elements through the keyboard, and introduce instructions for input format.

This table lists the applications that are rich in graphics and/or text, so you can adjust the color contrast (in your operating system or browser) or font size to view these pages:

Module	Text rich	Graphic rich
Oracle Field Service Capacity Cloud Service	No	Yes
Oracle Field Service Core Application	Yes	Yes
Oracle Field Service Collaboration Cloud Service	No	Yes



Module	Text rich	Graphic rich
Oracle Field Service Forecasting Cloud Service	No	Yes
Oracle Field Service Routing Cloud Service	No	Yes
Oracle Field Service Reporting Cloud Service	No	Yes
Oracle Field Service Smart Location Cloud Service	Yes	No
Oracle Field Service Administration Cloud Service	Yes	No

### Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#) website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

## Keyboard Shortcuts

Oracle Field Service is based on Oracle JavaScript Extension Toolkit (JET), which comes with standard keyboard shortcuts. Oracle JET keyboard shortcuts are described in the Oracle JavaScript Extension Toolkit (JET) Keyboard and Touch Reference. This table lists the user-interface elements and the location of their keyboard shortcuts.

Element	Keyboard Shortcut Available At
Push, toggle, and menu buttons	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojButton.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojButton.html</a>
Set of buttons	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojButtonsetOne.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojButtonsetOne.html</a>
Chart	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojChart.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojChart.html</a>
Collapsible header	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojCollapsible.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojCollapsible.html</a>
Color palette or swatch	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojColorPalette.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojColorPalette.html</a>
Table	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojDataGrid.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojDataGrid.html</a>
Date picker	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojDatePicker.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojDatePicker.html</a>
Dialog	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojDialog.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojDialog.html</a>
Gantt chart	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojGantt.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojGantt.html</a>
Element to enter a number	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojInputNumber.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojInputNumber.html</a>
Text box	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojInputText.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojInputText.html</a>
Element to enter time	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojInputTime.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojInputTime.html</a>
Label	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojLabel.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojLabel.html</a>

Drop-down list	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojListView.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojListView.html</a>
Drop-down list	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojMenu.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojMenu.html</a>
Button	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojMenuButton.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojMenuButton.html</a>
Message	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojMessages.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojMessages.html</a>
Nested list	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojNavigationList.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojNavigationList.html</a>
Context menu	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojPopup.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojPopup.html</a>
Progress bar	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojProgress.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojProgress.html</a>
Option buttons	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojRadioset.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojRadioset.html</a>
Meter gauge	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojStatusMeterGauge.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojStatusMeterGauge.html</a>
Switch	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojSwitch.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojSwitch.html</a>
Table	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojTable.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojTable.html</a>
Text area	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojTextArea.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojTextArea.html</a>
Toolbar	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojToolbar.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojToolbar.html</a>
Tree	<a href="https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojTreeView.html">https://docs.oracle.com/en/middleware/jet/6/reference-keyboard-touch/oj.ojTreeView.html</a>

## Restart or Reload the Application

You can restart or reload the application.

Due to server side or in browser functions, a blank screen was displayed when the application did not load. Now, the application will detect such errors arising during the loading process and will try to automatically resolve them. For users this may lead to slightly longer time of loading. However, all the issues cannot be automatically fixed. In such situations, the solution is to reload the application or in some cases clear the cache and restart the application.

Whenever such a situation occurs, the application displays a screen prompting that the application is unable to load:

1. Click **Reload** to reload the application to fix the issue with a simple reload.
2. If that doesn't work, click **Clear the cache and Reload**.
3. This will clear the cache and reload the application thereby, solving all the cases that were causing the issue. This action will clear data related to Oracle Field Service from the device and any such data that was not synced to the server may be lost. You will be redirected to the login page from where you can login to the application as usual. Now, the application will detect such errors arising during the loading process and will try to automatically resolve them.

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# 2 Dispatcher Activities

## How the User Interface is Organized

The user interface is organized into pages, sections, and features, which help you accomplish your daily activities.

This table lists the user interface elements and gives the action you can perform with it.

User Interface Element	Action You Can Perform
Resource tree	Organize the elements of your organization—both personnel and equipment, into hierarchical groups, usually based on geographic location.
Work area	View the resource's schedule in the work area. Expand the Resource tree and select a resource for which you want to view the details.
Lower work area	Drill down the schedule in the work area to review the schedule, and drag and drop tasks from one resource to another.
Menu tabs	Access the frequently-used pages. You can configure the way you want to display the tabs, by choosing a theme on the User options page.

You can use custom properties on any of the Core Application pages. When custom property values exceed 255 bytes, the entire value is shown in the activity details, API responses, and Outbound Messages. Only the first 255 bytes are used for search, visibility conditions, activity inventory list columns and their sorting, and travel, activity duration, visit, Work Zone Keys. If you create a new condition with long values, only the first 255 bytes are used with historic data; all the long values that are added after you create the new condition will use the full set of data.

## Redwood Theme

You can use Oracle's new Redwood theme. When you apply the new Redwood theme, the Core Application shows the new design colors, icons and more.

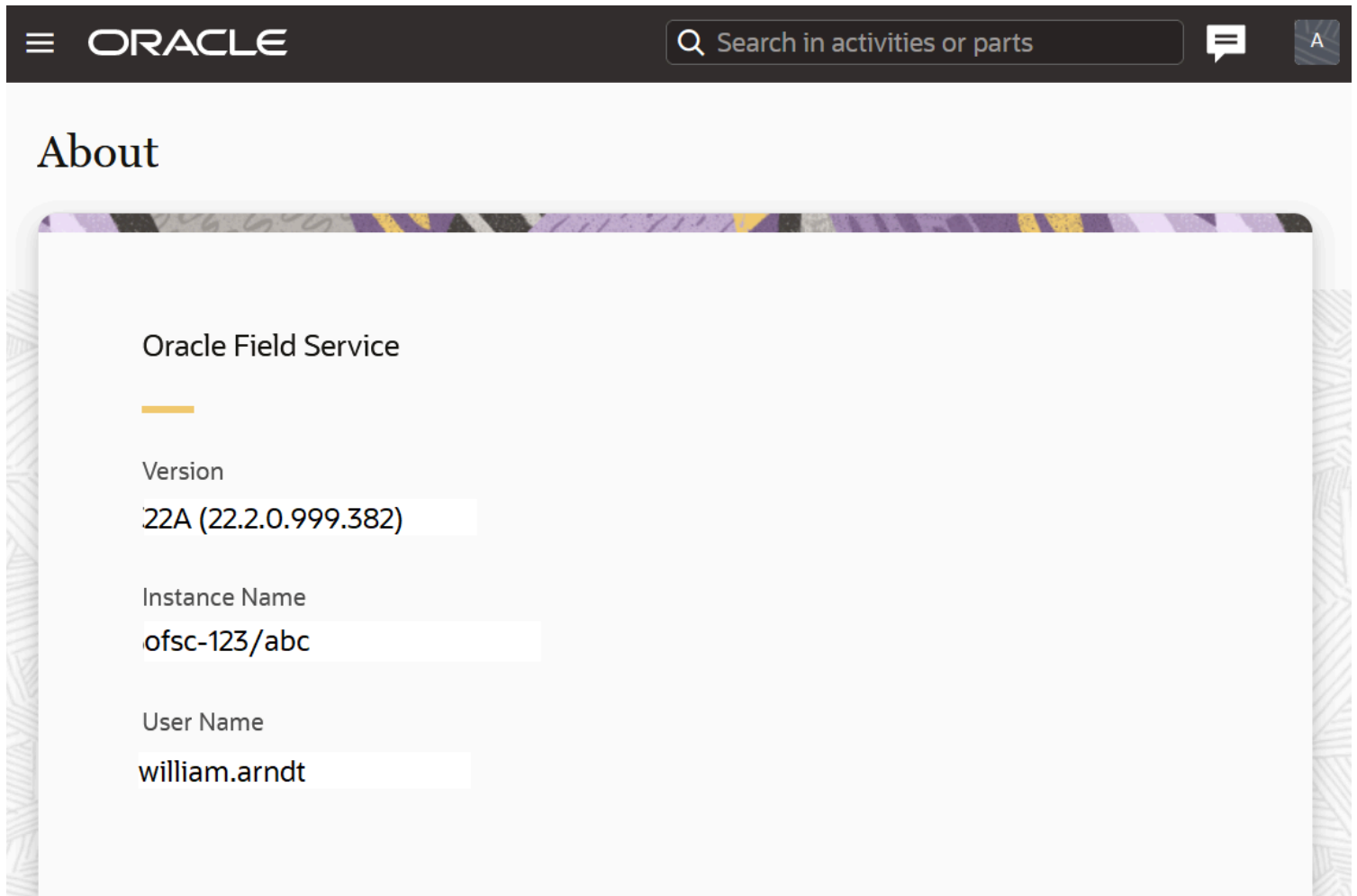
The Redwood theme provides the following characteristics:

- New colors for header with Redwood stripe
- Updated icons in header and action menu
- Changed form for avatar element
- Action bar shows under 'Actions' button on Technician's screens
- Updated fonts and buttons on Technician's screens

### About Page

When the new Redwood theme is applied, the About page will be displayed with a new design based on the Redwood theme. For all existing themes, the older design will be displayed.

This image displays the About page displaying redwood theme when you open it in large-screen devices:



This image displays the About page displaying redwood theme when you open it in small-screen devices.

### Examples of Screens Showing Redwood Theme

Here are example screens showing the latest Redwood theme.

Manage Page on large-screen devices:

This screenshot shows the Manage page in Redwood theme on large screen devices:

The screenshot displays the 'Manage Favorites' interface. On the left, a list of favorites is shown with icons and names: CONNER, Chris (CC); HOLM, Billy (HB); KLINE, Nathan (KN); LOMBARDI, Anton (LA); and RIOS, Alison (RA). On the right, a detailed activity timeline for these favorites is visible, showing tasks such as 'Ware', 'Calibr', 'Corre', 'Correcti', 'Repair', 'Lunch', 'Inspection', and 'Equipment' with associated icons and colors. The date is Thursday, March 31st, 2022, and the time is 7:07:28 AM.

Manage Page for small-screen devices:

This screenshot shows the Manage page in Redwood theme on small screen devices:

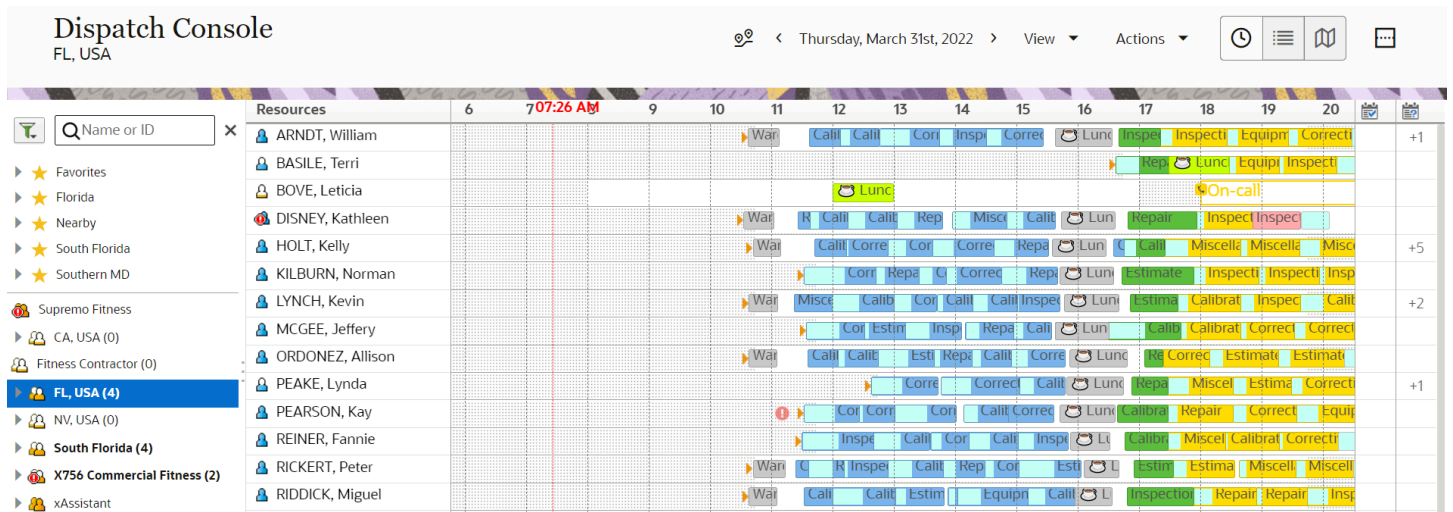
The screenshot shows the Oracle Field Service mobile application interface. At the top, the status bar displays the time 9:18, signal strength, Wi-Fi, and battery icons. Below the status bar is a navigation bar with a hamburger menu icon, a search icon, a chat icon, and a user profile icon labeled 'A'. The main header area contains the text 'Manage' and 'Florida' with a dropdown arrow, and 'Apr 5th' with a dropdown arrow. The main content area displays a calendar view for 'Tuesday, April 5th'. The time slots are labeled '07:07 AM', '8 am', '9 am', and '10'. A vertical red line is overlaid on the screen, passing through the '07:07 AM' slot. Below the calendar, there is a list of technicians and their assigned tasks. Each technician's name is in a colored box on the left, followed by a 'Wareh' box, and then a sequence of task boxes connected by lines. The tasks include 'Coolin', 'Comr', 'Natur', 'Comm', 'Estimat', and 'Water'. The number of tasks assigned to each technician is shown in a brown box on the right: AW (1), BT (0), DK (0), HB (5), KN (0), LK (2), MJ (0), OA (0), and PL (0).

Technician	Tasks	Count
AW	Wareh, Coolin, Coolin, Comr	1
BT		0
DK	Wareh, Na, Coolir, Coolin, Natur	0
HB	Wareh, Cooling, Commer, Comr	5
KN	Comm, Natural, Co, Cor	0
LK	Wareh, Miscella, Cooling, Com, C	2
MJ	Com, Estimat, Water	0
OA	Wareh, Coolin, Cooling, Estir, Natura	0
PL	Comme	0



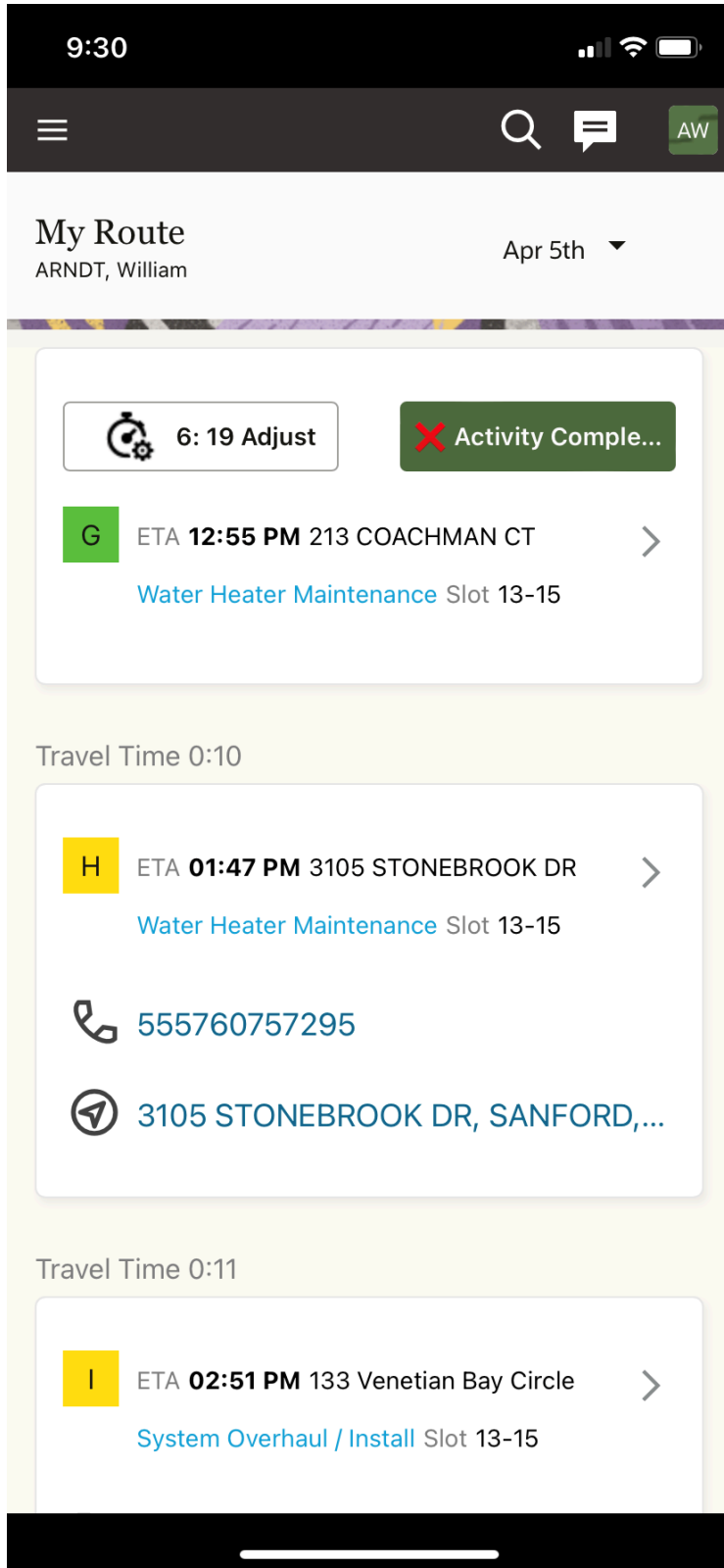
Dispatch Console on large-screen devices:

This screenshot shows the Dispatch Console in Redwood theme on large screen devices:



Landing on small-screen devices

This screenshot shows the landing page in Redwood theme on small screen devices:



The Time view and List view pages in Dispatch Console now display in Redwood style to provide better user experience. This feature includes these user interface changes in the Dispatch Console:

- **Time view changes.**

The application now displays the Time view with these changes:

- The header of the Gantt chart is aligned with the Manage page.
- The non-scheduled and not ordered icons have been updated to the Redwood style.
- The horizontal scroll bar uses the full width when regular scrollbars are enabled in the OS. (By default, overlay scrollbars are used.)

- **List View**

The application now displays the List view with these changes:

- The table header design was updated to the Redwood style.
- The check boxes that allow activity selection were updated to the Redwood style.

- **Dialog Boxes**

Here are the changes:

- The dialog boxes on the Dispatch Console containing the frame and buttons appear in Redwood style.
- This image shows the dialog windows in Redwood style:
- The dialog windows appear in Redwood style and include the Change group of activities and Cancel group of activities dialog boxes.

## Activity and Inventory Types Tables

Starting Update 22C, the Activity Types and Inventory Types table pages are available as standard Redwood tables. The progressing loading approach used for scrolling down these tables allow you to navigate to those items not currently displayed on the page.

- **Activity Types page**

The Activity Types page offers these functions:

- Add new activity type
- Modify activity type
- Clone activity type
- Group actions - Delete, Activate, Deactivate, Set color

- **Inventory Types page**

The Inventory Types page offers these functions:

- Add new inventory type
- Modify inventory type
- Adding/modifying activity or inventory type

When creating or modifying an activity, you see the same look and feel as other pages within the application.

You can configure all of the necessary settings for all types as you did previously. When you view the configuration of a specific Activity type, you can toggle the related time slots for that Activity type easily. Each time slot is presented with its status to provide better visibility of the availability of the time slots that can be chosen.

- **Group actions - Deactivate, Activate**

The application visualizes group actions as Redwood dialog boxes.

Here are some examples for such pages:

- Activate activity type group action dialog box
- Deactivate activity type group action dialog box
- Set color group action dialog box

However, the Set color dialog box differs slightly from other informational pages. On Set color dialog box, you can set colors for specified activity types by choosing colors using the color picker or by defining them manually.

- **Groups Page**

A new page to view and manage activity type groups is available now. This new page consists of the list of available activity type groups, making their configuration easier and transparent.

These actions are available from the Group page:

- Add new group
- Modify group
- Adding/modifying a group

The page to add or modify an activity type group offers a set of required and optional fields. Similar to previous releases, the functionality to delete a group is not available within the application.

- Filtering activity types by groups

To filter activity types by groups, use the filtering options under the 'View' drop-down menu, located on the header of the Activity types page.

## Resource Tree

You can use the *resource tree* to see a hierarchical view of your organization's resources, typically sorted by geographical region. The resource tree displays to the left of the page.

You can hide or unhide the resource tree using the pin icon. This is how the resource tree with pin button is displayed:

# Dispatch Console

FL, USA ▲



- ▶ ★ Favorites
- ▶ ★ Florida
- ▶ ★ Nearby
- ▶ ★ South Florida
- ▶ ★ Southern MD

◀ Supremo Fitness

▶ CA, USA (0)

Fitness Contractor (0)

◀ **FL, USA (77)**

▶ ACME Contractor

▶ Cranes



When you select a resource from the resource tree, the resource’s activities display in the work area on the right. You can expand and collapse the resource tree entities using the forward and down arrows.

Here are the resource types and the roles that each item in the resource tree performs:

- **Field resource:** This resource can perform work, has work skills, associated work zones, and has a related user that is an actual person, or a crew, or people performing work.
- **Vehicle:** This resource can have work skills, inventory, and geolocation tracking enabled. When assigned to a team it may add the required work skills and inventory to be used by the team.
- **Tool:** This resource represents specific tools such as 30-foot ladder and excavator. This resource can have work skills, inventory, and geolocation tracking enabled. When assigned to a team it may add the required work skills and inventory to be used by the team.
- **Bucket:** This resource is used to accumulate work that is not yet distributed to field resources. Only the application can assign activities to this resource. This resource is used for Quota Management.
- **Organization unit:** This resource aggregates field resources, vehicles, and tools in the tree-like hierarchy to simplify management and reporting. This resource is used for Quota Management.




## Resource Tree Icons

You can identify the resource tree elements based on the shape of their icons.

**double silhouette:** This designates a *bucket* or an *organization unit*. Buckets generally have numbers to the right of them, while groups don't.

**single silhouette:** This designates a mobile employee, a resource, a truck or equipment. Technician resources also have numbers to the right of them indicating the pending activities remaining, and the total activities assigned.

The color of the icons indicates the status of the resource’s queue:

Icon colors	
	Yellow – Resource does not have a route or the route is inactive.
	Blue – The route is activated. (The resource is working.)
	Grey – Route is deactivated or completed. (Resource has finished working for the day).

You can display the icon and the queue status in the resource hint. Your administrator configures these on the **Screen Configuration** page. Additional symbols appear for certain exception situations. For example, a grey box indicates a non-working resource.

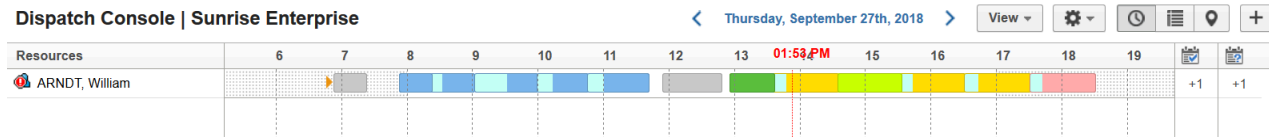
### Related Topics

- [Resource Tree Alerts](#)

## Work Area

You can see the details of a resource that you select in the resource tree, in the work area. When you click a menu tab, you see the corresponding information for the resource in the work area. Across the top of the work area are several buttons. Use these buttons to access features such as filtering the details and viewing details for multiple days.

The work area is shown in this screenshot:

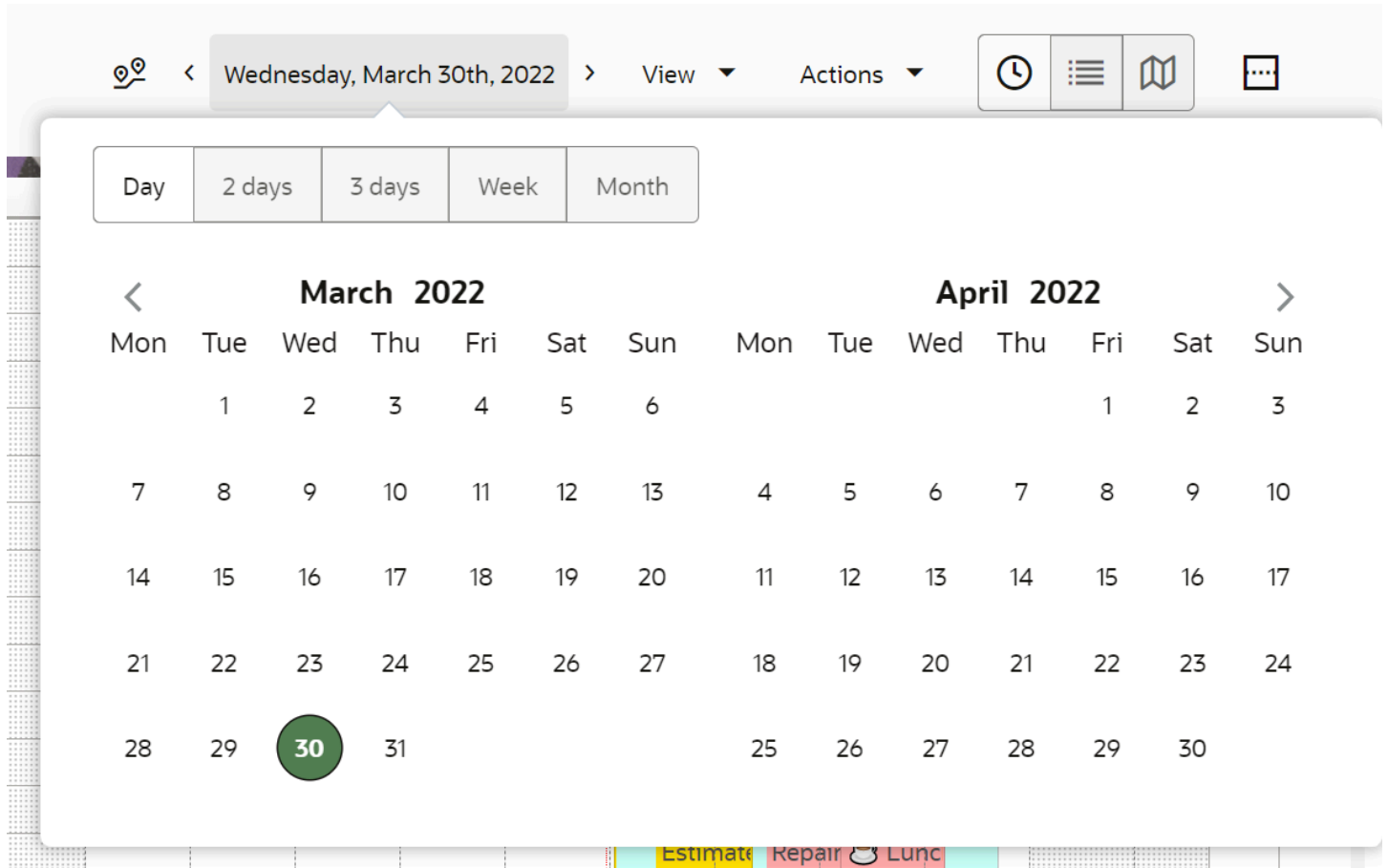


## Date Field

You can select a date from the date field to view the activities of the resource for that day

< Wednesday, March 30th, 2022 >

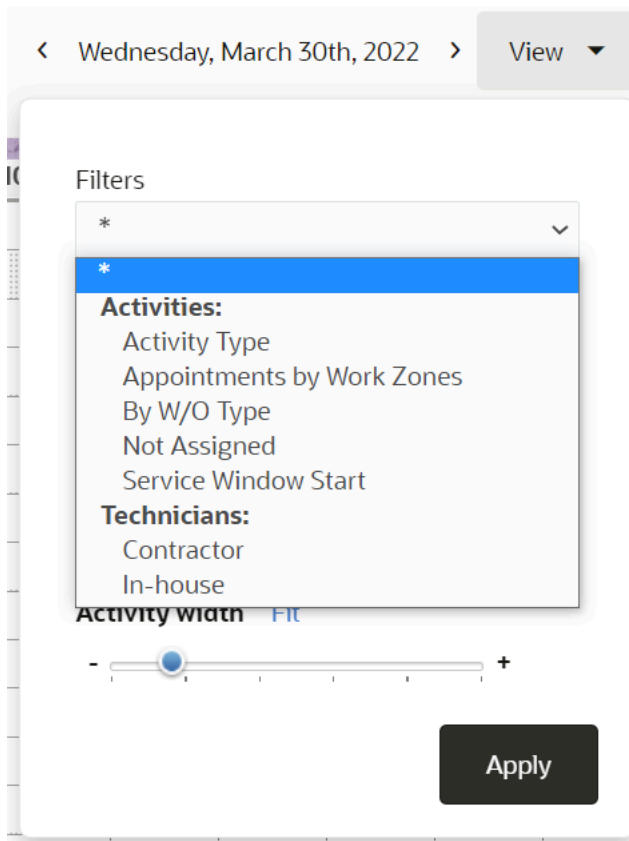
If you select a time interval and a start date on the calendar, you see the activities for the time interval, from the start date. Use the arrows to move forward or back in time on the calendar, as shown in this screenshot:



## View Button

You can fine-tune the information that you see in the work area with the **View** button. The **View** button displays a list of configured filters as shown in this screenshot:

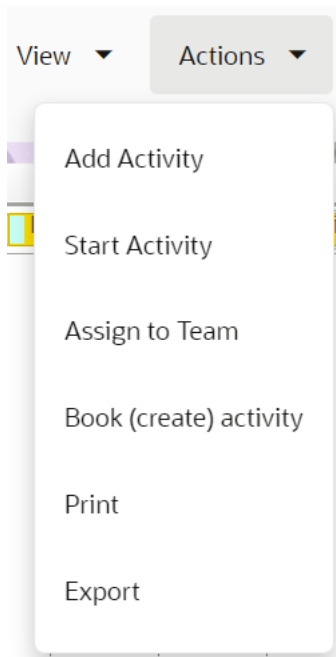




Choose a configured filter from the drop-down list or sort the data using the check boxes. You can create custom filters. To view all activities and resources below the selected Resource Type in the resource tree, select the **Apply Hierarchically** check box. The Show resource trace check box is displayed only if you have purchased Oracle Field Service Smart Location.

## Action Button

Use the **Action** button (gear icon) to perform actions such as adding an activity, activating a route, or starting an activity. These actions affect the information in the work area. Here is how the Action button looks on the Dispatch Console:



Your User Type, the page you are viewing, and your settings determine the actions that you can see in the drop-down list. Depending on your configuration, these same links can be visible in the hints.

## View the Lower Work Area Panel

If you want to view day-level or week-level details and at the same time, drill-down the details for a specific entity, you can do so using the lower work area panel. In the lower work area panel, you can see the details of an entity selected either in the upper panel or in the resource tree.

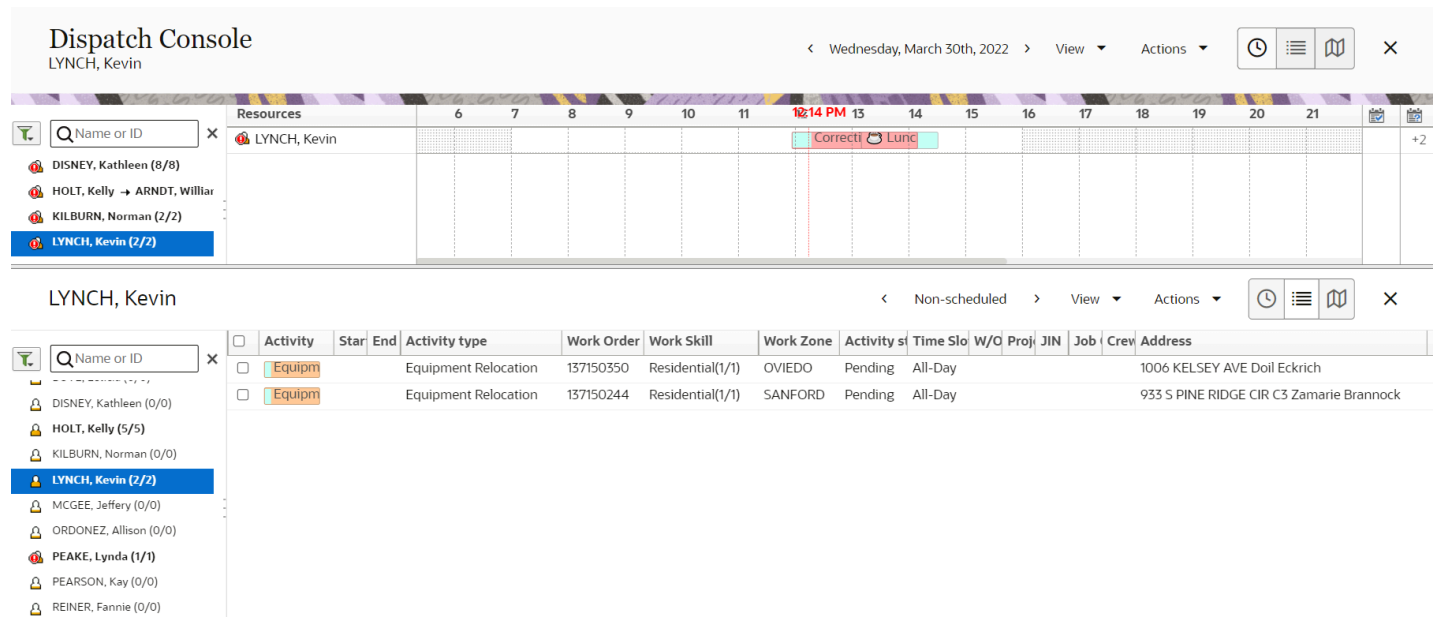
You can drill down to display the route information for any resource, bucket, or group selected in the upper panel. For example, if you select a resource in the upper panel, you can see the scheduled or non-scheduled activities for that resource in the lower work area.

As you can access the Resource Tree directly from the lower work area, you can use it to search and display information independent of the display in the upper panel. This way, you can have a detailed comparison of the resource availability in two panels.

Follow these steps to view the lower work area:

1. Navigate to Time view.
2. Select an entity from the Resource Tree.
3. View the resources displayed in the upper panel.
4. Select a resource from the upper panel.
5. Click [+]. The resource's schedule is displayed in the lower work area.
6. **Optional:** Drag and drop the display in the lower work area to the upper panel.
7. **Optional:** Repeat steps 2-4 in the lower work area to select and view the schedule of a second resource in the bottom panel.
8. **Optional:** Compare the two panels to identify the resource that meets your requirements.

This is how the two panels of the Dispatch Console are displayed:



## Screen Layout Optimization

If you are using a large monitor, you can view the pages in optimized layout.

This means you can view more information on a single page without having the need to navigate to other pages. If you are using the Core Application on a mobile device, the pages remain optimized for touch interaction.

### Search Results Actions

As a Dispatcher, when you search for activities in order to inspect details, adjust data, or perform some actions with the activities, you'll find display links in activity hints of the search results. This makes it easy for you to perform an action on the activity directly from the search results rather than navigating to each page separately.

**Note:** When you search for activities on other pages, the links in activity hints won't be visible.

## Resource and Activity Views

You can identify at a glance, the location of your resources and the status of their routes in three ways.

- *Time view* - A Gantt table that displays the activities for the selected resource, group, or bucket in timelines, with activities shown as blocks of time.

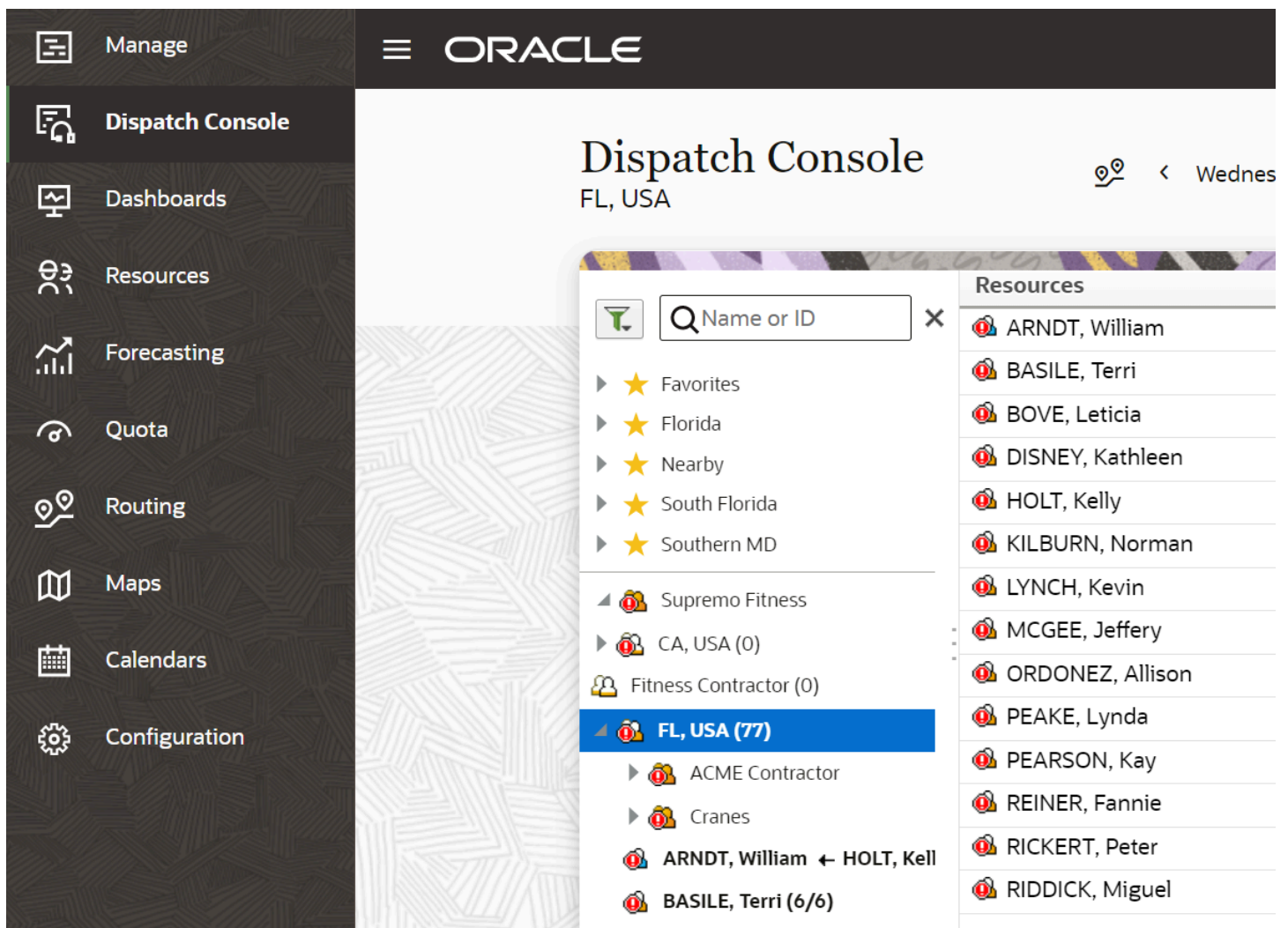
- *List view* - A chronological list of the day's activities for the selected resource, group, or bucket. Activities are ordered by estimated start time.
- *Map view* - A map that shows the day's activities.

## Menu Tabs

You can access the important functions that you use frequently, from the Main menu. The options in the Main menu are based on your user type and are configured by your administrator.

As a Dispatcher, you typically perform most of the work in the **Dispatch Console**. The items you see listed for your company's configuration may be different based on your *user type*.

This screenshot shows the Main menu and resource tree:















## Color Codes

You can determine the status of the day's activities quickly, as the activities are classified by color codes.

This table explains the default colors and their corresponding statuses:

**Note:** You can change the color codes during implementation to show the colors that your company prefers.

Color code	Status
 Color: Yellow; Hex: FFDE00	Pending activity (on time)
 Color: Blue; Hex: 79B6EB	Completed activity
 Color: Pink; Hex: FFAAAA	Pending activity (in jeopardy of being late)
 Color: Electric blue; Hex: 99FFFF	Suspended activity or teamwork
 Color: Turquoise; Hex: 60CECE	Not done activity
 Color: Light Orange; Hex: FFCC99	Not ordered activity
 Color: Green; Hex: 5DBE3F	Started activity or teamwork
 Color: Light green; Hex: 80FF80	Canceled activity or teamwork
 Color: Humming Bird; Hex: COFFEE	Travel time
 Color: ; Hex:	Pending internal activity or teamwork
 Color: ; Hex:	Ended activity
	Pre-work, or re-opened activity

The colors are consistent through all the views. For example, started activities are always green whether you are in **List** view, **Time** view or **Map** view.

## Time View

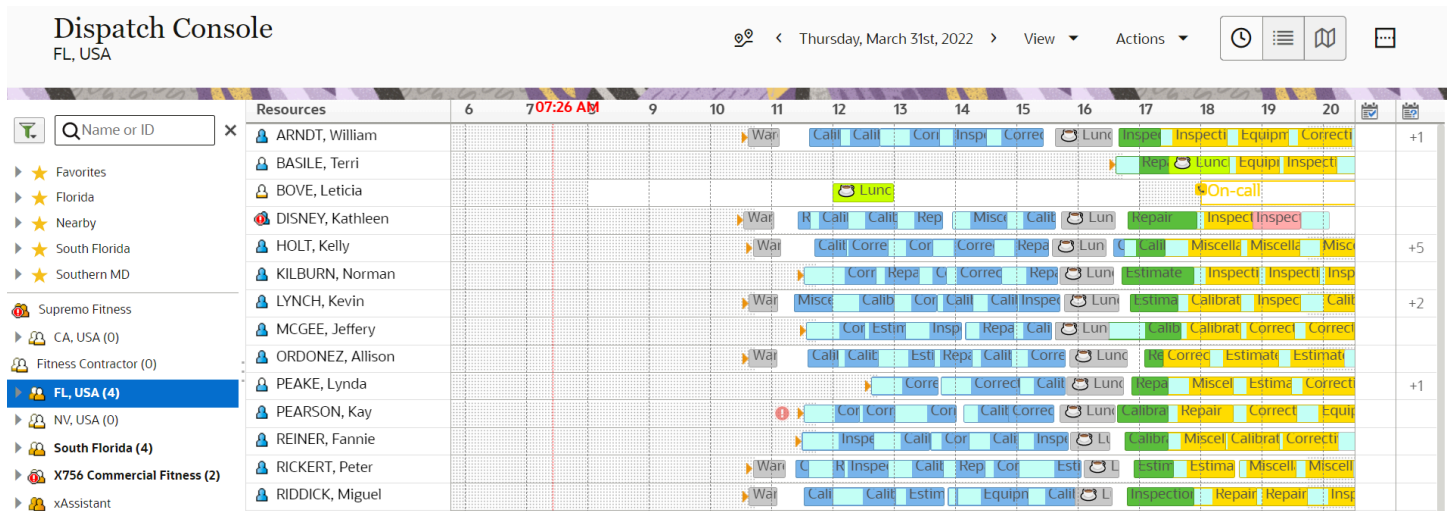
As a dispatcher, you can get an instant picture of the day in real time, on the Time view. The Time view is a Gantt table where you see the activities for the selected resource, group, or bucket.

You see the activities as blocks of time and you can also see multiple routes in one view. The length of a travel bar on the Time view is based on the travel time between two consecutive activities in a route ('travel' field). The Time view displays:

- All the field resources that are inside the organization unit or bucket that are directly selected for the favorite group.
- All the field resources that are directly selected for the favorite group.

- All the field resources that are from the outside and have at least one work zone that is the same as those assigned to an organization unit or bucket inside the favorite group.

You can access the Time view by clicking the *Time View button*, as shown in this screenshot:



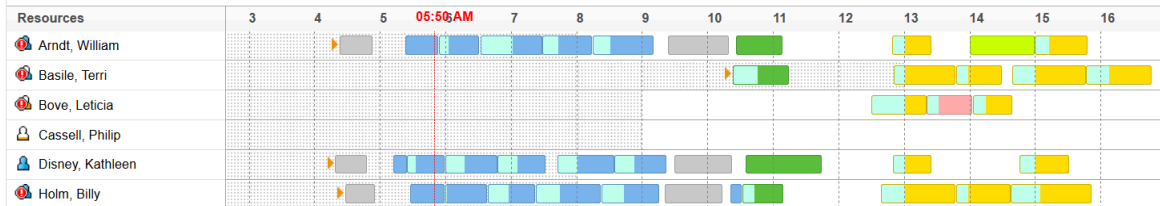
In the example mentioned earlier:

- **Zoom In/Out:** You can slide the slider under **View**, to the right to zoom in and to the left to zoom out. Then click Fit.
- **Time Scale:** The time scale shows the distribution of time and activities over the hours of the workday.
- **Current Time:** The current time is represented by a dotted red line and the time is displayed at the top end of the line. You can move your mouse along the time scale to identify specific times that an activity started or ended. A blue line appears at the mouse pointer, called the inspect line. The current time reference line is displayed based on these guidelines:
  - Time View does not scroll, if the current time reference line is available when a page opens. The visible part of Time View starts at the start of the day.
  - Time View scrolls to the right, if the current time reference line is not available when a page opens and the current time falls within a range of 'start' and 'end' parameters. The visible part of Time View is scrolled to a position in which the current time reference line is shown at the right side of the page.
  - Time View does not scroll, if the current time reference line is not available when a page opens and the current time is later than the 'end' parameter.
- **Activation Time:** The orange triangles at the beginning of each shift represent the actual times that resources activated their routes.
- **Deactivation Time:** The orange triangles at the end of each shift represent the actual times that resources deactivated their routes.
- **Non-working Time:** The grey blocks of time at the beginning and end of each route represent the non-working time based on the hours set in the resource's calendar.

The colors indicate the status of each activity. Pending (and on time) activities are yellow, while green means that the activity has started. Pink indicates a risk that the resource will now be late. These colors are consistent from one view to another as well as on the resource's mobile device. The colors in the screenshots given here are default colors, you can

change them per your organization's requirements. Further, you can display the activity status in the activity hint. You configure the activity hint in the **Screen configuration** page.

An exclamation mark on a resource silhouette indicates an alert, and the activities in pink are the activities that are in jeopardy as shown in this screenshot:



Five of the routes shown above include activities that are currently in jeopardy.

In most cases, Oracle Field Service uses the actual travel time reported by technicians. However, sometimes, the application uses the estimated travel time. The application verifies these conditions to decide whether the estimated travel time can be used as actual travel time:

- If an activity has the "Expected idle time" attribute, then whether the actual travel time is greater than the estimated time.
- The "Expected idle time" is true, if at least one of these conditions is met:
  - The activity has a service window AND the activity is assigned (scheduled) to the service window start time.
  - The activity has a SLA window AND the activity is assigned (scheduled) to the SLA start time.
  - There is a finish-to-start, a start-to-start, or a simultaneous link. The start time of this activity depends on another activity, AND according to this link, ETA is equal to the minimum allowed value.

### Temporarily Assigned Resources

If a field resource is temporarily assigned to the current work zone you are viewing, the working time of the resource is outlined by the green box with a green arrow icon pointing inside the box. Similarly, if a field resource belongs to the current work zone you are viewing, but is temporarily assigned to a different work zone, the working time of the resource is outlined by a gray box with a gray arrow icon pointing outside the box. You can view these resources only when:

- You have selected **Show temporarily assigned resources** for the favorites group to which the field resource belongs.
- You have drilled down the resource tree to the organization unit or bucket to which the field resource is assigned temporarily.

Further, a temporarily-assigned field resource with a non-working day is not displayed in the **Time view** by default. You must select **Show Not-Working** in the **View** menu to see such field resources.

### Related Topics

- [Activity Alerts](#)
- [Resource Tree Alerts](#)



## Month View

You can use the Month view to see the activities scheduled for 30 or 31 days, depending on the month, starting from the selected day.

You can see these items on the Month view:

- The activities scheduled for the month.
- Activity labels.
- Icons and/or shift names for on-call shifts.

### How Activities are Displayed

The shape and colors of activities are same in the Week and Month views. In the Month view, you can see the daily activities at the work day/work schedule level, instead of the time level. So, if two resources have different start times, you see their starting activities at the same level.

**Note:** Accessing all 30 days in a single view requires a 4K display or a multi-monitor configuration. When smaller screens are used, it is expected behavior that you scroll for the Week or Month views.

For the activities that are shorter than 1/4th of the resource schedule length, or don't fit to either 1/4th, 1/2, or 3/4th of the resource schedule length, you see a condensed view with striped bars. You can click the condensed activity view to see the activity details and the activity hint. You see a segmentable activity that ends at the end of the previous day and starts at the beginning of the next day, as a single activity over multiple days. You can move activities by dragging and dropping them. If the activity is hidden inside the stripped bar, open the hint and then drag the activity to the required place. Or you could drag-and-drop the whole multi-activity block.

Displaying the Month view for large buckets, or routes that have more than 20 activities per resource per day may take additional time to render. It is recommended that you use this view when there are fewer than 20 resources to be presented. The rules for displaying activities in the Month view are:

- Mass repeating activities (for example, lunches) are not shown.
- Non-ordered activities are not shown.
- Segmentable activities that end at the end of the work day and continue the beginning of the next day are shown as a single activity over multiple days.
- If there are more than 10 activities, "and 'n' more" link is displayed.
- When a resource has non-working days, they're shown as dotted pattern.
- The **On-call** filter in the **View** menu shows only those resources that have an On-Call shift assigned with no working calendar, and it shows resources with a working calendar that are not On-call.
- When you split the panels, it is possible to configure each panel with a different start date for the Month view.
- When the period covers different months, the month names are shown at the very top row.
- Activities that don't fit into 1/4, 1/2, or 3/4 of the workday length are shown as multi-activities (striped bar) using these rules:
  - If there is a single activity that has a duration between 70% and 100% of 1/4th of the day, it is shown as 1/4th of the day activity, as a solid bar.
  - If there is a single activity that has a duration between 70% and 100% of 1/2 of the day, it is shown as 1/2 of the day activity, as a solid bar.
  - If there is a single activity that has a duration between 70% and 100% of 3/4 of the day, it is shown as 3/4th of the day activity, as a solid bar.



- If there is a single activity that has a duration between 70% and 100% of the day, it is shown as the whole day activity, as a solid bar.
- Otherwise the activity is shown as a part of a striped bar.

For example: Suppose that a work day for a technician starts at 8:00 AM and the work day duration is 8 hours. In this case, the activities starting at 8:00 AM and finishing at 10:00 AM (2h = 1/4 of the work day duration), starting at 10:00 AM and finishing at 2:00 PM (4h = 1/2 of the work day duration), or starting at 10:00 AM and finishing at 4:00 PM (6h = 3/4 of the work day duration) are shown as single activities. But the activities starting at 9:00 AM and finishing at 10:00 AM (1h = 50% of 1/4th of 8h work day) and starting at 11:00 AM and finishing at 1:30 PM (2.5h is more than 100% of 1/4th of 8h work day, but less than 70% of 1/2nd of 8h work day) are shown as a multi-activity.

### How Activity Labels and On-Call Shift Icons are Displayed

Your administrator must configure the labels on the **Configuration > Screen configuration > Application screens > Activity time view label** page. These are the guidelines based on which the activity labels and on-call shift icons display.

- Single activities and segmentable activities are now shown with the corresponding labels. If a segmentable activity is shown as two or more segments, you can highlight all the segments by pointing to one of the segments.
- When multiple activities are shown, it is possible that only the first few characters of the label appear. To view the complete information, click the individual activity hint.
- If there are no activities for a given day, and an on-call shift exists, the on-call shift is shown for the whole width of the day cell.
- If activities are planned for an on-call shift day, the shift shows as an icon. The icon appears before the activities, if the shift starts before the last activity for the day ends. The icon appears after the activities, if the on-call shift starts after the last activity for the day ends.
- When both on-call and activities are shown, the name of the on-call shift may not appear. To view the complete information of the shift, click the shift hint.
- Let's say the shift is shown as an icon, or the name of the shift is truncated due to its length. You can click the shift icon to see the full name of the shift, its start and end time as a tool tip.
- If a resource doesn't have activities, but has an on-call shift for a given day, the on-call shift icon and the shift name are shown. If a resource has one or more activities and an on-call shift, the on-call shift is shown only as an icon.

## Configure List View

You can use the List view to get a chronological list of the day's activities for the selected resource, group, or bucket. Activities are ordered by estimated start time. Use this view when you want to see both, the daily schedule and the related details all at once. You can rearrange as well as show and hide the columns in this view. The length of a travel bar on the List view is based on the 'Continuous traveling time' setting.

1. Open **List** view and click the wrench icon in the upper right corner.  
The **List Columns Configuration** dialog box displays and shows the options configured for your user type:

## List Columns Configuration

### List visibility rules

You can select fields you need to see, define their order and disable word wrap

1	<input type="checkbox"/>	Resource	↔	⋮
2	<input checked="" type="checkbox"/>	Start	↔	⋮
3	<input checked="" type="checkbox"/>	End	↔	⋮
4	<input checked="" type="checkbox"/>	Activity type	↔	⋮
5	<input checked="" type="checkbox"/>	Work Order	↔	⋮
6	<input type="checkbox"/>	Work Order Number	↔	⋮
7	<input checked="" type="checkbox"/>	Work Skill	↔	⋮
8	<input checked="" type="checkbox"/>	Work Zone	↔	⋮
9	<input checked="" type="checkbox"/>	Activity status	↔	⋮
10	<input checked="" type="checkbox"/>	Time Slot	↔	⋮
11	<input checked="" type="checkbox"/>	W/O Type	↔	⋮
12	<input checked="" type="checkbox"/>	Project ID	↔	⋮
13	<input checked="" type="checkbox"/>	JIN	↔	⋮
14	<input checked="" type="checkbox"/>	Job Quotation Number	↔	⋮
15	<input checked="" type="checkbox"/>	Crew Size	↔	⋮

2. Check the boxes for the columns you want to see. To hide a column, clear the check box.
3. Drag and drop the columns to change their order.
4. Use the blue double-headed arrow to disable word wrapping in a particular column.

## Map View

You can use the **Map view** to see the day's activities, the trace of a resource's route, the resources near another resource, non-scheduled and not assigned activities. Not only can you see the activities for the selected resource on the map, you can also see them in a chronological list on the right of the page. Further, you can see the non-scheduled and not assigned activities with the map markers that your administrator has configured.

This screenshot shows the **Map view** for a resource. This view shows not only the activities the resource needs to perform, it also shows the route the resource can take to reach the activity location:

The map view uses the same color codes as the other views.

The map view displays the activities for addresses that can be found. Resolved addresses are assigned either a letter (as shown above) or a plus (+) sign. If the address cannot be found, the activity appears in the list without a letter, or a plus sign next to it. The GPS travel related complaints and alerts are disabled for activities that have multiple traveling time segments. If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown.

Activities for the selected resource appear on the map in the center of the page and are also displayed in chronological order on the right side of the page. This is useful when you want to see the activities in relation to the route. The map view shows you the distribution of activities within a geographical region, so that you can picture how the resource gets to each stop on the route. A red border around an activity marker indicates that the activity is located outside of the company boundaries, which are configured in **Business Rules**. The coordinate status of this activity may show as invalid.

## Manage Page

Dispatchers and supervisors can use the **Manage** page to view the activities for a group of field resources for the selected date. The group can be a specific organization unit, bucket, or a favorite group.

You can view these on the **Manage** page for each field resource:

- Scheduled and non-scheduled activities
- Online or offline status
- Working hours

You can see the avatar of field resources and their online or offline status on the Manage page. A green dot indicates that the resource is online and a white dot with a gray outline indicates that the user is offline.

### Temporarily Assigned Resources

If a field resource is temporarily assigned to the current group you are viewing, the working time of the resource is outlined by the green box with a green arrow icon pointing inside the box. Similarly, if a field resource belongs to the current group you are viewing, but is temporarily assigned to a different work zone, the working time of the resource is outlined by a gray box with a gray arrow icon pointing outside the box. You can view these resources only when:

- You have selected **Show temporarily assigned resources** for the favorites group to which the field resource belongs.
- You have selected the organization unit or bucket to which the field resource is assigned temporarily.

## Non-Scheduled and Not Assigned Activity Map Markers

You can use activity map markers to differentiate between activities, or filter specific non-scheduled and not assigned activities on the Scheduling layer on the Route map and on the Dispatch Console map.

Your administrator configures the activity markers by associating predefined shapes with filter conditions. For example, you can have a star to indicate installation activities, or a square for maintenance activities. These markers display for not assigned and non-scheduled activities on the Scheduling layer of the Route map and for non-scheduled activities on the Dispatch Console map.

## Default Markers: Urgent and Other Activities

By default, two markers are available:

- **Urgent activities:** Activities that are urgent. These are displayed as big red circles on the map. The property for urgent are considered based on the Activity priority setting on the Business Rules page. If the property for Urgent activity is not configured, then the red marker does not appear on the map. However, the 'Urgent' item remains on 'Activity map markers' window.
- **Other:** Activities that are not urgent and do not meet any filter conditions associated with markers. They are displayed as yellow small circles or small pink circles on the map, when the activity is under risk.

**Note:** Activities under risk that are displayed as pink markers have higher priority than the normal activities with a configured marker.

## Invalid and Unavailable Filters

Let's say you configure a filter for a marker and then change the conditions for the filter on the Add filter or Modify filter page. The filter is invalid when:

- You change the properties in the filter conditions on the Add filter or Modify filter page.
- You delete the filter conditions.

- You add a new dynamic filter condition on the Add filter or Modify filter page and do not populate a value for it on the 'Activity map markers' page.

If a filter is invalid, then:

- The configuration item (marker and filter) is not applied to the activities on the map.
- The item is highlighted on the **Business Rules** page and the **Activity map markers** dialog box with the message, 'Wrong filter' in red.

### Filter Unavailable for a User Type

Let's say a filter is not available for a User Type, that is, the filter is not added to **Selected** box on the **Add filter** or **Modify filter** dialog box. Then, the associated marker doesn't display on the map for the users of such User Type. Further, if the activity matches the filter conditions, a marker with a lower priority is applied. If no filter matches, then the (Other) marker is used.

## How a Marker is Determined for Activities in a Cluster

When multiple activities cluster on the map, the marker for the activities is determined based on the priority of the marker. The examples given here show how markers are determined—the result described here is based on the descriptions given in the Default Markers: Urgent and Other Activities topic.

Consider the activity map markers, as shown in this screenshot:

**Non-scheduled and Scheduling layer map markers**  
The following markers will be used for non-scheduled activities on the Dispatch Console Map and for not assigned and non-scheduled activities in the Scheduling Layer. Higher priority markers will be displayed on the map when activities are clustered by close proximity.

Priority	Marker	Filter
1		Urgent
2		New installation
3		Days to SLA: 2
4		Deinstalls
5		(Other)

Activities under risk that are displayed as pink markers have higher priority than normal activities with configured markers.

### Example 1

- Activity 1 meets 'New installation' filter conditions and is not under risk.
- Activity 2 does not meet any filter conditions and is under risk.

Result on the map: Activity 2 marker is displayed.

### Example 2

- Activity 1 meets 'New installation' filter conditions and is not under risk.
- Activity 2 meets only 'Days to SLA: 2' filter conditions and is under risk.

Result on the map: Activity 2 marker is displayed.

### Example 3

- Activity 1 meets criteria for Urgent activities.
- Activity 2 meets 'New installation' filter conditions and is under risk.

Result on the map: Activity 1 marker is displayed.

## Display Activity Markers on the Map

You can display activity markers on the map, to differentiate between activities, and to view specific activities such as activities that are at risk.

1. To view the markers for non-scheduled activities in the Dispatch Console:
  - a. Go to **Dispatch Console**.
  - b. Click a bucket or group in the Resource tree.
  - c. Click the **Map** icon and then select **Non-Scheduled** or **Not Assigned**.
2. To view the markers on the Route map:
  - a. Click a bucket or group icon on the Resource tree.
  - b. In the hint, click the **Route** icon.
  - c. Click the map icon and then select the **Scheduling layer**.

### Results:

Higher priority markers display on the map, when these two conditions satisfy:

- There are many activities in the same location, or activities are displayed in a clustered location.
- Activities have different map marker priorities.

Markers with different priorities display separately in clustered locations as you zoom in on the map, unless the location is the same. Activities that are under risk and are displayed as pink markers have higher priority than normal activities with configured markers. When an activity has no resolved coordinates, then it is marked with a crossed bubble in the right panel.

## Distinguish Between Non-Scheduled and Not Assigned Activity Map Markers

The Dispatch Console Map displays both, non-scheduled and not assigned activities with map markers.

It can be difficult for you to distinguish one from the other. So, the best practice is to configure different markers for non-scheduled and not assigned activities. For this, create a filter and use the 'Activity scheduled? [is\_activity\_scheduled]' property for the filter condition. You can configure it as a single condition or in combination with another condition.

## Resource Track Highlighting

You can analyze a resource track in the Map View by viewing the route between resources and by highlighting a specific part of a track. When you hover over a breadcrumb on the map, the application highlights the part of the track that contains the selected breadcrumb. When you hover over any activity marker on the map, the application highlights the track between the previous and selected activities and mutes the non-related tracks. This lets you see the track between two locations.

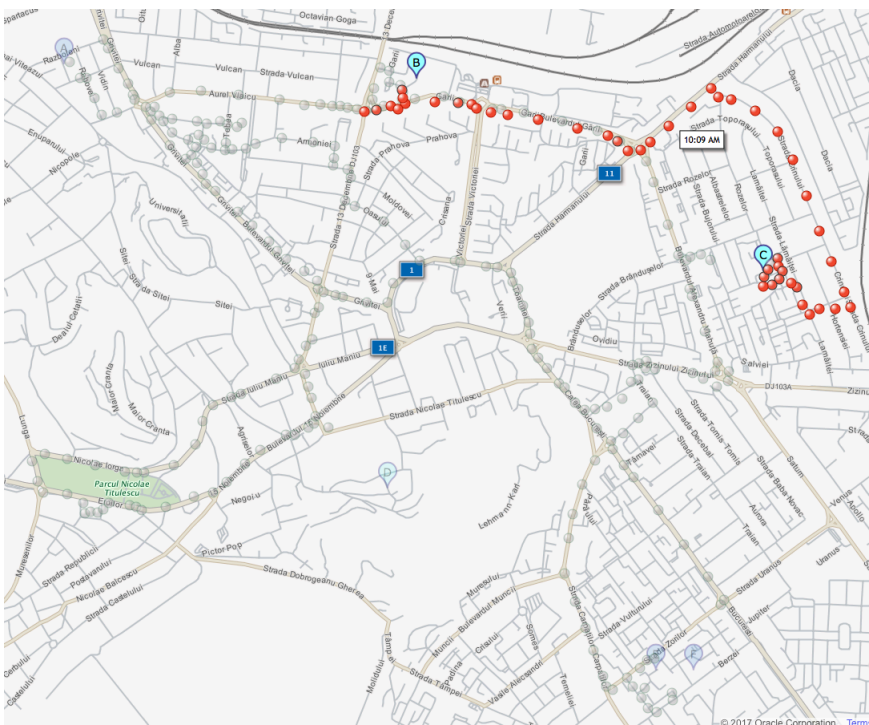
**Note:** If your organization has enabled the **Limit location gathering to installed Android or iOS applications** setting on the **Configuration > User Types** General tab, then the locations are gathered only from the installed app. If the field resource has logged in through Core Application on a browser, the location details are not gathered from that device.



A track is highlighted in these scenarios:

- When hovering over any activity marker on the map for at least half-a-second, or clicking the activity icon on the right panel:
  - The part of the track between the previous and selected activities is highlighted.
  - The selected and previous activity markers are highlighted.
  - The remaining activity markers and breadcrumbs are grayed out.
- When hovering over a point from the track for at least half-a-second:
  - The part of the track and the activity markers from the previous activity to the next one are highlighted.
  - The remaining activity markers and breadcrumbs are grayed out.

This screenshot shows a track between points B and C highlighted in red:

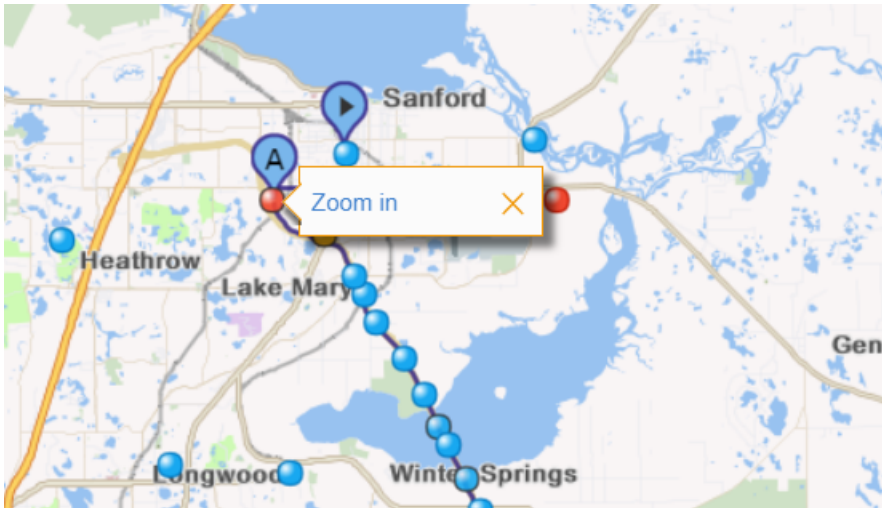


The track is highlighted according to these rules:

- The highlighting described in the earlier bullet points are applied only for non-clustered points.
- Both resolved and unresolved activities are considered when highlighting the route. If activity B is highlighted and there is an unresolved activity (for example, Lunch) before it, then the track is rendered from Lunch to B.
- Breadcrumbs between the selected part of the route are highlighted gradually, one after another. The order of highlighting is based on the timestamp, starting from the earliest one.

**Hint for a clustered point:** When you click a clustered breadcrumb (resource track point) the hint 'Zoom in' appears near it. It displays the timestamps of the points that the cluster contains. Upon clicking Zoom in, the map is zoomed in to the area with breadcrumbs. This screenshot shows a clustered breadcrumb with the hint:





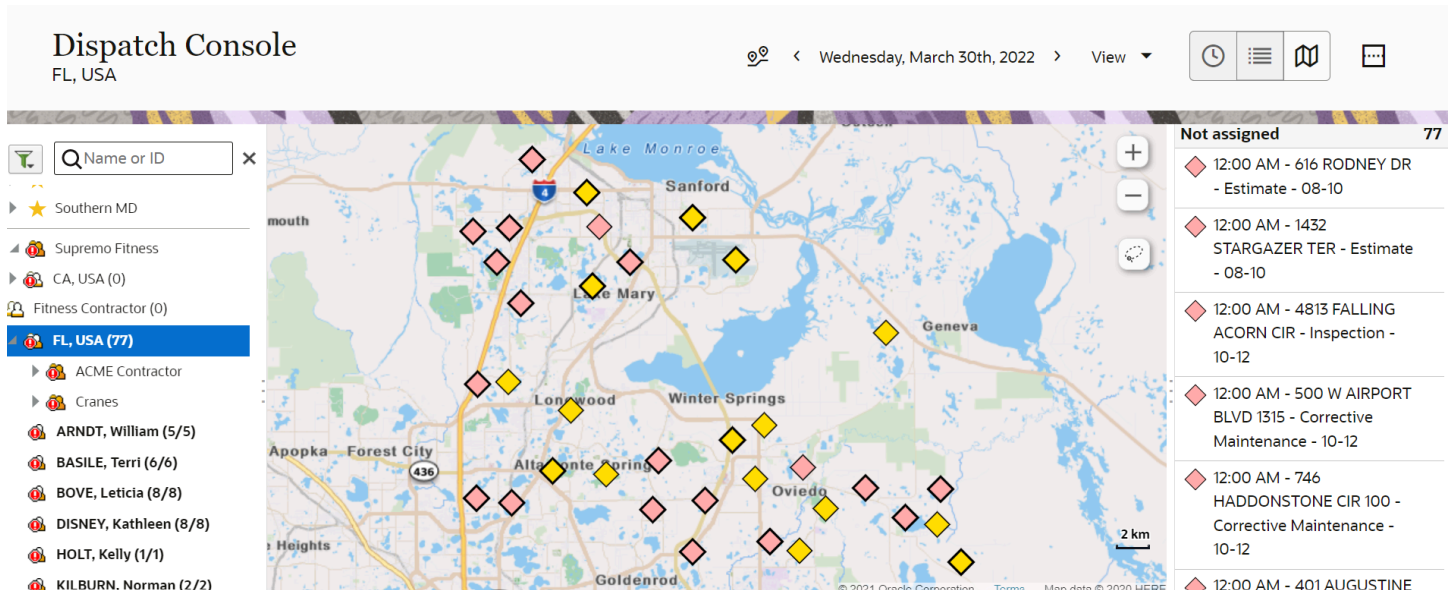
## View a Group or Bucket in Map View

You can see the location of all the resources, including child resources, for a particular *group* or *bucket* in the *map view*.

1. Select a group or bucket from the resource tree.
2. Click **Map View**.
3. Click **View**.
4. Select the **Apply Hierarchically** check box.

5. Click **Apply**.

The map view appears, shown in this screenshot:



The map displays and shows the location of 1000 scheduled and 1000 non-scheduled activities on all of the routes for the resources in the selected group or bucket.

### View a Resource in Map View

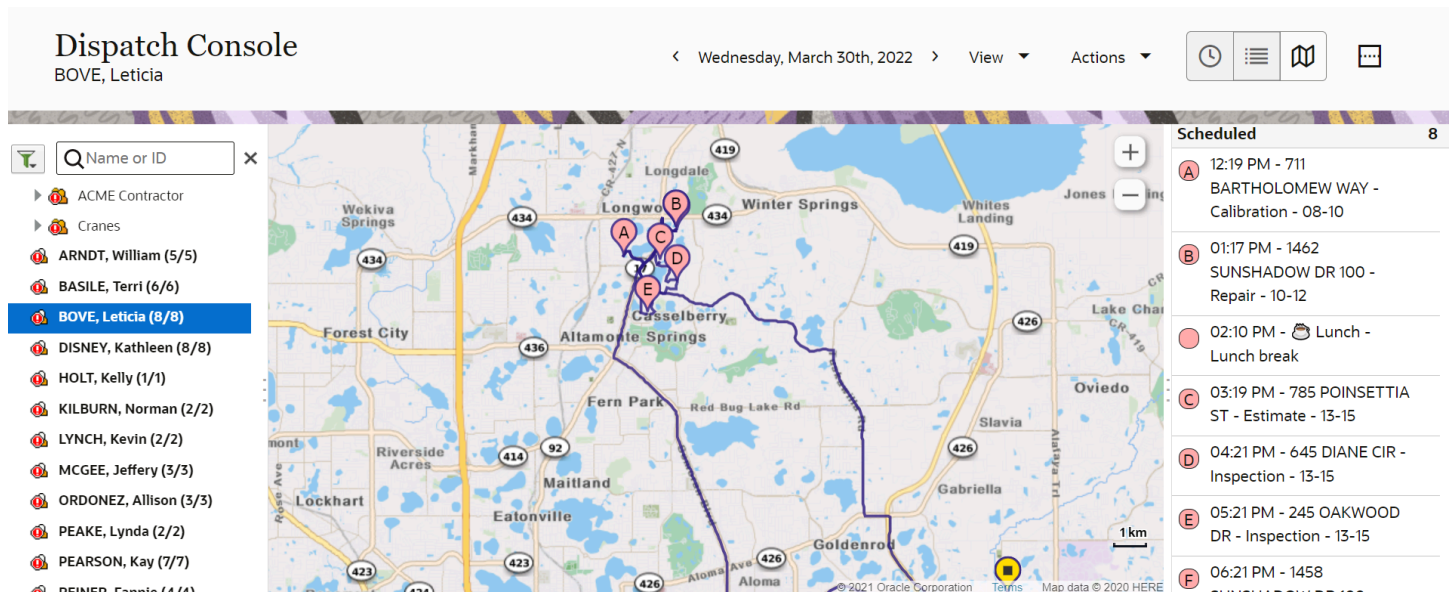
When viewing an individual resource in Map View, you can see the resource’s location as well as the location of nearby resources. You can also see a plotting of the suggested route, driving directions, and the actual route taken by the resource (Resource Trace).

**Note:** Driving directions for Oracle map and geocoding are only shown in English (default), French, German, Italian, and Spanish.

1. Select a resource from the *resource tree*.
2. Click **Map view**.

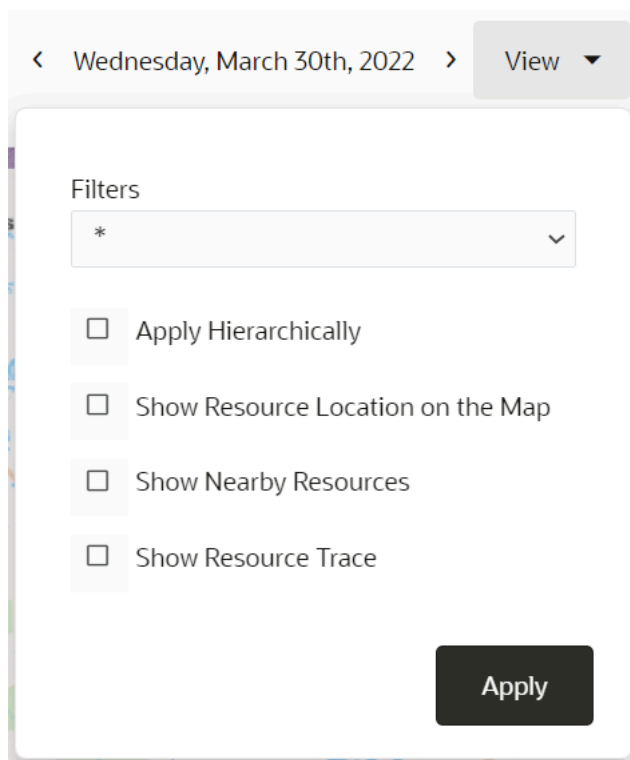
The page shows a map and a list. The map shows the resource’s route pertaining to scheduled activities and the list includes scheduled and non-scheduled activities for the day. If you have enabled the Google maps service at the

time of setting up the instance, you can see the satellite view layer icon. This screenshot shows the Map view for a resource and the activities assigned to the resource:



3. Click **View**.

The **View** menu opens:



4. Click the **Show resource trace** check box in the **View** menu.

The page resets and the route is indicated by dots. See the Oracle Field Service Smart Location Cloud Service user guide for more details.

## Find Nearby Resources in Map View

If you want to move an activity, you can view the nearby bucket resources to find someone who can take the job.

1. Select a resource from the resource tree.
2. Click **Map View**.

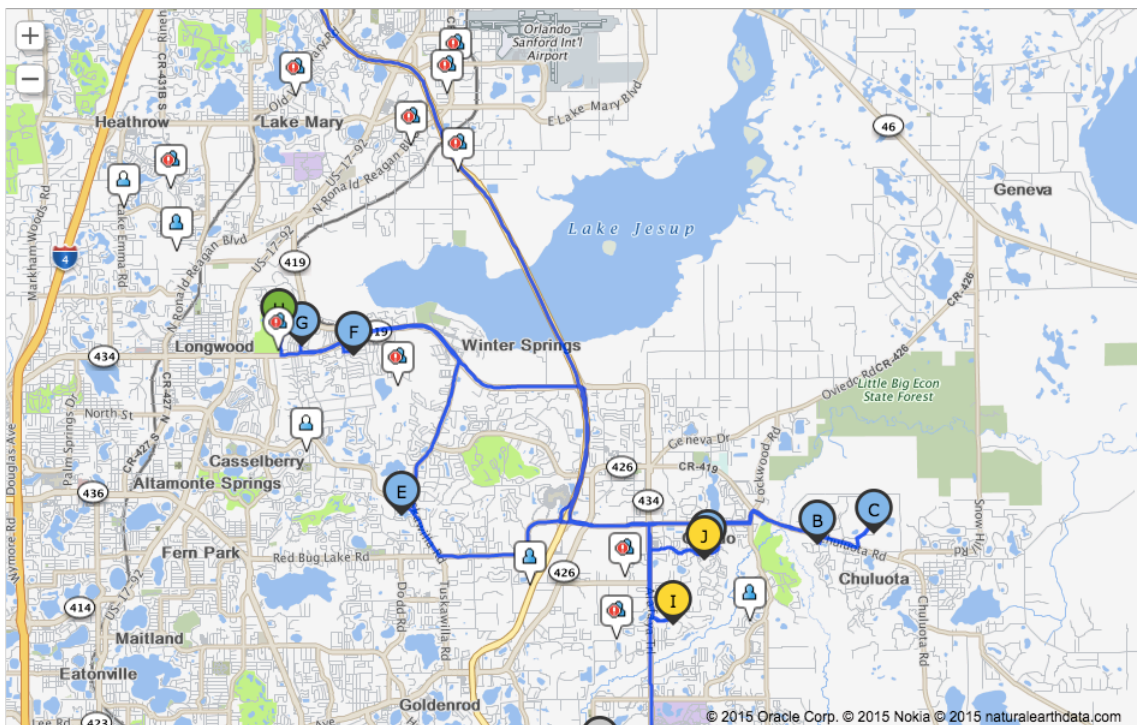
The map shows the resource's route for the day and a list of the scheduled and non-scheduled activities. If you have enabled the Google maps service at the time of setting up the instance, you can see the satellite view layer icon.

3. Click **View**.

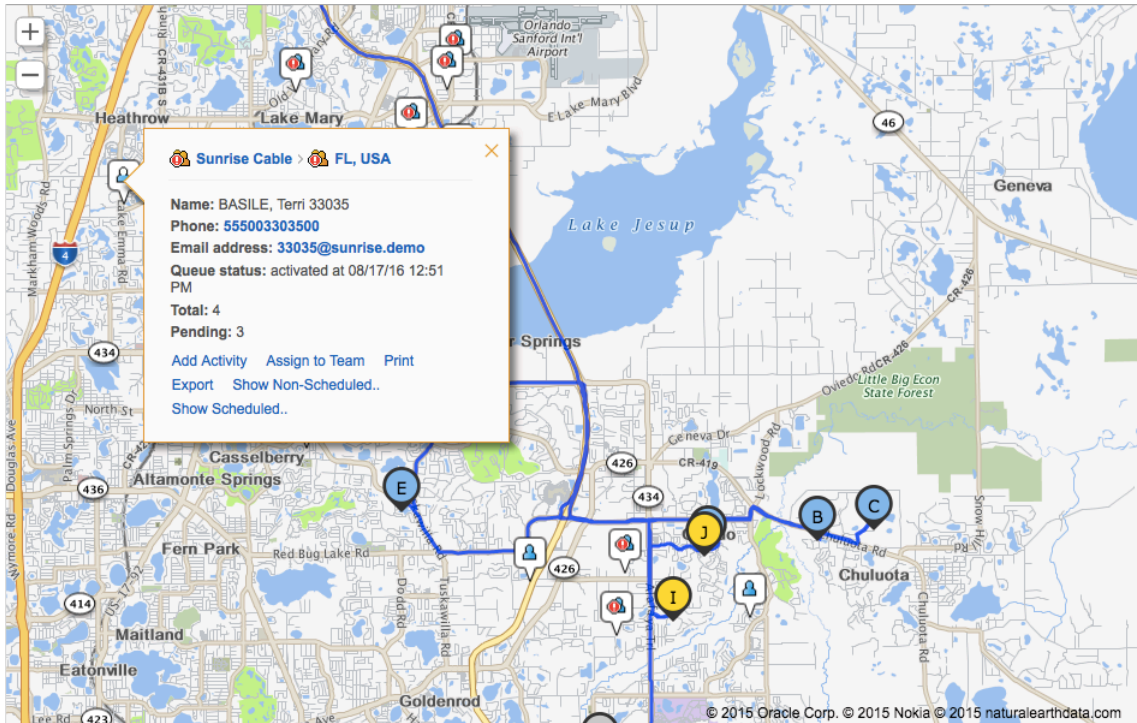
The view menu opens.

4. In the View menu, select the **Show Nearby Resources** check box.

The screenshot shows the other bucket resources in the area.



5. Click any icon to see the details of that bucket resource, including name and contact information.



## View the Traffic Layer in Map View

You can view the real-time traffic data on **Map View** to determine the best route to take to reach your destination.

1. Click **Map View**.
2. Click **View** and select **Show Traffic**.

The **Show Traffic** check box is displayed if you have selected the **Use real-time traffic data** check box on the **General** tab of the **User Type** page. If you select a past date or a future date on Layer Switcher, the **Traffic** layer caption becomes inactive. After selecting the **Traffic** option, if you navigate to another page from the **Map View** and navigate back to the **Map View**, the **Traffic** option will be deselected.

**Note:** Traffic information varies based on the map provider's data availability, which may not be available in all countries, areas, states, provinces, and localities. Check the map provider's website for data availability. When the traffic data is available, the application uses the most recent information available from the map provider, which may not always be the current information.

## Select Activities on Dispatch Console Map by Drawing a Polygon

You can select not-assigned and non-scheduled activities from the Dispatch Console map by drawing a polygon on the map. You can assign the activities thus selected by dragging and dropping them, or by using the Move option.

1. Select a bucket or a group in the resource tree.
2. Navigate to the Dispatch Console map and select 'Show non-scheduled'.



**3.** Click the lasso icon.

The application switches to drawing mode and the message, 'Outline area to select activities' is displayed on top of the map.

**4.** Draw an enclosed shape using the lasso.

The activities located inside the shape are displayed in the right panel on the map. All clustered activities are selected as well. Route activities (or scheduled activities) are not considered for selection. You can select up to 1,000 activities using the lasso. Activities in the right panel are ordered according to their priority set in the **Non-scheduled and Not assigned activities map markers** section on the **Business Rules** page. In addition, markers, if any, are shown for the activities in the right panel.

**5.** To select the activities for further action, click the required check boxes in the right panel.

The number and total duration of the selected activities is displayed on top of the panel. You can perform these functions with the selected activities:

- a. Drag and drop the activity to a resource on the resource tree.
- b. Click **Move** to move the activities.

**6.** To exit the drawing mode, close the message.

## Dispatch Map Zooming and Centering

Dispatch maps are zoomed and centered based on these rules:

- The zoom level of the Dispatch map remains the same, even if you change the routes. In other words, when you add or remove an activity from a resource, the map does not 'jump' to the new route. The map boundary and zoom level remain the same after these actions:
  - You move an activity to/from the Scheduled panel on map.
  - You assign an activity from the Dispatch map (by drag and drop or Move functionality).
  - You move an activity on another panel (list view, time view, map view).
  - You refresh the page, or it is refreshed automatically. The map is re-centered if you click a resource in the Resource Tree or the map icon in the Dispatch Console.
- When there is no data binding for these maps:
  - Team Map: When no activities, start and end resource locations, or home zones centers of resources from group are available
  - Resource Work Zone maps: When no Work Zones are configured for the selected resource
  - Work Zone configuration map: When no shapes are configured for the selected Work Zones
  - Quota map: When no Work Zones with shapes are configured for the selected bucket

Then the map is centered based on these entities:

- The activity location statistics of the area where the company operates.
- The company boundaries as defined on the Business Rules page.
- The whole world.

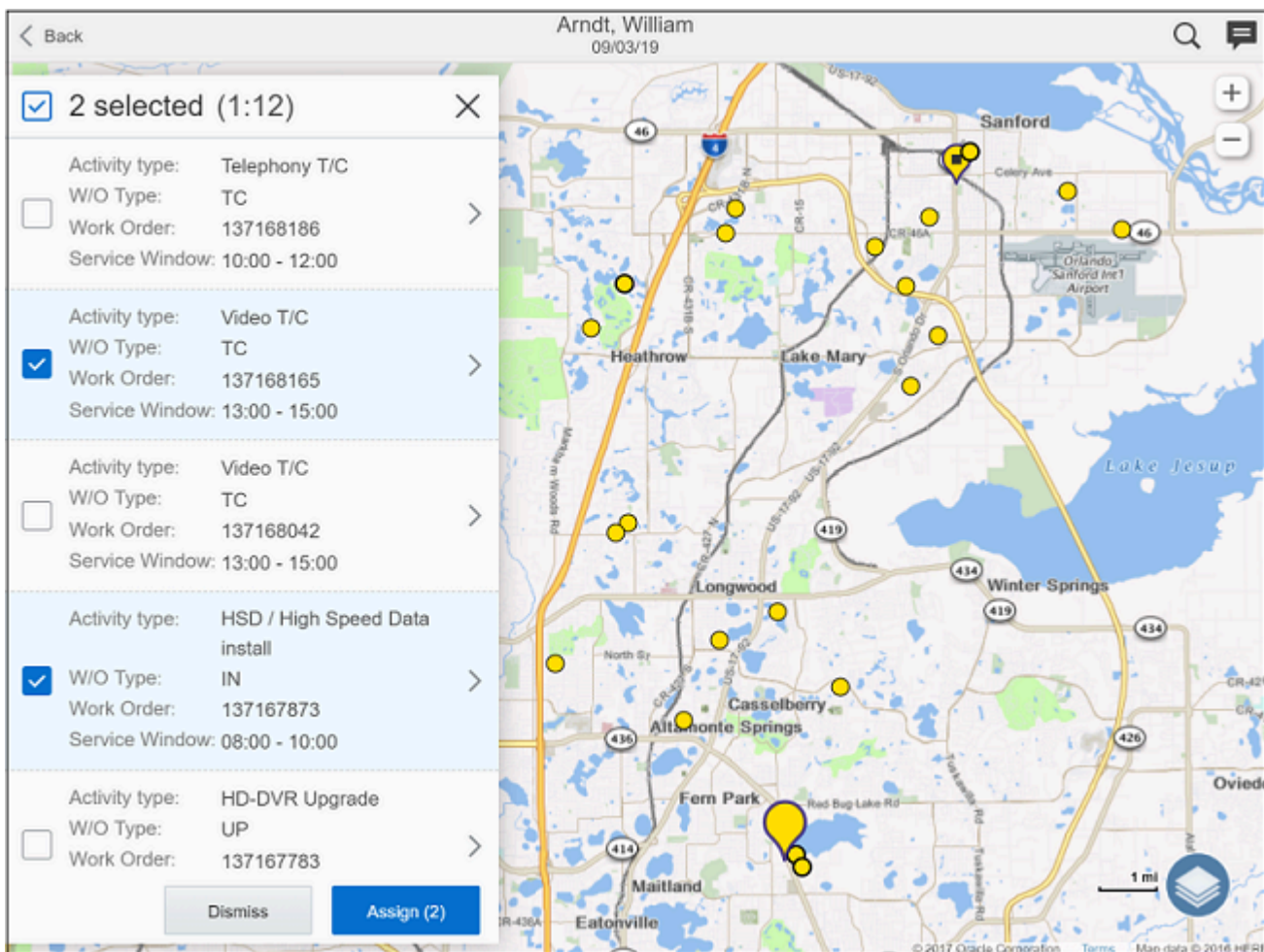
If the company boundaries are set to a country, then the whole country is displayed when no data binding exists. If several company boundaries are set, for example, the company operates in several countries across Europe, then the map includes all binding areas that are added.

- When you drag a Google map, a layer with activities and routes 'sticks' to its map tiles. There is no 'jelly' effect when activity markers lag behind the map while scrolling.
- When you enable the **Scheduling** layer, the non-scheduled activities are displayed on the Route map. You can view the **Activity details** page from the activity hint. After you navigate back from the **Activity details** page, the map is focused on the same area, with the hint opened for the selected activity.

## Select an Activity to Schedule from Route Map

You can pick and assign any activity from the list using the Scheduling Layer on **Route Map**. Activities within the same location or proximity are clustered into one marker with a thick border. You can select any activity when working with the clustered activities. When working with clustered activities, you can safely navigate to the **Activity Details** page and back to the **Route Map** page. During this time, the selected activities remain as is.

1. Navigate to the **Route Map** page.
2. Select the **Scheduling** option in Layer Switcher.
3. Select the clustered activity marker.
4. Look for the activities from the cluster on a separate panel on the map.



5. Select the activities that you want to assign to a schedule.
6. Click **Assign** and confirm the selected activities.  
The selected activities are added to your route.

## Draw Polygon to Select Activities

When you enable the Scheduling Layer, you'll see a new Lasso icon on the Route Map page.

This icon helps you switch to 'draw' mode, where you can select activities on the Scheduling Layer. You can select all the activities within a drawn enclosed shape and all the selected activities are displayed in the activity panel. You can add the selected activities to your route.

### How to select activities?

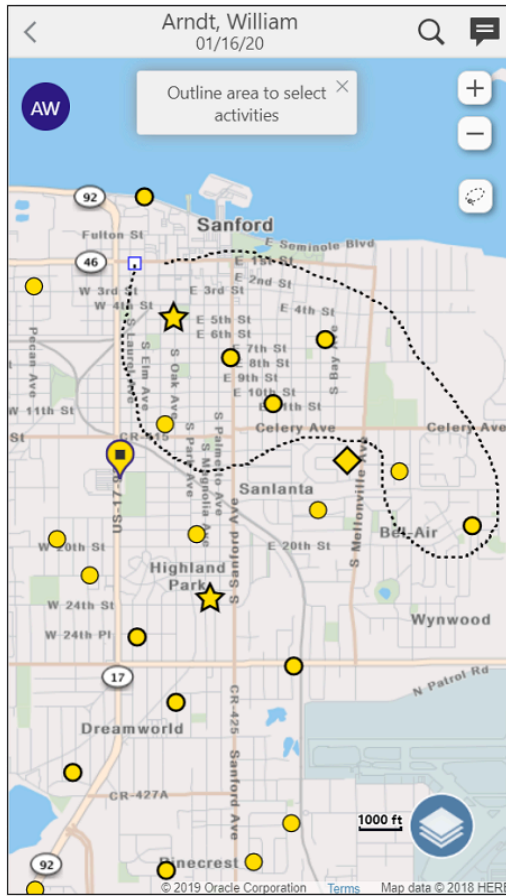
Follow the steps below to select activities:

1. Click the Lasso icon to switch to drawing mode.

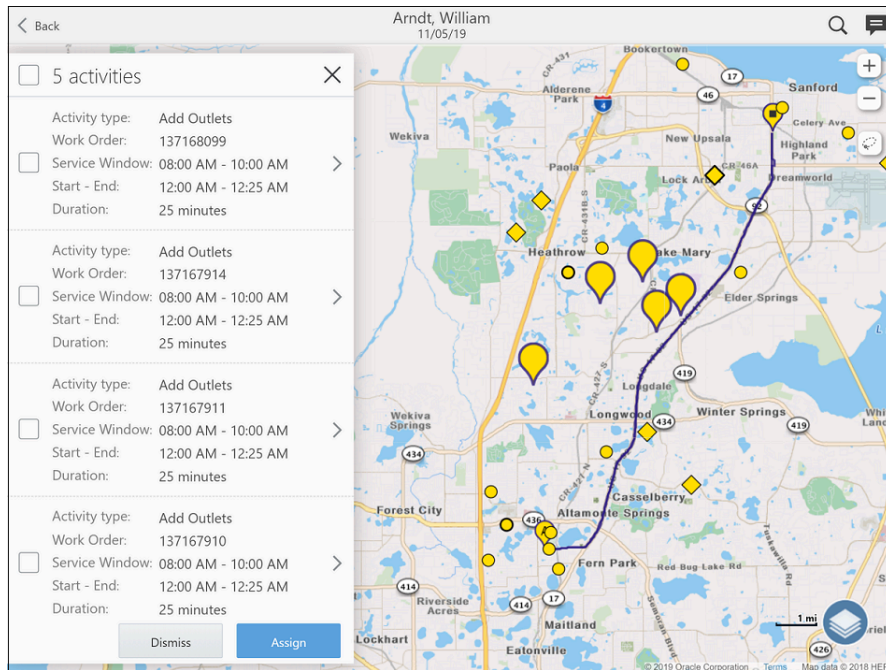
A message **Outline area to select activities** is displayed on top of the map.



2. Draw an enclosed shape in the Scheduling layer.



Select the listed activities and assign them to your route. Click **Assign**.



3. To cancel the drawing mode, you must close the message hint or zoom the map in or out.

**Note:** The drawing functionality is available in online mode only.

### Show Selected Activities on the Dispatch Map

When you select multiple activities on the Dispatch map (by drawing polygon or selecting clustered activity), the selected activities appear on the right panel on the map. When marking one or several activities in the panel, the top panel displays the number and total duration of the marked activities. To assign them to other resources:

- Drag the marked activities to a resource from the tree.
- Click **Click on the Move** action at the top of the panel and move the activities.

In the panel, the activities are listed according their priority (Urgent, Under risk, Other). The activities appear on the map with different markers - bubbles.

### Show identifiers on the route map

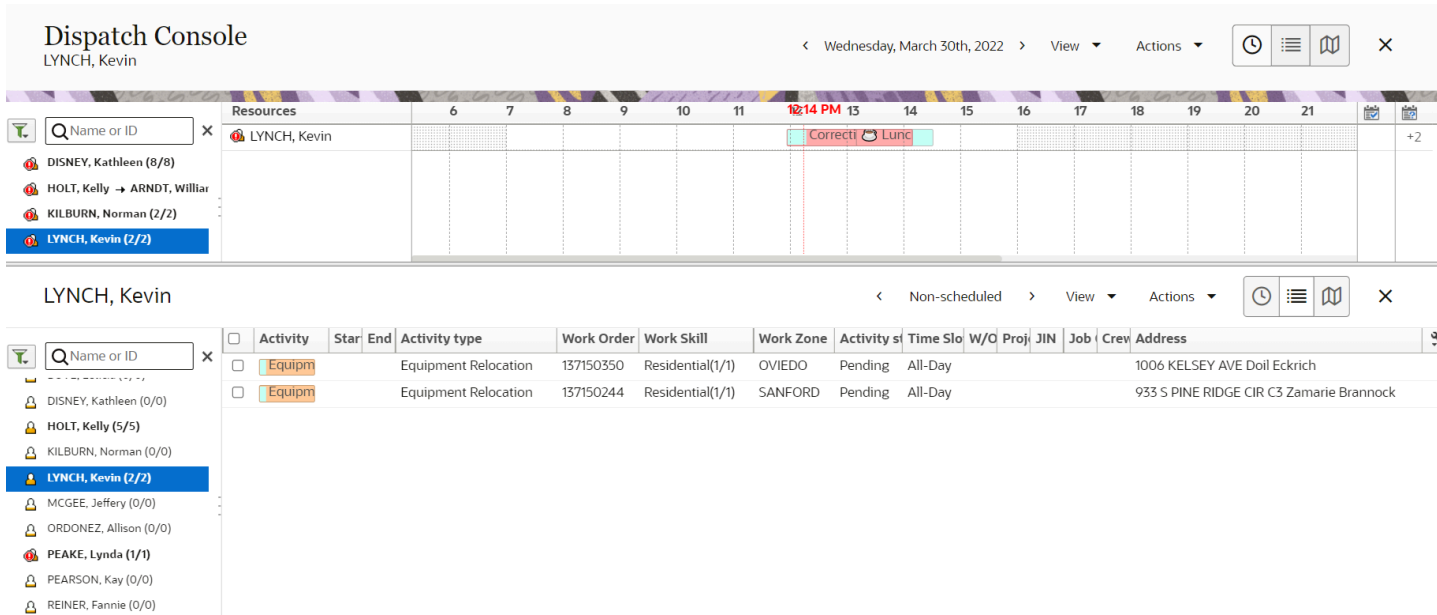
When you select multiple activities on the Route map (by drawing polygon or selecting clustered activity), the panel displays activity marker and activity identifier for the activities.

## View Resources and Activities in Two Panels

You can operate the upper and lower panels independently, within the *Time view*, as the panels have their own controls. Since you can access the resource tree independently from each panel, you can compare availability in two sections of the Tree at the same time.

1. Open the resource tree.

2. Click the resource that you want to view in the top panel.  
The resource's schedule displays in the work area.
3. Click the plus icon to open the bottom panel.  
The initial display in the bottom panel reflects the top panel.
4. Use the search fields and horizontal and vertical bars to manipulate the display in each panel to meet your needs.
5. Use the bottom panel to drill down while retaining the "bigger picture" in the upper panel. Or, operate the two panels independently by investigating the availability simultaneously in more than one section of the tree. This screenshot shows the two panels of Dispatch Console:



If you want to find an available resource for an unassigned activity, view the bucket in the top panel and the resource's scheduled activities in the bottom panel.

## Activity and Resource Hints

A hint is displayed when you hover over an activity or a resource and it provides contextual links to relevant pages. In an activity hint you can include links to activity-related pages such as Activity details and action pages such as Start activity and Suspend activity. Similarly, in a resource hint, you can include links to resource-related pages such as Add activity, Activate route, Assign to team, Resource calendar, Work Skills, Work Zones, and Location. Your administrator configures the links on activity and resource hints.

Activity and resource hints appear and behave the same way throughout the application. After your administrator configures the hints, regardless of the page on which the hints are displayed, the same configuration is applicable. The links that are configured to display on the hints display at the bottom of the hint on all the pages.

Activity hints in Dispatch Console show a small map view of the location, if available. The **Show Non-scheduled** and **Show Scheduled** links are shown only in hints within the Dispatch Console. They are not shown in hints on the other pages.

On small screens, activity hints opened from Search results are displayed in the full-screen view, similar to the way it is displayed when opened from the Dispatch Console.

Information on the resource hint is displayed in the time zone of the resource this hint belongs to. For information about the time zone for the activity hint, see the Time Zone Settings topic.

#### Related Topics

- [How do time zone settings work?](#)

## Create an Activity or a Service Request from a Custom Map Layer

In the utility organizations where map layers are commonly used, you can create an activity or a service request from a map layer and include the asset details and GPS location. You can also interact with the asset directly and obtain historical and/or IoT data about assets. The application can capture the correct location and asset properties automatically, if configured.

Example: A facility maintenance company wants its dispatchers and technicians to be able to create a maintenance activity from a map asset. The steps to perform in the application are:

1. Administrator configures the plug-in or the custom form. Let's say, your administrator has configured the 'Add maintenance activity' custom form.
2. Administrator configures the Shape hint button field for the plug-in or custom form, for the required custom map layer. For example, the Administrator has configured the Shape hint button field with the 'Add maintenance activity' custom form.
3. Dispatchers and technicians open the plug-in or custom form from the team map or the resource route map and create the activity or service request.

Steps to create an activity or a service request from a custom map layer:

1. Open the team map or the resource route map.
2. Click the layer icon and select the layer on which **Shape hint button** is configured. Based on the earlier example, select the layer for which the 'Add maintenance activity' custom form is configured.
3. Click the shape and then click the plug-in or custom form in the hint. Based on the earlier example, click 'Add maintenance activity'.

The configured plug-in or custom form opens. Based on the earlier example, the 'Add maintenance activity' custom form opens and lets you create the activity.

## Activity Details Page

You can use the **Activity details** page to view all the details of an activity. You can also perform actions such as move, cancel, view the history, reschedule, manage inventory, add resource preferences, and view the message scenarios.

This screenshot shows the **Activity details** page with the Resource name and Scheduled activity date in the header, Customer info, Service info, PAS, Equipment, Resource Preferences, and Message:

Dispatch Console

### Activity Details

ARNDT, William, 03/30/22

0:25 On My Way Start Safety Checklist Move Cancel Suspend Navigate Map Inventory ...

Customer Information	Service Information	Business Process
Account	Work Order 157168204	<input type="checkbox"/> Safety Checklist <input type="checkbox"/> Debrief
Name Veronica Pownell	Severity	<b>Project Details</b>
Address 6208 PLANTATION LAKES CIR	Activity type Repair	Project ID
City SANFORD	Contract Coverage	Job Quotation Number
State FL	Job Order	JIN
ZIP/Postal Code 327717333	Service Level	Crew Size
Account Number	Time Slot 08-10	
Phone	Duration hours 0 minutes 53	
Email	SLA Start m/d/y hh:mm AM/PM	
Sales Rep	SLA End m/d/y hh:mm AM/PM	
Sentiment	Traveling Time 25 minutes	
	Problem Summary	
	Current Temperature (F)	
	Installers needed	
	Calibrators needed	

Dismiss Submit

The tabs contain specific information about Preferences, Messages, and History. Your administrator can configure this to your company's requirements and may include additional custom tabs, such as **Customer** and/or **Service Info**, **Inventory**, **Required inventory** and others.

## Workflow Panel

The workflow panel helps you visualize the flow of steps for an activity and complete the steps. If your administrator has configured a workflow for the activity type or user type, then a workflow panel is displayed on the **Activity Details** page.

The color of the panel depends on the theme you have selected. Further, the steps in the workflow panel display horizontally or vertically, based on the screen width and orientation of your device.

## Inventory Tab

The **Inventory** tab displays the details of the equipment that is either installed at the service address or is required to complete the activity. You can use this page to change equipment on behalf of a resource working at the service location. Administrators can configure the details that you want to display on this tab, using the **Inventory Identifiers** Context Layout Structure.

You cannot update the inventory details for a completed activity.

The display of information on the Inventory tab depends on your device. If your device's screen is wider than 1024 pixels, the inventory details display as a table. You can drag the inventory table horizontally on a desktop device.

This screenshot shows the **Equipment list** page:

↑ Activity Details

### Equipment List

Add to Required Add to Customer

Technician 6

Part Item + Revision	Part Item Description	Quantity
ECM100BELTA	Running belt, 60x20, Multi-ply, Pre-lubricated	3
ECM200SENSORA	Belt Force Sensor/Tensioner	6
FAN001A	Acon 4in Treadmill Console Fan	6
FUSE002A	Treadmill Fuse 002	14
KEY001A	FIT3000 Treadmill Safety Key	10
KEY002A	FIT2100 Treadmill Safety Key	12

The **Required Inventory** section always displays first on the **Inventory** tab. There is no configuration required for it. The remaining inventory items display below the **Required Inventory** section. On tablets and mobile devices, if there is

more than one item, inventory items are grouped by inventory type. An inventory group is collapsed, if there are more inventory items than set on the **Mobile Inventory Count** setting on the **User Options** page.

The **Inventory** tab may include this information:

- **Serial Number:** A unique number that identifies a piece of equipment and (usually) its manufacturer. A house icon indicates the equipment is located on the customer’s premises; a truck icon indicates it is in the resource’s truck.
- **Pool:** A grouping of inventory by location and/or condition, such as installed/deinstalled. The term "pool" is fluid and may sometimes be used to indicate ownership, such as a resource pool.
- **Actions:** Links for the types of actions that may relate to this specific inventory. These links vary based on your company’s configuration.

## How can I add my preference for a specific resource?

If you've a resource that you prefer for an activity over other resources, you can use the **Resource Preferences** tab to add them. You can also use this tab to view any restrictions on resources that shouldn't be added to this activity.

Resources listed here are in one of three categories:

- **Required:** Only one of these resources can be assigned to the activity.
- **Preferred:** If no Required resources are listed, then Preferred resources have priority over everyone else.
- **Forbidden:** Resources that can't be assigned to the activity.

## How do I see the messages for an activity?

You can see these types of messages in the Messages tab:

- **Notification:** messages sent to the customer and/or resource.
- Messages sent to or received from an external application.

Messages are displayed per these rules:

- Obsolete messages and messages in final statuses are removed from the message queue.
- No 'day of event' or 'day of route' messages are generated for non-scheduled activities.
- Messages that use the **Set property** delivery channel (method) are shown in this view, only if they were generated less than one (1) hour ago. The only exception from this rule is for messages that have the Failed status. Such messages are important for troubleshooting, so they don't have the one (1) hour expiration time.

You can filter the types of messages that are visible by using the **Message Status**, **Message Type**, and **Recipient** drop-down lists.

Follow these steps to view all of the messages associated with an activity:

1. Select the word “any” from a drop-down list to view all the messages.
2. Click **Search**. The page resets, displaying all messages, as shown in this screenshot:

Time	Method	Launch Condition	Scenario (Step)	Status (Description)	Misc.	Address	Inventory Serial Number	Time delivered
03/20/19 07:00 AM	Email	Add	new_appt (new_appt(Email))	new		33035@sunrise.de mo		

**Time:** Indicates the day and time that the message was issued. If it is in the future, then the time listed indicates when the message will be sent to the customer.

**Method:** Indicates the method by which the message is sent. For example:

- Voice –telephone or voice call.
- SMS – SMS text message.

**Trigger:** Indicates the previous action that triggered the message.

**Scenario (Step):** Specifies the details on the message sent.

**Status (Description):** Indicates whether the message was successfully sent or not. If a message was successfully sent, this column displays **Delivered** or **Sent**. If not, the column displays **Failed** and a reason for failure.

**Address:** Indicates the phone number or e-mail address to which the message was sent. If this column says **External system**, it means the message was sent to an external billing system.

*equipment S/N:* Indicates the serial number of any equipment referenced.

**Time Delivered:** Indicates the time the message was delivered.

## What details can I see on the History tab?

You can use the History page to view all the events associated with this activity from the time it was received through completion. Additionally, the page also shows information related to the activity route, which includes the time before the activity was created and after activity was completed. Such details are necessary for dispatch audit and helps you analyze unclear cases, for example, why a technician could be late for an appointment.

The details that are displayed on the History page depends on the retention period that's configured on the **Business Rules** page. For example, if the retention period for activities is 90 days, you can see the actions performed up to 90 days and not earlier.

You can see a record of the changes and movement of the activity, time stamped with the user ID. The changes and movement are recorded automatically by the application. As a dispatcher, you can use this tab when researching issues or problems with an activity. The user name links to a dialog that shows the interface in which the action was performed and the details of the device with which the action was performed.

This screenshot shows the History page:



↑ Activity Details

## History

Action Time	Action	Changes	User
03/30/22 12:11 PM	route updated	Final Travel: 00:30	<a href="#">Admin (admin)</a>
03/30/22 12:11 PM	created	Activity type: Assisting Duration: 02:45 Traveling Time: 00:30 <a href="#">Show more</a>	<a href="#">Admin (admin)</a>

You can filter data using each column:

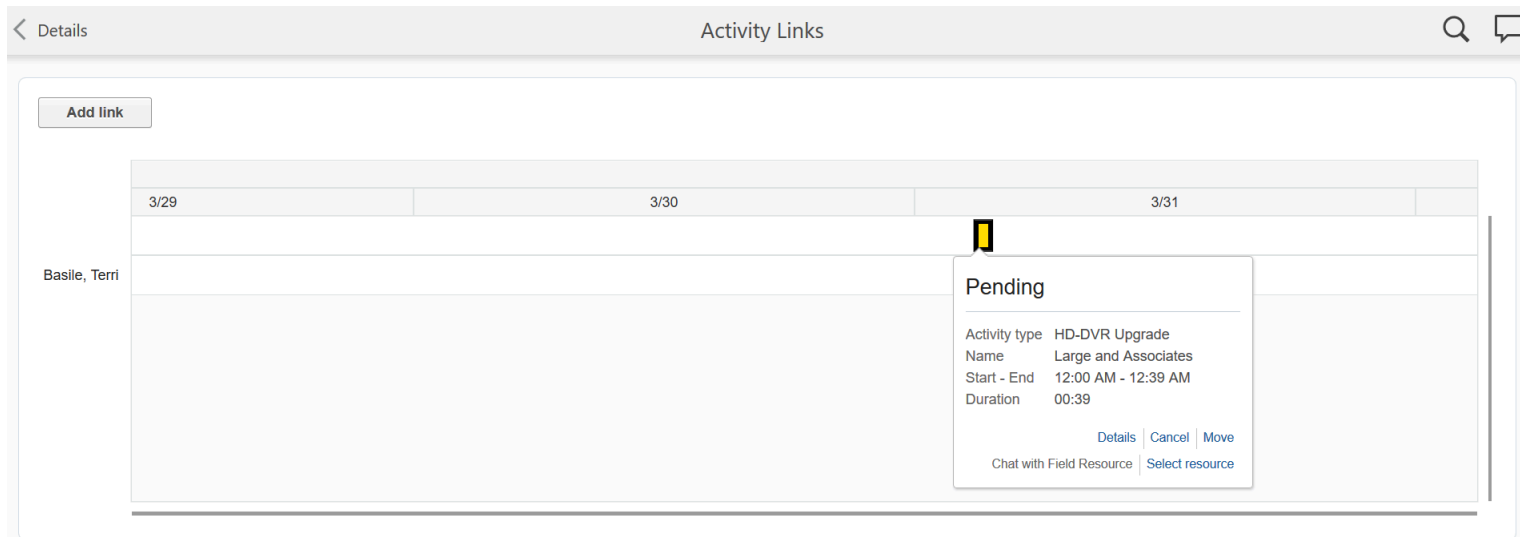
- In the **Action time** column, select one of the listed times. Select 'All' to include all the records that are generated within the retention period.
- Use the check boxes in the **Action** and **User** columns to filter records based on the existing actions in the table.
- Use the **Search** field to filter data in the **Changes** column. All rows with matching text are displayed.
- Click the user name in the **User** column to see the Interface and User Agent. Interface is the Oracle Field Service module from which you've updated the activity. User Agent provides the details of the browser from which you've accessed Oracle Field Service. This column is blank for the changes made by Oracle Field Service.

Smaller devices (less than 480 px) don't have these filters.

## Links Tab

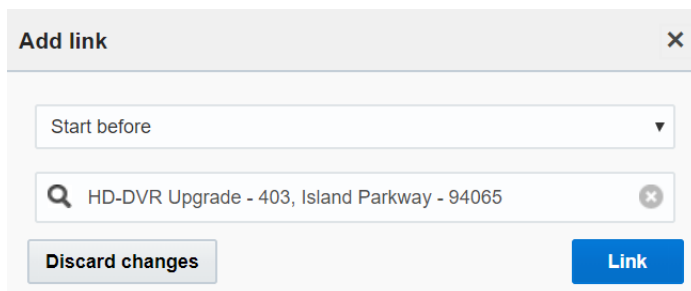
Some activities depend on the timing of others that may be performed by different resources in a different location. For example, before one resource can activate a telephone, another resource may have to flip a switch at a remote location. The **Links** page shows the links on a GANTT-like chart and the links appear chronologically.

This screenshot shows the **Links** page with the existing links:



Each activity that is linked is displayed as a box and the box shows the activity hint, when hovered on. You can use the activity hint to view the details of the linked activity. Activity colors on the chart are the same as in Dispatch Console - Time View. You can see only activities and not the travel time.

If you click **Add link**, you can link that activity to another in chronological order, as shown in this screenshot:



Search for the other activity by entering at least three characters. in the search field.

## Search Filters

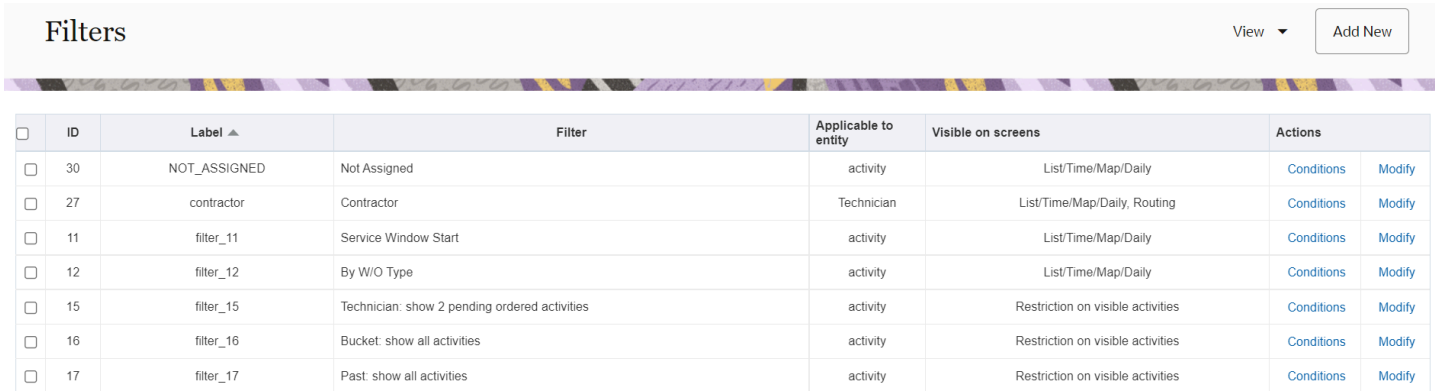
You can use the default search filters to narrow down search results. You can also create custom filters.

Let's say managers must be able to view a list of completed activities where the customer could potentially be a "detractor" of the business. You can create a filter to fetch such activities. The conditions for this filter would be that the customer entered a score of 2 or less on their *post-activity survey* for this question: "Based on this visit, how likely would you be to recommend our company to friends or family?"

## Add a Filter to the Filter List

You can add a filter to use customized words in search filters.

1. Click **Configuration, Filters**.
2. Click **Add new** in the upper right corner of the page, as shown in this screenshot:



<input type="checkbox"/>	ID	Label ▲	Filter	Applicable to entity	Visible on screens	Actions	
<input type="checkbox"/>	30	NOT_ASSIGNED	Not Assigned	activity	List/Time/Map/Daily	<a href="#">Conditions</a>	<a href="#">Modify</a>
<input type="checkbox"/>	27	contractor	Contractor	Technician	List/Time/Map/Daily, Routing	<a href="#">Conditions</a>	<a href="#">Modify</a>
<input type="checkbox"/>	11	filter_11	Service Window Start	activity	List/Time/Map/Daily	<a href="#">Conditions</a>	<a href="#">Modify</a>
<input type="checkbox"/>	12	filter_12	By W/O Type	activity	List/Time/Map/Daily	<a href="#">Conditions</a>	<a href="#">Modify</a>
<input type="checkbox"/>	15	filter_15	Technician: show 2 pending ordered activities	activity	Restriction on visible activities	<a href="#">Conditions</a>	<a href="#">Modify</a>
<input type="checkbox"/>	16	filter_16	Bucket: show all activities	activity	Restriction on visible activities	<a href="#">Conditions</a>	<a href="#">Modify</a>
<input type="checkbox"/>	17	filter_17	Past: show all activities	activity	Restriction on visible activities	<a href="#">Conditions</a>	<a href="#">Modify</a>

3. Fill in the fields in the **Add Filter** dialog box.

This screenshot shows the **Add filter** dialog box:

### Add filter ✕

**\*Label**

**\*Filter**

**\* English**

SpanishLA

Portuguese (Brazil)

French (European)

**Applicable to entity**

**List/Time/Map/Daily**

**Routing**

**Restriction on visible activities**

**User Types**  
The Filter for List/Time/Map/Daily will be applied for selected User Types.

Available		Selected
Privileged Adminis Technician Technician (2 penc	<input type="button" value="&gt;&gt;"/>	Administrator Dispatcher Manager
	<input type="button" value="&lt;&lt;"/>	

Field name	Action
<b>Filter</b>	Enter the name of the filter. This is the name that users see when they select the <b>Filters</b> drop-down list.
<b>Language</b>	Select the appropriate language from the drop-down list.
<b>Applicable to entity</b>	Select <b>Activity</b> or <b>Resource</b> .
<b>List/Time/Map/Daily</b>	Select this check box if you want the filter to appear in the <b>Filters</b> drop-down list in the <b>Actions</b> pane.
<b>Routing</b>	Select this check box if you want the filter to appear in the <b>Routing Filters</b> list associated with a route plan.
<b>Restriction</b>	Select this check box to prevent activities from appearing if routes have not been activated or the work day has not yet begun. You can also use this check box to hide some activities in buckets.
<b>User Type</b>	Select the user types that have access to this filter. For example, if this filter is used for routing, the user type for the person who performs routing must have the permission to access the filter.

4. Click **Add**.

The new filter appears in the **Filters** list.

**What to do next**

Add a filter condition for the newly created filter. A filter does not work if there is no condition specified.

*Related Topics*

- [Add a Filter Condition](#)

## Add a Filter Condition

Use conditions to define the activity you are searching for.

1. Click **Configuration, Filters**.

The **Filters** page is displayed.

2. Locate the filter for which you want to add a condition to.

3. Click **Conditions** in the **Actions** column.

4. Click **Add New** at the top of the page.

The **Add filter condition** dialog box appears.

5. Complete these fields:

Field name	Action
<b>Field</b>	Choose one or more activity or resource-based criteria on which to base the filter.
Dynamic	Select the check box, if you want the user to type a value for the field for which the condition is created.
<b>Conditions</b>	Select one or more options to represent how the selected field relates to the <b>Value</b> entry.
<b>Value</b>	Add the options that can be associated with the <b>Field</b> chosen for this condition. If you have selected an enumeration field, and multiple values are applicable for this condition to be met, then add them

Field name	Action
	<p>to the <b>Selected</b> column. From the list of available values, click to select and then click the &gt;&gt; button. The selected item moves to the <b>Selected</b> column. these rules apply to enumeration fields:</p> <ul style="list-style-type: none"> <li>○ Any field and property used in the application can serve as a filter condition.</li> <li>○ You must populate the value for the field and property other than enumerated fields manually.</li> <li>○ The condition value supports CSV format, such as 1, 2, 3, 4,, "1,1,1", "2,s", and ("test")</li> </ul>

6. Click **Add**.
7. Navigate to the **Work Area** and verify that the filter is listed in the **View** drop-down list.
8. Test the filter to ensure that it meets your requirements.

## Delete a Filter

When you don't need a filter anymore, you can remove it from the application.

1. Click **Configuration**. Click **Filters** from the **Displays** section.
2. Select the check boxes next to the filters that you want to delete.
3. Above the list of filters, click **Delete**.
4. Click **OK**.

## Date and Time Editors in Search Filters

You can see date and time editors on predefined date and time properties in the search filter on the **Dispatch Console** pages and the **Nearby Activities** page. When the administrator adds a 'date and time' or 'time' field to a search filter, you can see a date and time editor. Apart from this, you can also see a placeholder with the format in which you must enter the value.

The date and time or time editor is shown for these predefined properties:

- ETA (label: ETA)
- Service Window Start (label: service\_window\_start)
- Service Window End (label: service\_window\_end)
- Delivery Window Start (label: delivery\_window\_start)
- Delivery Window End (label: delivery\_window\_end)
- Communicated Window Start (label: ctime\_delivered\_start)
- Communicated Window End (label: ctime\_delivered\_end)
- SLA Window Start (label: sla\_window\_start)
- SLA Window End (label: sla\_window\_end)
- Time of Booking (label: atime\_of\_booking)
- Time of Assignment (label: atime\_of\_assignment)
- Route Activated (label: activated)
- Route Deactivated (label: deactivated)
- Route Reactivated (label: reactivated)

The "date time" or "time" editor is displayed only when one of these conditions is selected for the filter condition: <, >, <=, >= (less than, greater than, less than or equal to, greater than or equal to). For conditions such as contains or does not contain, in or not in, and starts with or does not start with, you can add either several values or part of the string

representing the date or time. Hence, the date time or time editor isn't displayed for such fields. If the date time or time editor isn't displayed because the condition isn't supported, use the ISO format:

- Date: yyyy-mm-dd
- Time (in 24-hour format): hh:mm

Remember that the format for date and time properties that you choose on your individual Preferences page applies to the search filters as well.

## Alerts

This section includes these topics:

- [Activity Alerts](#)
- [Resource Tree Alerts](#)

You can view the notifications such as activity and location notifications, help desk, and collaboration messages in the Collaboration window. All the Notifications are consolidated in one area under the chat icon in the header.

### Related Topics

- [Notifications in the Collaboration Window](#)

## Activity Alerts

You see alert messages when you move activities. These messages guide you through the process. This alert is also displayed when a resource who's part of a team is set to inactive or has a non-working day. In this scenario, the resource's work skills aren't shared with the team anymore, hence the alert.

These alerts are available:

**Overtime Alert:** This alert notifies you that the estimated completion time of the activity extends beyond the end of a resource's working day.

**Soft Skill Mismatch Alert:** This alert displays when you move an activity to a resource that doesn't have the preferable qualification level of an activity skill.

**Work skill Mismatch Alert:** This alert displays when you move an activity to a resource that doesn't have the required and preferred qualification level of an activity skill. Depending on your settings, the **Work Skill Mismatch Alert** either prevents you from moving the activity, or gives you the option to move it or to cancel the move.

**Do Not Move Alert:** This alert displays when you try to move an activity type that isn't allowed to be moved between resources. Activity types are configured in the **Add activity type** page.

**Simultaneous Activities Sharing the Same Visit Key alert:** This alert is shown when the activities that start simultaneously share the same visit key value. This is because, the activities in the same bundle must be started one by one, and the order can be enforced by bulk routing. To avoid seeing this alert, you can create an activity link with the "start simultaneously" link or set the same Communicated Window or Service Window for both the activities.





## Resource Tree Alerts

Resource tree alerts give you information about the status of a resource or route. Alerts appear next to the resource icon in the resource tree.



Alerts are displayed for all parent items in the resource tree up to the root resource (bucket or group). If the root resource has an exclamation mark, this means that at least one child resource has an alert. After the issue is resolved, all of the related alerts are removed.

Pointing to a resource's icon displays a **Hint** that provides a list of all warnings.

Icon	Meaning
	<p>There is a problem with the resource or the route. Possible reasons:</p> <ul style="list-style-type: none"> <li>• The resource has not activated the route on time.</li> <li>• A pending activity is very close to the end of the <i>serviceWindow</i> and the resource is likely to be late.</li> <li>• A pending activity has an <i>ETA</i> that occurs in the past.</li> <li>• The resource has stopped reporting.</li> </ul>
	<p>The resource is not configured and cannot be used properly. Possible reasons:</p> <ul style="list-style-type: none"> <li>• The Time zone is not set correctly for this resource.</li> <li>• The calendar is not configured properly for this resource.</li> </ul>
	<p>There is a problem with one or more of the resources located within this bucket. Possible reasons:</p> <ul style="list-style-type: none"> <li>• One or more resources have not activated their route on time.</li> <li>• One or more pending activities is close to the end of the service window and the resource is likely to be late.</li> <li>• One or more pending activities has an <i>ETA</i> that occurs in the past. Resource is not reporting.</li> <li>• The resource has stopped reporting.</li> </ul>
	<p>There is a problem with one or more of the resources located within this bucket. Possible reasons: The Resource has a non-working calendar, or is inactive with pending activities on the route.</p>

Pointing to a bucket/group's icon displays a **Hint** providing a list of all warnings.

Click on the icon next to the resource name to see a detailed list of all warnings, which are displayed in a **Hints** window.

These resource tree alerts are available:

- **Losing service window:** This alert can mean one of two things:
  - The activity is scheduled after the end of service window.
  - The activity has not been started within the predefined amount of time before the service window expires.
- **Stopped reporting:** This alert indicates that the activity did not start on time. It appears for pending ordered activities in activated queues that belong to the current working day.
- **Not activated on time:** This alert indicates that the resource did not activate his or her queue on time.
- **Mis-configured calendar:** This alert appears if a resource's calendar is configured incorrectly, for example when the resource is assigned two working calendars.
- **Smart Location Alert:** This alert indicates that the current location for a resource has not changed in a predefined amount of time.

## Dispatch Console Activities

Use the Dispatch Console to monitor the field and assign activities to technicians.

This table lists some of the tasks you can perform:

Dispatcher Activities	Dispatcher Activities continued...	Dispatcher Activities continued...
Add an activity	Print an activity	Add a Segmentable activity
Edit an activity	Export activity details	View and edit a Segmentable activity
Delete an activity	Add an activity to a shift	Start a Segmentable activity
Cancel an activity	Create an activity link type	Complete a Segmentable activity
Activate a route	Link an activity	Cancel a Segmentable activity
Start an activity	Change the activity status on behalf of a resource	Reopen a Segmentable activity
View activity details	Activate a Queue or Route	Move a Segmentable Activity Between Resources or Dates
View the directions for an activity	Start an activity	Move a Segmentable Activity Between Non-Scheduled Pool
Select a resource for an activity	Add time to an activity	Move a Segmentable Activity in a Bucket
Search for an activity	Complete an activity	Reorder Segmentable Activity Segments Within a Route
Move an activity	Suspend an activity	Adjust Activity Duration
Add a mass or repeating activity	Deactivate a route or queue	Adjust Segment Duration
Add a pre-work activity	Move a group of activities	Use the Assign to Team Function
Suspend an activity	Change activities in groups	Assign Teamwork Using the Drag-and-Drop Function
Reopen an activity	Cancel activities by group or team	

**Note:** The remaining portion of this section is specific to Core Application only.

Apart from the tasks listed in the table, you can also perform other activities from the Dispatch Console, such as create groups with the required resources from the main resource tree, rename groups, or delete the groups. You can see

all the created groups at the top of the resource tree and can have quick access to frequently-accessed resources. All groups marked with stars. These tasks can be performed only from the Dispatch Console of the Core Application.

## Add an Activity to a Route or a Bucket

Activities are usually added to routes through the routing process, however, you can add activities manually to a route or a bucket. Use this feature to set aside some time for a resource so that the application does not route any activities during that time.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a resource or a bucket from the resource tree.
3. Click the *actions button* and select **Add Activity** from the drop-down list.  
The **Add Activity** page displays.
4. Select the activity type from the **Activity Type** drop-down list.  
The fields on the page change based on the activity type that you select.
5. Complete the applicable fields.

Field name	Action
Activity Type	Select the <i>activity type</i> from the <b>Activity Type</b> drop-down list.
Name	Enter the customer's name. Used for customer-facing activities only.
Work Order	Enter the work order number associated with this activity.
Duration	Enter the amount of time that the activity lasts. Select the hours and minutes in the respective drop-down lists.
Position in Route	Choose an option to indicate whether this activity is to be performed in a particular order. <ul style="list-style-type: none"> <li>○ <b>Not Ordered</b> means that the activity is not ordered, and appears as <b>scheduled/not ordered</b> the lower portion of the time view interface.</li> <li>○ <b>Ordered</b> means that the activity is displayed on the resource's route. If you specify a time slot, the activity displays in that time slot. Otherwise, it displays as <b>pending</b> at the beginning of the route.</li> </ul>
Time Slot	Select the period of time within which this activity can be started.
All day	Select All day to indicate that the activity can be performed any time during the day. When you submit the changes on this page, the application clears the values entered in the <b>Time Slot Start</b> and <b>Time Slot End</b> fields. All day is available only for the activities that belong to activity types for which you have deselected the <b>Support of time slot</b> option.

6. Click **OK**.

## 'Position In Route' in an Activity Lifecycle

The Position in Route field is displayed on several pages and it is consistent throughout the activity lifecycle.

These points define the logic for the way the Position in Route field is displayed:

- The Position in Route field is applicable to all scheduled ordered activities (pending, started, completed, not done, and suspended), except for canceled activities. If in a route there are some completed activities, the started activities could have a higher value for Position in Route than the first activity.
- Not Scheduled Ordered, Not Scheduled Not Ordered, and Scheduled Not Ordered activities don't have a defined position in the route.
- Ordered or not ordered status cannot be defined manually for repeating, mass, and default activities for a shift. For such activities ordered or not ordered is calculated automatically based on the Service Window or Time Slot. If Service Window is filled up for an activity, it is shown and considered as ordered.
- Setting of order for Not Scheduled activities makes sense only to define the order of the activities, before they are scheduled.
- The behavior of the Position in Route field for activities that are on a bucket is same as the behavior of the Position in Route field for non-scheduled activities.
- The sequence of activities is consistent throughout all activity statuses.
- Activities in started, complete, and not done statuses display the Position in Route field as a number.

These points describe how the Position in Route field works:

- You can change the value for Position in Route depending on the constraints of these settings:
  - "Support of not-ordered activities" option on the Add Activity type page.
  - "Allow activity reorder inside the route" option on the User Types (Activity Management section) page.
  - "Allow selection of the next activity on Complete" option on the User Types (Activity Management section) page.
- You don't see the "Not Ordered" option, if "Support of not-ordered activities" is not selected on the Add Activity type page.
- You can change the order, if you have selected "Allow selection of the next activity on Complete" on the User Types (Activity Management section) page, but only by filling the "Next activity" field on the Complete page.
- You can change the value of Position in Route, if these conditions are satisfied:
  - The visibility of the field on User Types is read-write or mandatory.
  - "Allow activity reorder inside the route" is selected on the User Types page.
  - The activity status is Pending.
- You cannot change the value of Position in Route, if these conditions are true:
  - The visibility of the field on User Types is read-only.
  - "Allow activity reorder inside the route" is not selected on the User Types page.
  - Activity is in the final state (started, completed, not done, suspended, cancelled status).

This table describes the values of **Position in Route** on various pages. Be aware that the values depend on the Activity Type and the User Type settings.

Page	Activity Status/Position	Position in Route Field Values
Activity details	Non-scheduled	Ordered, Not Ordered
Add activity	Non-scheduled	Ordered, Not Ordered

Page	Activity Status/Position	Position in Route Field Values
Add activity	First scheduled activity	Not Ordered, Ordered position 1 (First)
Add activity	Next activity after a started activity	Not Ordered, Ordered position 2 (First)
Add activity	Last activity	Not Ordered, Ordered position 2 (First), Ordered position 3 (Last)
Activity details	Any Pending activity	Ordered, Position 3 (After Default Customer Activity Type - regular) This read-only field states the position of the activity and the name of the previous activity.

## Overview of Workflows

A workflow helps you visualize the flow of steps while performing an activity. It guides you through your work, and lets you see what steps are completed and what steps remain to be completed. While workflows help you perform all the steps without missing anything, it helps organizations onboard the mobile workforce quickly. Workflows also provide a new kind of audit for dispatchers and managers; they can easily identify how technicians are moving through their activities. Workflows are supported for all type of activities, for example, regular activities, mass and repeating activities, segmentable activities, and team work.

**Note:** You cannot change the workflow after a resource starts an activity.

Workflows help organizations enforce compliance in various ways. For example:

- Your corporate compliance requires the mandatory completion of a form. Forms dealing with COVID19 are a great example of this type of compliance.
- Safety compliance requires you to fill in a security or safety form before starting an activity.

### How does a Workflow Work?

Oracle Field Service calculates the activity workflows dynamically, based on the workflow conditions that are defined on the **Workflow Manager** page. A workflow is displayed on a panel on the **Activity Details** page. You must click the steps available in the workflow panel, enter applicable data, and submit the steps.

### Workflows for Segmentable Activities

All segments of a segmentable activity must be associated with a single workflow. It's not possible to associate different segments with different workflows. The segments inherit the workflow from the master activity.

### Workflow Step Counter

A counter of steps is displayed on the workflow panel.

This counter helps you see how many steps are there in the workflow and how many of them are completed. For example, if the counter shows 'Steps 2/7', it means that you can see a total of seven steps, and you have completed two of them.

The counter shows the total number of steps that are visible on the page, but it doesn't necessarily mean that those are the only steps that are configured for a workflow. The reason for that is that the availability of steps is driven by the data collected in the field, and the application cannot predict which of the steps is visible and which is displayed.

## Workflow Panel on Large and Small Screens

The application allocates limited space to show the workflow panel and in some cases, not all of the steps fit within the panel's height or width. When that happens, you can scroll inside the panel and access any steps that are located on either side of the page.

The workflow panel is displayed horizontally on large screens such as desktops, laptops, and tablets. In the landscape orientation, you can scroll the workflow panel from left to right. The panel can contain up to seven steps.

The workflow panel is displayed vertically in the portrait orientation. In portrait orientation, the workflow panel behaves the same way as all other sections on the page. On small screens devices, the panel is displayed vertically and shows up to five steps upfront. If the panel's height doesn't take up more than 50% of the screen height, then three steps are displayed. If there are more than three steps, you can scroll inside the panel to access the other steps.

## Workflows in Offline Mode

Workflows are supported in offline mode; there is no difference in their functionality whether the application is online or offline.

Be aware of these points:

- All the workflows for the day are loaded for offline usage.
- Visibility conditions, dynamic calculations, default and validation rules are supported.
- Plug-ins added as workflow steps must support offline work. The steps for plug-ins that do not support offline mode are disabled in offline mode.

## Complete the Workflow Steps

You can complete the workflow steps as you move through an activity—you can open the steps, collect data, and submit the steps. You have to complete the steps in the order enforced by the configuration of a workflow; the conditions of the steps influence when the steps become available or completed.

The workflow panel displays the steps that match the configured conditions:

- An *available* step shows with a *circle* icon. Tap this icon and the page where you must enter data is displayed.
- A *completed* step shows with a green tick inside the circle. Completed steps are shown as part of the workflows.
- Sometimes, some completed steps may not be available for modification. Such steps are displayed with a green tick and the step name is disabled. You can only see this step, but cannot click it.
- A step that is not completed and doesn't match the configured conditions does not appear on the workflow panel.

The workflow panel shows your custom themes, if any. The color depends on the color you have selected as the background for the header. For dark themes, the panel is displayed in the default color, and for light themes, the background of panel is white.

## Workflow for Activities in Final Statuses

The workflow remains displayed for activities in the final statuses, such as Completed and Not Done. There is no difference in the visualization of the workflow panel or the steps for activities in these statuses. Availability of steps here is determined by the way the step is configured.

### Positioning of Steps

The positioning of steps within the workflow panel is as follows:

- The first available not completed step is always visible.
- The completed step preceding the first available not completed step also is visible, if there is one.
- When all the steps are completed, the position points to the last step of the workflow.
- The application recognizes any connections to steps that aren't visible and demonstrates that there are more steps in the workflow, than what's displayed on the panel. When you navigate to the activity, the page automatically scrolls to the next available workflow step to make it easy to distinguish.

### Can other resources complete the steps for you?

Yes, in these ways:

- Dispatchers and managers can complete the steps through the user interface.
- API calls or message scenarios can complete the steps in the background. This works for steps where the **Show completed when** conditions are based on field and custom property values.

## Edit an Activity

You can see the overview of an activity in the Dispatch Console. To view or edit the details of the activity, you must go to the **Activity details** page.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Click the bucket or resource for which you want to view the activities.  
The list of activities is displayed for the selected bucket or resource.
3. Hover over the activity for which you want to view the details.  
The activity hint appears.
4. Click **Details** in the hint.  
The **Activity details** page appears.
5. Edit the required fields and click **Submit**.  
The activity details are updated.

## Cancel an Activity

You can cancel only Pending or En route activities.

1. Click the hamburger icon and then click **Dispatch Console**.
2. In the resource tree, select the resource for which you want to cancel the activity.
3. Click the activity that you want to cancel and click **Cancel** in the activity hint.
4. On the **Cancel Activity** page, complete all required fields and select a **Cancellation Reason** from the drop-down list.

The fields on this page vary based on the way the application is configured for your organization.

5. Click **OK**.

The activity is removed from the time view, but still appears in the list view with a small block of time.

## Update an Activity Location

Sometimes, when addresses are not resolved for activities, you may want to find out the reason. You may want to see an alternative address provided by Google, or modify the address components and check when the address is resolved. You may also want to set an updated address and coordinates for an activity and check its location on the map. You can use the **Update Activity Location** option for all these tasks. The **Update Activity Location** button is available on the **Activity Details** page if your administrator has configured it.

1. Open the activity for which you want to resolve the address.
2. On the **Activity Details** page, click **Update Activity Location**.

The **Update Activity Location** dialog box appears and displays these fields:

Field Name	Description
Address, City, ZIP/Postal Code, State	The address components of the activity, populated from the <b>Activity Details</b> page.
Country	The list of country values configured in the 'Available countries' section on the <b>Configuration &gt; Business Rules</b> page. This field is not displayed when <b>Available countries</b> contains only one item. If you have not specified the country for the activity, then the <b>Default country for geocoding</b> that is set on the <b>Business Rules</b> page is selected by default.
Map	If the address is not resolved, the message, 'Address not resolved' is displayed. When you resolve the address, the activity location is displayed.
Alternative Locations	This section is displayed if you have configured Google Maps as your map provider. The section shows the suggestions provided by Google's geocoding service, based on the Address, City, Postal Code, State, and Country field values. When possible, parts of the alternative address that differ from the original Address, City, Postal Code, State, and Country field values are highlighted in bold. You can copy any part of the alternative address from this section and paste it into the editable fields. The address section is updated when you open the page and also when you click Resolve. If there is no alternative address provided by the geoprovider, then this section is not displayed.

3. Click **Resolve**.

The modified address is resolved and the activity location is displayed on the map. This button becomes available only when you update one of the address fields.

4. Click **Apply**.

The address that is shown and the coordinates that are obtained after you click **Resolve** are updated on the **Activity Details** page.


## Search for an Activity

You search for an activity to add some details, know its status, know the actual time taken to complete it, and so on. You can also use the Search option to search for inventories and parts.

1. On a large screen device, start typing in the **Search** field in the header. On a tablet, smartphone, or any small screen device, click the magnifying glass to open the **Search** field.




2. Enter at least three characters of the word or the numerical value that you want to search:


Q kings 

# Search

▼ Name 1 of 1

-  12:00 AM - 322 Shadow Oak Dr - Calibration  
Non-scheduled

▼ Address 1 of 1

-  12:00 AM - 836 KINGSBRIDGE DR - Estimate - All-Day  
Non-scheduled

Estim

The results display below the search field. You don't need to press Enter to perform a search. The search term is displayed in the field until you select a search result. The term is cleared when you select a search result.

3. Click the result to view the **Activity Details**.

**Note:** For all the activity search results, the date associated with an activity is displayed only if the activity is scheduled for any other day than the current day.

## Navigation in Search

When you search for an item from Activity, Inventory, or Parts Catalog, the relative results appear on the page.

If you open search from the Landing page, search for activity details and click **Back**, you're navigated back to the Landing page. Similarly, if you open search from the Manage page and search for activity details or inventory details and click **Back**, you're navigated back to the Manage page.

**Note:** You can't start an inventory search from the Manage page and Dispatch Console. Inventory search works only when you open a resource's route. Then, search looks for the inventory related to this resource, to the activities in the currently selected route (of date), and to the resources in teamwork for that date. If you open Activity Details from the Dispatch Console, the route data isn't available. It is designed mostly for field resources.

## Narrow Activity Search Results

You can use **Search Preferences** to narrow and order the search results. The application searches for activities based on the preferences you select here. **Search Preferences** are pre-configured by your administrator.

1. Click the gear icon to view the search preference.
2. Select the check boxes next to the options that you want to search by from the **Search Preferences** menu, as shown in this screenshot:

## < Search Preferences

- Account Number ...
- Name ...
- Work Order ...
- Email ...
- Phone ...
- Cellular Phone ...

The **Search Preferences** section also contains Inventory search fields along with other search fields configured on **Business Rules**.

3. Drag and drop the categories in the list to change the priority of the preferences in the search results.
4. Select the date range for the search results from the **Date** drop-down list.

The value you select for this field is saved and retained even after you log out and log in again. If you don't select anything, the default value, **Starting from today** is applied until such time you change it to something else.

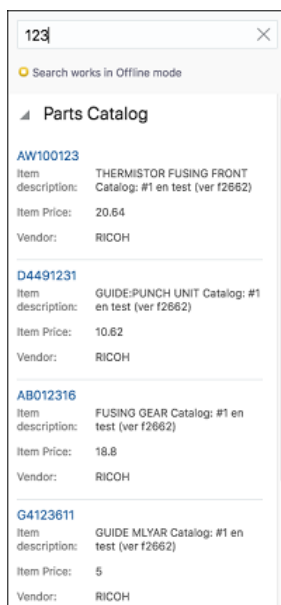
**Note:** Searching through a long time in the past, especially without restrictions may have an impact on the performance of search.

5. Click **Back to search** and enter the search value.

## Search in Offline Mode

You can search for Parts and Inventory in offline mode.

But, you cannot search for activities in offline mode.



## Search for Activities using Ad hoc Filter

You can use the Ad hoc Filter option in the **View** menu to search for activities based on the properties of your choice. You can access this option only from the Dispatch Console. Further, this option isn't configured anywhere and can't be shared with other users.

1. Open the Dispatch Console and click **View**.
2. In the **Filters** drop-down list, select Ad hoc Filter.
3. Click **Add Field to Filter**.
4. In the **Select field** drop-down list, select the field that you want to add as the search criterion.  
Only the fields that are configured for the **List view** are displayed in the **Select field** drop-down list.

5. Select a value for the field.

If you don't provide the value for a field, the field isn't considered as a criterion. To add several values for a string field, separate the values by commas. To add several values for an enumeration field, select the relevant check boxes.

6. Repeat steps 3, 4, and 5 and select all the fields you want to include in the search criteria.

You can select a maximum of 10 fields.

7. Click the Remove field icon to remove a field from the search criteria.

8. Click **Apply**.

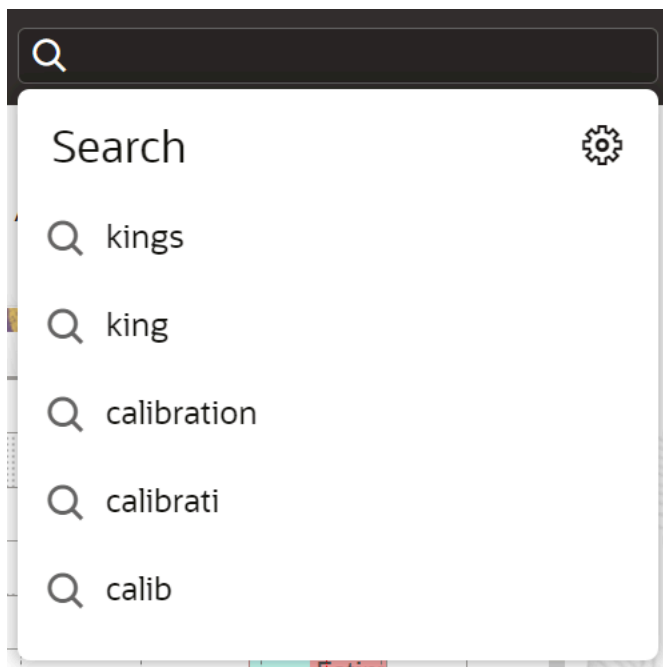
The activities that satisfy the filter criteria are displayed. Here, the application uses the 'AND' condition. If you've provided several values for a string field, the result includes the activities that contain at least one value. Here, the application uses the "OR" condition.

All the fields that you add to the ad hoc filter are preserved between sessions. When you open the Dispatch Console after logging out, the initial filter is "\*". When you select **Ad hoc Filter**, all the fields you had configured before are displayed.

## Recent Searches

You can view the last five search keywords in the Search box.

Here is the screenshot that shows the recent search keywords:



You cannot view the last five recent searches if you start a new session.

## Overview of En Route Status

Resources can indicate when they are 'En Route' to an activity. Indicating en route makes the Where is My Technician feature transparent and helps Routing prevent rescheduling 'En route' activities. Resources can perform the activities

that don't require travel (non-travel activities) according to the order in the route. However, after a resource sets 'En route' for an activity, they cannot perform a non-travel activity.

When a resource sets 'En route' for an activity, the application calculates the estimated time of arrival (ETA) according to the resource's location (with real-time traffic) if it's available. The travel visualization can be seen on the Time view from the time the status is set to En route, till the status is set to Started. This travel time is not taken into consideration in travel estimation and statistics.

Real-time traffic is available only if you have a valid license for Oracle Field Service Enterprise Edition with Google Maps. End customers are notified about that and the 'Where is My Resource Technician' page shows the actual 'On the way' status.

If there is an alert for the activity, the color of the alert takes precedence over en route in the Dispatch Console. For example, if a technician sets an activity as 'En route' and the activity is likely to lose the SLA, Dispatch Console shows the color configured for the SLA alert.

When a user other than the activity owner sets an activity to En Route, then the assigned resource's position is obtained through the Location service. If the assigned resource's position is available and the position has been gathered within the past five minutes, then:

- The map displays the route from the resource's position to the activity, if the activity coordinates are available.
- Travel time is updated using Real Time Traffic, if the required conditions are met.

If the assigned resource's position is not available, or the position has been gathered more than five minutes back then, the application displays the message 'Cannot identify resource location' on the map.

You can configure a filter on the Routing configuration page to exclude 'En route' activities from optimization.

**Note:** When your organization has enabled the **En route Support** feature, you cannot use the bundling activities feature. It is NOT a best practice to use the en route status when a resource doesn't go to a customer site.

Prerequisites to set the En route status for an activity:

- You have a valid license for Oracle Field Service Enterprise Edition with Google Maps
- **En Route Support** is selected on the **Business Rules** page.
- **Calculate travel** is selected for the Activity type.
- Activity is assigned to a Field resource.
- Field resource has an activated route.
- There is no Started activity in the route.

Resources can set an ordered, a not-ordered, or a non-scheduled activity in the route as 'En route'. However, to set the 'En route' status for an activity that is not the first activity in the route, the resource must have the permissions similar to the 'Start' activity. They must have the 'Allow activity reorder inside the route' and the 'Allow activity move from non-scheduled pool to scheduled one' permissions.

When you enable the 'En route Support' feature:

- Resources can confirm that they are 'En route' to an appointment.
- End customer is notified that the resource is on their way. The arrival time is updated.
- End customer can see the actual 'On the way' status and the updated ETA on the 'Where is My Resource Technician' page.

- Resources can stop their travel if they don't need to go to the customer (for example, the appointment is rescheduled).
- While En route, a resource can change the direction and go to another urgent appointment.
- Resources can take a break after the previous appointment and then set 'En route' when they are ready.
- If the problem is resolved and the appointment is not required any more, Dispatchers can cancel an appointment when the resource is on their way.

The 'En route' status launches the 'Call ahead' trigger, with which you can notify your customers. If you enable the "Enroute Support" feature, Oracle Field Service never considers a resource as on the way to an activity until the "En route" status is set for it. Further, if the 'En route' status is not set, then:

- Travel time is not recalculated.
- "Call ahead" message is not set.
- Where is My Technician page doesn't show the "On the way" status and the resource's position and track.

You can configure these options for the 'En route Support' feature:

- Configure a color for the 'En route' status on the Add activity type dialog box.
- Add the 'En route' and 'Stop travel' buttons to the Activity details page and the activity hint. For non-scheduled activities, the 'En route' and 'Stop travel' buttons are not displayed in the activity hint.
- Use the New API events 'activityTravelStarted' and 'activityTravelStopped' for notifications. For more information about these APIs, see the REST API for Oracle Field Service Cloud Service guide.

### Filter 'En route' Activities

You can filter activities with the 'En route' status. To do so, your administrator must create a filter on the **Configuration > Filters** page.

### Troubleshoot 'En route' and 'Stop Travel' Operations

You can use the activity History to see when a resource changed the status to 'En route' or returned it to 'Pending'.

### Prevent En Route Activities from Being Rescheduled

Routing takes into account the En route status, because you set the option at the Business Rules level. Both bulk and immediate routing do not change the activities in the En route status by any way. So un-scheduling, rescheduling, moving to a different provider, changing the ETA, or inserting another activity before one in the En route status never happens through bulk routing and immediate routing for activities that match the filter conditions.

Immediate routing for Urgent activities may insert an Urgent activity just before the activity in En route status, but it does not reschedule it. In this case, the status of the En route activity is automatically changed to pending and is retained on the same route.

## Auto-Adjustment of ETA for En Route Activities

You can get the most up-to-date information and ongoing updates about the Estimated Time of Arrival (ETA) for en route activities even when the traffic situation changes. Oracle Field Service auto-adjusts the ETA for en route activities when a technician is set to travel and until the travel finishes. The adjustment is based on the changing traffic situations, a technician taking a different route, or a technician running late or ahead of schedule.



The ETA is auto-adjusted for activities when these conditions are met:

- You have a license for Oracle Field Service Enterprise with Google Maps.
- Your administrator has selected the **Periodic update of ETA for En Route activities** setting on the **Business Rules** page.

You can see the adjustments in updated ETA values across the application and also on the activity **History** page. An activity starts getting auto-adjustments when:

- Activity is set to En Route status.
- Activity coordinates are resolved with high accuracy or you provided them.
- You do not set the activity travel manually (travel estimation method is not 'Manual adjustment').
- Continuous position data is available for a resource assigned to an activity with a coordinates accuracy of 100 meters or less.

An activity stops getting auto-adjustments when:

- Travel to an activity is finished (activity status is set to any status other than En Route).
- You set the activity travel manually (travel estimation method is 'Manual adjustment').

ETA is updated for an activity when the latest position data is available for a resource (with accuracy 100 meters or less), and it indicates that a field resource deviated from a calculated route for more than approximately 500 meters or for more than approximately 5 minutes (late or ahead of schedule).

After this, the application tries to recalculate the new route (subject to geoprovider data availability) considering the new resource position data. When a new route and new ETA are available, the ETA is updated.

## View the Forms Submitted for Bundled Activities

When you add a form to an activity bundling rule, all the activities that are bundled for the selected criteria show the form. When a resource that's assigned to one of the activities submits the form, you can see it using the **Forms Submitted** button.

Click **Forms Submitted > For Related Activities** on the **Activity Details** page to see the list of forms submitted by other resources while working on other activities or activity segments from the bundle. This list contains only the forms submitted as part of the 'associated forms' section that were configured for this bundling rule.

## View, Download, and Clear Images

You can download the images taken by technicians or view the images in their full-size dimensions. Field workers can view the photos and download them on their mobile devices, if needed. The Download and Clear options are available automatically when you add an image element to a Visual Form Editor. The Download and Clear options are also available for the File attachment and Signature elements.

1. Log in to Core Application or the installed application.
2. Open the **Activity details**, **Inventory details**, or the **Form history** page.
3. To view the image in full-size, click it.

The image is displayed in its real size, overlapping the page. Here, real size means:

- For custom properties: The dimensions specified in the property configuration.
- For form elements: The default dimensions.
- Compression applied by the application.

4. To download the image, click the download icon below the image.

The image is downloaded to your device.

5. To remove the image from the activity or the Form, click the clear icon.

The image is deleted from the application. The clear icon is available for the fields that have Read-Write or Mandatory visibility.

## Overview of Access Hours

Access Hours define the intervals in which an asset such as a building or an equipment is accessible for resources. Access Schedule is the exact time interval and the days on which the resources can access the asset.

The Access Schedule time zone is the same as the resource to which the activity is assigned. If the activity is assigned to a bucket, the time zone is the same as that of the creator of the activity until it is assigned to a resource. After the activity is assigned to a resource, the Access Hours field is calculated in the time zone of the resource.

Access Hours consist of set of access schedule intervals (up to two intervals per week day), and a set of exception dates. The exception dates are treated as non-working. For Example: You can set this Access Schedule:

- Mon-Fri: 8AM-12PM, 13PM-17PM
- Sat: 10AM-12PM
- Exceptions: 2018-01-01, 2018-05-01

This means that the resources can access the asset from 8 AM till 12 PM and from 13 PM till 17 PM, Monday to Friday and from 10 AM till 12 PM on Saturday. It is closed on Sundays. The non-working days are January 1st and May 1st next year.

The Access Hours and Access Schedule fields affect routing. When activities are created, routed, and moved, the Access Hours and Access Schedule are taken into consideration. If the access hours and access schedule are not within the activity schedule, the application displays an alert. If the activity is within the Access Schedule, it is assigned to a free slot in the provider queue adjusting the Access Schedule if possible. Otherwise an alert that the asset may not be accessible beyond the defined access hours is shown.

Access Hours are recalculated when there is a change in the access schedule or the schedule of the activity. Access Hours are always shown in the provider time zone with respect to overnight settings. For example, if a company has overnight work set to 5 hours and no access schedule is defined (that is, 24x7 access), Access Hours is calculated as 05AM-12PM, 12PM-05AM. If tomorrow is the exception date, only the today's segment is shown (that is, 05AM-12PM). If the exception date is today, only the tomorrow's segment is shown (that is, 12PM-05AM).

**Note:** Access Hours are not supported for segmentable activities. They are neither followed for the first segment nor inherited for any segmentable activity segment.

## Interpreting Access Hours

These rules are used to interpret a schedule:

- Empty schedule (or no schedule at all) and empty exception dates (or no exception dates at all) means no restriction, or 24x7 availability.
- Empty schedule (or no schedule at all) and some exception dates filled means 24x7 availability except exception dates, and not available on exception dates.
- Schedule includes all seven days (and may be some exception dates filled) means the availability is defined by the schedule for the given week day, and the asset is not available on exception dates, if any.
- Schedule includes some, but not all seven days (and may be some exception dates filled) means the availability is defined by the schedule for the given week day, if it is defined. The asset is not available on the week days for which no schedule is defined; also, the asset is not available on exception dates, if any.

## How do I set the Access Schedule for an activity?

Typically, you add the Access Schedules to an activity when you create the activity, however, you can set it later as well.

1. Open the **Activity details** page for the activity for which you want to add an Access Schedule.

2. Click the pencil next to the **Access Schedule** field.

The **Access Schedule editor** opens.

3. Choose the days of the week for which you want to set the Access Schedule. Use the "+" and "-" icons to add and delete Access Schedule Intervals.

You can set up to two Access Schedule Intervals per day of the week. If multiple days of the week have the same Access Schedule, you can set up the Access Schedule Intervals for all at once.

4. To add the days on which the asset isn't accessible, click the "+" icon in the **Exception Days** section and then choose a date in the calendar. To delete an Exception Day, use the "-" icon.

For Example: You can set this Access Schedule:

- Mon-Fri: 8AM-12PM, 13PM-17PM
- Sat: 10AM-12PM
- Exceptions: 2018-01-01, 2018-05-01

This means that the asset is accessible from 8 AM till 12 PM and from 13 PM till 17 PM, Monday to Friday and from 10 AM till 12 PM on Saturday. It is closed on Sundays. The non-working days are January 1st and May 1st next year.

5. Click **Apply**.

The Access Schedule is saved.

## Overview of Moving Activities

When you identify an activity or a group of activities that are in jeopardy, you can move the activities to another resource or a bucket for re-assignment at a later time. To move an activity that's En route, you must stop the travel, change its status to Pending, and then move it.

You can move activities from three different locations in the interface:

- **List view:** You can move one activity or multiple activities at once. The application proposes resources that might be a good match for the activity. You can also choose where a new activity fits in the new resource's schedule.
- **Time view:** From this view, you can drag an activity from one resource to another. You can move only one activity at a time. The application chooses the best time in the resource's schedule and automatically moves the job to that time slot.
- **Map view:** From this view, you can drag an activity from one resource to another. You can move only one activity at a time. The application chooses the best time in the resource's schedule and automatically moves the job to that time slot.

Here are some reasons for which you want to move activities from resources back to the bucket:

- A resource called in sick and you've already assigned a route to the resource.
- A resource is assigned activities that might place them in an overtime situation.
- An activity is in jeopardy after routing.
- A resource requested a particular day off, but the calendar doesn't reflect it as a non-working day and a route has already been assigned to the resource.

If you try to move 1000 and more activities at once from a bucket to a resource, the **Activity Details** page may not open from the **Dispatch Console** or the **Routing Report** page. Oracle Field Service Core Application downloads information about recently moved activities to the mobile device.

The best practice is to move not more than 100 activities at once from a bucket to a resource's route.

#### Related Topics

- [How do I move an activity using the Assignment Assistant?](#)

## Overview of the Assignment Assistant

You can use the Assignment Assistant to move activities manually.

You also can access the **Assignment Assistant** in the Dispatch Console, only if you have selected the **Use Assignment Assistant on Dispatch Console** setting in the **Activity Management** section on the **User Types** page. On the **User Types** page, you can use these settings to define the behavior of the **Assignment Assistant** page:

- Allow move between resources
- Allow activity move from non-scheduled pool to scheduled one
- Allow access to non-scheduled pool
- Allow activity reorder inside the route
- Allow activity reschedule / move to non-scheduled pool

**Note:** You cannot use the **Assignment Assistant** to move segmentable activities. Further, the **Assignment Assistant** does not support the visit function.

This table describes how you can configure and use the **Assignment Assistant**.

Configure/Perform	Application	Page	Applicable For
Action link 'Move' for activity	Installed App, Core Application	Activity details	Single activity
Action link 'Move' on the activity hint	Core Application	Dispatch Console	Single activity
Move activity by dragging and dropping	Core Application	Dispatch Console List view, Map view	One or several activities
Group action 'Move'	Core Application	Dispatch Console List view	One or several activities

### Move Reason

You can specify the reason for moving an activity manually. This helps your organization understand why you have to make manual changes instead of using the automated routing and optimization features. They can then use this information to improve the operations and routing plans accordingly. You can see the Select Move Reason dialog box, only if your administrator has configured the Move Reasons in the **Assignment Assistant** section on the **Business Rules** page.

If you specify a Move Reason while moving an activity, you can see it on the activity **History** page. You can also use the Manual Assignment by Users and Manual Assignment Trends reports to understand the reasons and trends. For information about the fields in the Manual Move data set, see the Details and Examples: Manual Move Fields Data Set section in the Configuring Applications guide.

You can exclude users that belong to specific user types by providing a Move Reason. For example, contractors need not provide a reason when they move activities. You can configure this using the **Move Reasons are not applicable for selected User Types** field on the **Business Rules** page.

## Understand the Assignment Assistant User Interface

The **Assignment Assistant** is divided into two pages: Main page and Route details page. The Main page lists all the resources and buckets eligible to receive the activities, whereas the Route details page lists the route of a specific resource.

### Main page

The Main page is displayed when you try to assign one or several regular activities. You can view up to five resources on the page and scroll to see more. The time before the shift starts and the time after the shift ends is displayed in grey, similar to the **Manage** page. and This screenshot shows the Main page:

This table describes the legends on the Main page:

Legend	Component	Action or Description
1	Header	If you are moving a single activity, you can view the activity identifier. If you are moving multiple activities, you can view the count of activities.
2	Resources page	Use the <b>Resources</b> page to move the activities to a resource. The resources displayed here meet these conditions: <ul style="list-style-type: none"> <li>• Work zone match</li> <li>• Work skill match</li> <li>• Provider preferences</li> <li>• Required inventories</li> <li>• Activity links</li> </ul>
3	Buckets page	Use the <b>Buckets</b> page to move the activities to a bucket. The buckets displayed here meet the same conditions as the resources do.

Legend	Component	Action or Description
4	History page	View the activities that you have moved in the current session and assign activities to a previously-used resource.
5	Date editor	Reschedule the activity to a different date, or set the activity as non-scheduled.
6	Options—Search and Show all	<p>Search: Search for a resource using the name or external ID. If you are on the Buckets tab, search within the buckets.</p> <p>Show all: Show all resources, regardless of these conditions:</p> <ul style="list-style-type: none"> <li>• Work zone match</li> <li>• Work skill match</li> <li>• Provider preferences</li> <li>• Required inventories</li> <li>• Activity links</li> </ul> <p>If no resources meet the search criterion or if you have disabled <b>Show all</b>, then the message, 'No resources to display' is displayed and <b>Assign</b> is grayed. The message, 'No buckets to display' is shown for buckets in this case. Resource alert, if any is displayed under the resource name when you enable <b>Show all</b>.</p>
7	Time scale	View the start time of the activity.
	Current time	View the current time.
8	Resource/bucket details	<p>View the resource name, photo/avatar/icon, and the parent resource name. The resources are displayed in the order of the most optimal to the least optimal route impact. The order of resources is affected by these factors:</p> <ul style="list-style-type: none"> <li>• Route impact (activity duration + travel time)</li> <li>• Resolved activity coordinates</li> <li>• Distance from the selected activity to the activities in the resource's route and Start/End/Home location</li> <li>• Resource Work Zone match</li> <li>• Accuracy of the travel statistics data</li> </ul>
9	Route impact and hint	<p>View the duration by which the route changes if you assign the activity to this resource. The time includes the extra travel time and the duration of all the activities being moved. It is calculated as (total_activities_duration_after_assign + total_travel_time_after_assign - total_activities_duration_before_assign - total_travel_time_before_assign). Click the column to view the hint. If you move an activity between resources on the same date, the routes impact column contains the summary impact on the routes of both the resources (existing and target). In addition, the route impact hint shows how both the routes are impacted:</p> <ul style="list-style-type: none"> <li>• How the activity duration and travel time of the current owner reduce after the activity is reassigned.</li> <li>• How the activity duration and travel time of the target resource increase after the activity is reassigned.</li> </ul> <p>The current resource details are not displayed when you move an activity:</p>

Legend	Component	Action or Description
		<ul style="list-style-type: none"> <li>From a bucket</li> <li>From a non-scheduled pool</li> <li>To another date</li> <li>From multiple field resources</li> </ul> <p>In these cases, the route impact hint and column show how only the target resource's route is impacted.</p>
10	Activity position	<p>This option is available only for the <b>Resources</b> tab. View the position of the activity on the resource route for each resource. If you change the date, the routes are updated accordingly. The activities that you are trying to move are displayed with a dark border.</p> <p>This option helps you understand:</p> <ul style="list-style-type: none"> <li>Placement: Where the activity is placed in a route.</li> <li>Warnings: Whether the activity being moved or other route activities will be in jeopardy after assigning.</li> <li>Activity statuses: The status of the activities are shown with the defined colors.</li> <li>Not ordered: The number of not ordered activities for resource route.</li> <li>Idle periods: The time slots in which the resource is idle is highlighted on the resource route.</li> </ul> <p>'+N activities' is displayed instead of the route details for each resource or bucket, when you do any of these:</p> <ul style="list-style-type: none"> <li>You try to assign more than 50 activities to the resources for the selected date.</li> <li>You try to assign more than 50 activities to the resources as non-scheduled.</li> <li>You try to assign more than 50 activities to the buckets (both as scheduled and non-scheduled).</li> </ul> <p>The message turns red when at least one of the activities being moved has an alert.</p>
11	Details	Click the arrow to open the Route details page for the resource.
12	Assign button	Click to assign the activities to the selected resource. Activities are located in the same place as displayed on this page. You can move to the Route details page to reorder the activity or set it as not ordered.
Not shown	Activity hint	Click an activity to view the activity hint.

### Route Details page

The Route details page shows the activities in the route of a specific resource for the selected day for which you want to move an activity. When you move an activity, the activity that is moved is highlighted with a darker background. Here is a screenshot of the Route details page:

This table describes the legends on the Route details page:



The screenshot shows a 'Move 2 activities' dialog box. At the top left, it says 'Move 2 activities' with a close button. Below this, the resource 'Bove, Leticia' (FL, USA) is shown with a back link. The date is 'Friday, June 19th, 2020'. A list of activities is displayed, including '09:30 AM 3954829 - Telephony Unwired Installs - LAKE MARY - 327466594' and '01:55 PM 3954830 - 10-12 - Telephony Telemarketing - SANFORD - 327717247'. A 'Not ordered' section at the bottom allows dragging activities to be reordered. Buttons for 'Dismiss' and 'Assign' are at the bottom right.

Legend	Component	Action or Description
1	Header	If you are moving a single activity, you can view the activity identifier. If you are moving multiple activities, you can view the count of activities.
2	Back link	Click to go to the Main page. If you click the back link before clicking <b>Assign</b> on this page, you will lose all the route changes made here.
3	Resource details	View the resource name, photo/avatar/icon, and the parent resource name.
4	Date	View the date for which you are moving the activities. You cannot change the date.
5	Activity details	View the activity details such as activity identifier, activity type, location, and idle time.
6	Stack menu	Use the stack menu to set the activity as not ordered or cancel the move.
7	Warnings	View warnings, if any, for the activity. You can see these warnings: <ul style="list-style-type: none"> <li>• SLA window can be lost</li> </ul>

Legend	Component	Action or Description
		<ul style="list-style-type: none"> <li>• Service Window can be lost</li> <li>• Work zones mismatch</li> <li>• Work skills mismatch</li> </ul>
8	Not ordered	Drag and drop the activity to this space to set it as not ordered.
9	Assign	Click <b>Assign</b> to commit the changes.

### History page

If you have moved at least one activity in the current session, you can see the History page. Use the History page as a quick access page to assign activities to the same resource several times. The page contains a list of technicians and buckets, and is sorted by the time of move, with the last moved activity on the top. For each resource you can see the route impact, activity date, and the number of activities moved. You may see some resources listed multiple times. For example, let's say you have moved activities to a resource twice, for different dates. Then, the resource is listed twice. This screenshot shows the History page:

Move Add Outlets - 327463360
✕

Resources
Buckets
History

Show all

BT

Basile, Terri

FL, USA

+0:50

Friday, September 11th, 2020

+1 activity

>

BT

Basile, Terri

FL, USA

+0:37

Non-scheduled

+1 activity

>

Linked Activities

FL, USA

+0:37

Non-scheduled

+1 activity

>

BL

Bove, Leticia

FL, USA

+0:34

Thursday, September 10th, 2020

+1 activity

>

BT

Basile, Terri

FL, USA

+0:30

Thursday, September 10th, 2020

+1 activity

>

Dismiss

Assign

ORACLE

88

## Non-movable section

You see the Non-movable section when you cannot assign an activity to the current resource. For example, let's say you try to drag-and-drop an activity to a resource that is set as 'Forbidden' for the activity. The activity is then displayed in the Non-movable section and you cannot drag it to other sections as well.

## How Optimal Resources are Suggested

When you use the Assignment Assistant, the application suggests optimal resources to assist you in picking one resource instead of you having to scan through a large list of resources.

The Assignment Assistant provides a more efficient assignment process. For example, there may be multiple available resources who fulfill the activity requirements, however, one resource can be the most optimal because of their proximity to the location. Resources that are optimal for selected activities are highlighted with a badge and displayed at the top of the page.

Here is how Oracle Field Service calculates optimal resources:

- First optimal resource: Resources with the least route impact are set as optimal when they satisfy these conditions:
  - The activities being moved have no violations after the move is performed.
  - The number of other activities with violations is not increased in the route after a move is performed.
- Next optimal resource: The next set of optimal resources must satisfy the conditions that are described for the first optimal resource, and their Extra Travel time is not more than the first optimal resource extra travel time +10%.

This feature helps improve efficiency in the back office operations when users assign activities manually. Other potential benefits of this feature include saving travel time, saving fuel costs, providing an opportunity to assign additional activities, creating more realistic routes, and helping make faster yet efficient decisions.

## How do I move an activity using the Assignment Assistant?

You can move activities from one resource to another, one bucket to another, a bucket to a resource, or a resource to a bucket using the Assignment Assistant. You can move a single activity or multiple activities at once. For your convenience, the procedure to move activities is split between two pages, Main and Route details. Use the Main page to find the specific resource for which you can assign the activity. And, use the **Route details** page to make additional changes such as reordering or setting as not ordered. To move an activity that's En route, you must stop the travel, change its status to Pending, and then move it. This procedure describes how to move a single activity; you can use the same procedure to move multiple activities.

1. Select the activity that you want to move from the **Activity details**, activity hint on the **Dispatch Console, List view**, or **Map view** page.

The **Assignment Assistant** appears and shows the resources that match all the criteria required to move the activity. The resources are sorted on the route impact; the resource with the most optimal route impact is at the top. The order of resources is affected by these factors:

- Route impact (activity duration + travel time)
- Resolved activity coordinates
- Distance from the selected activity to the activities in the resource's route and Start/End/Home location
- Resource Work Zone match
- Accuracy of the travel statistics data

If you move an activity by dragging and dropping and the target resource matches all the criteria, then the application simply moves the activity to the target, without displaying the **Assignment Assistant**. If you move an activity between resources on the same date, then the current resource's name and details are displayed at the top. In addition, the selected activity is highlighted with a dark border. If you reorder an activity within a resource's route, then Assignment Assistant displays the route impact before and after reordering.

2. Review the route impact and the idle time of the resources.

If you move an activity between resources on the same date, the routes impact column contains the summary impact on the routes of both the resources (existing and target). In addition, the route impact hint shows how both the routes are impacted:

- How the activity duration and travel time of the current owner reduce after the activity is reassigned.
- How the activity duration and travel time of the target resource increase after the activity is reassigned.

The current resource details aren't displayed when you move an activity:

- From a bucket
- From a non-scheduled pool
- To another date
- From multiple field resources

In these cases, the route impact hint and column show how only the target resource's route is impacted.

3. By default **Show all** is disabled. Click it to view all the resources, regardless of whether they match the required criteria.

Alerts for resources are displayed below the resource names only when **Show all** is selected.

4. Determine the best resource to which you can assign the activity and click **Continue**.

5. On the **Select Move Reason** dialog box, select the reason for moving the activity.

The reason is required when there's at least one active Move Reason for the current move type (for example, resource to resource). When you move several activities with different Move Reasons, then all the corresponding reasons are available for selection. You'll not see this field if you belong to a User Type that's excluded from providing a Move Reason.

6. Click **Assign**.

The activity is assigned to the selected resource. The activity that's moved is highlighted with a darker background. When you move a not ordered activity, it's shown as ordered on the Main page and the **Route details** page. Therefore, the count of not ordered activities isn't changed on the Main page. However, when you move a not ordered activity to a bucket, the activity status ordered or not ordered is retained.

If you try to assign activities with a total duration of more than 12 hours to a single resource's route, a warning message appears. The message doesn't appear when you assign activities to a bucket or to the non-scheduled pool

of a resource. If you try to move more than 200 activities, then only the duration of the first 200 is displayed in the warning message.

**7.** Make further changes using the **Route details** page:

- a.** To set the activity as not ordered, just drag the activities to the **Not ordered** section. Or, click the stack icon and then click **Set not ordered**.
- b.** To cancel the move, click the stack icon and then click **Do not move**. The activity is removed from this page and isn't assigned to technician. Don't move is not available when only one moved activity remains on the page.
- c.** To reorder the activities within the route, simply drag the activities to the required position.
- d.** To save the changes, click **Assign**. Let's say you've moved a not ordered activity and you haven't set it as not ordered on the Route details page. The activity is added as ordered and is shown in the appropriate position on the route.
- e.** To go to the Main page without saving the changes, click the back arrow.

## Drag and Drop Activities Using Assignment Assistant

You can drag and drop the activities using Assignment Assistant to move them.

Drag and drop the activity that you want to move. These actions occur:

- Selected resource to whom an activity is assigned appears on the top of the list. This resource remains on the screen when scrolling the list of resources.
- Alert message is displayed for selected (top) resource if the resource is violating, 'Show all' resource constraints.
- Other resources are displayed in the 'Other suggested resources' section.
- 'Show all' checkbox is not selected by default. That means, 'Show all' resource constraints are applied to the list of resources.
- The same behavior is applicable for the Buckets tab.

- This image displays the Assign Assistant screen with a Move activity in progress:

# Move PC Trouble Call - 8261 Gottlieb Lakes

Resources

Buckets

History

Th

Q Name or ID

3 m 9 am 10 am 11 am 12 pm

**BT** Basile, Terri  
FL, USA  
**+0:50**  
Work zones mismatch

## Other suggested resources

**AW** Arndt, William  
FL, USA  
**+0:43**



**BL** Bove, Leticia  
FL, USA  
**+1:02**



**CP** Cassell, Philip  
FL, USA  
**+1:09**



D

If the activity cannot be moved for violation of rules, an appropriate alert is displayed.

If you try to assign activities with a total duration of more than 12 hours to a single resource's route, a warning message appears. The warning message doesn't appear when you assign activities to a bucket or to the non-scheduled pool of a resource. If you try to move more than 200 activities, then only the duration of the first 200 is displayed in the warning message.

## Configure Activities as Part of a Visit

You can enable and configure the Visit functionality on the Business Rules screen. If there are other activities matching the same visit bundling keys as the moved activity then Assignment assistant suggests that you move them along with the moved activity.

Follow these steps.

1. To enable the visit functionality:
  - a. Select Configuration, Business Rules.
  - b. Under Visit bundling keys, click the **Enable the Visit functionality** check box.
  - c. Click Save to save the changes.



**2.** To configure the visit functionality:

- a.** Navigate to the Assignment assistant screen.
- b.** Drag and drop the activity that you want to move. These actions occur:
  - Move selected activity only
  - Move selected and other activities matching the same visit bundling keys from current resource. Only activities for the date of selected activity are considered. Other activities are presented by activity identifier and ETA date.
  - Move selected and other activities matching the same visit bundling keys from all available resources. Only activities for the date of selected activity are considered. Other activities are presented by activity identifier and ETA date.

This image displays the options available for a Visit functionality in the Select activity is part of a visit dialog:

## Selected activity is part of a visit

- Move only selected
- Move selected and 1 other from Arndt, William

### **Arndt, William**

---

Cable Telemarketing - 64734 Velda Cape - 49387

---

- Move selected and 3 other from 2 resources

### **Arndt, William**

---

Cable Telemarketing - 64734 Velda Cape - 49387

### **Basile, Terri**

---

RR Commercial Install/Upgrade - 940 Nick Harbors -

---

Multi-type Telemarketing - 5951 Kris Prairie - 86272

---

- c. Click the Continue button to navigate to the Assignment Assistant main screen.

### Results:

To improve the KPI goals and better user experience, we recommend that you configure the vist functionality. This helps save the travel time and mileage and achieve improved utilization of resources.

## Assign an Activity from the Assignment Assistant History Page

If you have moved at least one activity in the current session, you can see the **History** page. Use **History** as a quick access page to assign activities to the same resource several times. The page contains a list of technicians and buckets, and is sorted by the time of move, with the last moved activity on the top. For each resource you can see the route impact, activity date, and the number of activities moved. You may see some resources listed multiple times. For example, let's say you have moved activities to a resource twice, for different dates. Then, the resource is listed twice.

1. From the list of resources, determine the resource and the date for which you want to assign the activity.
2. Click Assign.

The number of activities moved to the resource for the selected date changes. If there are warnings to move the activity to a resource, the date is displayed in red.

3. Click the details icon and review the route details of the resource.

## What are the warning messages displayed while moving activities?

This topic describes the warning messages that you would see while moving activities.

You may see these types of warning messages:

- Service window warning
- Resource overload risk warning
- SLA warning
- Overtime warning
- Linked activity warnings
  - Has successor scheduled earlier
  - Has predecessor scheduled later
  - Has simultaneous activity
- Work zone mismatch
- Work skills mismatch
- Soft skill mismatch

### Resource overload risk warning

The *Resource overload risk* warning message is displayed if you try to assign activities with a total duration of more than 12 hours to a single resource's route. The message doesn't appear when you assign activities to a bucket or to the non-scheduled pool of a resource. The message is displayed when you move activities using these methods:

- Dragging from the List View
- Using the lasso tool on the Dispatch Map

Here is a sample warning message:

Resource overload risk; You are assigning 30 activities with estimated time over 25 hours to a single Field Resource.

If you try to move more than 200 activities, then only the duration of the first 200 is displayed in the warning message.

### Linked activity warnings

The warnings related to linked activities are as follows:

- **Has successor scheduled earlier:** This warning appears for a pending activity linked to another activity that must be started after, but is scheduled before its estimated completion.
- **Has predecessor scheduled later:** This warning appears for a pending activity linked to another activity that must be finished before, but is scheduled after its estimated start.
- **Has simultaneous activity:** This warning appears for a pending activity linked to another activity that must be started simultaneously, but is scheduled to a different time.

**Overtime alert:** This alert notifies you that the estimated completion time of the activity extends beyond the end of a resource's working day.

**Work Zone mismatch alert:** The application doesn't allow you to assign an activity to a resource without a required work zone. The only exception is when the **All** check box is selected. In this case, the resource is shown in red and the "Work zone mismatch" alert appears in its hint.

**Work skill mismatch alert:** This alert displays when you move an activity to a resource that does not have the required and preferred qualification level of an activity skill. The only exception is when the **All** check box is selected. In this case, the resource is shown in red and the "Work skill mismatch" alert appears in its hint. Depending on your settings, the Work skill mismatch alert either prevents you from moving the activity, or gives you the option to move it, or let you cancel the move.

**Soft Skill mismatch alert:** If an activity is to be moved to a resource and a work skill level of this resource is more than (or equal to) the level 'required' to complete this activity, but less than the 'preferred' level, the 'Soft skill mismatch' alert appears. In case of the 'Soft skill mismatch' warning, the resource is not removed from the list of available resources on the **Move activity** page (the **All** check box doesn't affect this behavior). But, it is shown in a different color (blue) than a regular one and the 'Soft skill mismatch' text is shown in its hint message. The 'preferable' skill level is ignored by the 'Self assignment' constraint that is used to filter activities in bucket. In this case the 'required' level is only checked. The 'Soft skill mismatch' warning is shown on attempt to move an activity to a technician with an insufficient 'preferred' skill level.

**don't move alert:** This alert displays when you try to move an activity type that is not allowed to move between resources. Activity types are configured in the **Add activity type** page.

### Resource preferences

- If an activity has a list of Forbidden resources, the application doesn't allow to assign it to one of these resources. They are not shown in the GUI (regardless of the "All" option).
- If an activity has a list of Required resources, these resources are only shown in GUI (regardless of the "All" option).
- If an activity has a list of Preferred resources, these resources are shown in GUI by default. Other resources are returned, if the **All** option is set. In this case, such resources are shown in red and the **Resource is not preferred** message appears for the activity to be moved.

If several activities are selected to be moved at the same time, these rules are used to merge their lists of preferred resources:

- Forbidden
  - The resulting list of the Forbidden resources is a union of the original activity lists.

- Required
  - If activities to be moved have the Required resources, the result is an intersection.
  - Activities without the Required list are not processed. If only one of the two activities has the Required list, this list is only used in the restriction.
  - If two activities have the Required lists and these lists are not intersected, all the activities cannot be assigned together to the same resource.
- Preferred
  - If any of the activities has the Required list, the Preferred resources are ignored.
  - The result Preferred list is calculated as an intersection.
  - Activities without the Preferred list are not processed. If only one of two activities has the Preferred list, this list is only used in the restriction.
  - If two activities have the Preferred lists and these lists are not intersected, all the activities cannot be assigned together to the same resource (can be overridden using the **All** option).

## Group Operations

The Group Operations feature makes it easy to perform the same action on multiple activities simultaneously. For example, you can use this feature when a resource calls in sick after routing has run for the day. The activities for that day can be placed back into the bucket all at once, to be routed to other resources.

### Change Activities in Groups

You can make changes to multiple activities at once.

#### Before you start

The **Group Change** option must be enabled for your user type.

#### Here's what to do

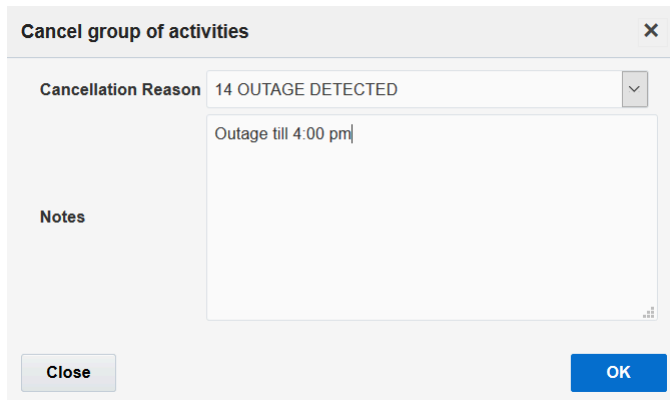
1. Click the hamburger icon and then click **Dispatch Console**.
2. Open the **List view**.
3. Select a resource or bucket from the resource tree.
4. Select the items that you would like to change.
5. Click **Change** from the top of the Work Area.  
The **Change group of activities** dialog displays a list of parameters that you can edit.
6. When you have confirmed your changes, click **OK**.

### Cancel Activities by Group or Team

You can cancel the activities that were assigned to a team that was scheduled to visit a customer. The reasons for canceling could be, the customer canceled the visit, or an outage was announced at the site.

1. Click the hamburger icon and then click **Dispatch Console**.
2. In the resource tree, select the team for which you want to cancel the activity.

3. Select the items that you want to cancel.  
Ensure that all items can be cancelled. Only pending and started items can be cancelled.
4. Click **Cancel** from the top of the **Work Area**.  
The **Cancel group of activities** window appears.
5. Use the drop-down list to select a **Cancellation Reason** and then add any pertinent notes.  
This screenshot shows the **Cancel group of activities** window:



The screenshot shows a dialog box titled "Cancel group of activities" with a close button (X) in the top right corner. Inside the dialog, there is a "Cancellation Reason" dropdown menu currently showing "14 OUTAGE DETECTED". Below the dropdown is a text area containing the note "Outage till 4:00 pm". At the bottom left of the dialog is a "Close" button, and at the bottom right is a blue "OK" button.

6. Click **OK** to complete the cancellation of the selected items.  
Cancelling a repeating activity or teamwork will only cancel it for the current day.

## Add a Pre-Work Activity

You can add a *pre-work* activity for work that you want to complete in advance of another activity.

1. Click the hamburger icon and then click **Dispatch Console**.
2. In the resource tree, click the resource for which you want to assign the pre-work.
3. In the work area, click the activity that requires pre-work.  
The activity hint is displayed.
4. Click **Prework** in the activity hint.  
The **Start Prework** page displays.
5. Select the time required to complete the pre-work activity in the **Duration** field.  
The duration of the pre-work is the duration you have added here and not the one calculated automatically.
6. Click **OK**.

### Results:

The pre-work activity is added to the route.

## Add a Mass Activity

You create a Mass activity when you want several resources to use it at the same time. For example, if all the technicians are required to attend a training, you add a Mass activity.

1. Open the **Dispatch Console**.
2. Select a resource, an organization unit, or a bucket in the resource tree.
3. Click **Actions > Add Activity**.
4. Complete the Activity Notes, Position in Route, Duration, SLA Start, SLA End, and Time Slot fields.  
If **Position in Route** is either Read-Only or isn't configured for the page, the order of the activity is decided based on the Time Slot or Service Window. If **Position in Route** is available, the order of the activity is the same as selected for this field.
5. Click **Mass Activity**.  
The **Mass Activity** check box is displayed only for the activity types for which it's configured.
6. Select the resources that you want to be part of this activity.  
The resource, organization unit, or bucket that you selected in the resource tree is selected by default. This means, the child resources that are part of the organization unit or bucket are selected automatically. If you had selected an individual resource in Step 2, you can select more individual resources as required.
7. Click **Submit**.  
The activity is assigned to all the selected resources and the child resources of the selected organization unit or bucket. Be aware that the activity isn't created on the bucket or the organization unit itself. You can't deselect the **Mass Activity** check box and make it an individual activity after you click **Submit**.  
  
If you've configured the **Expose mass and repeating activities in API for these number of days** field on the **Business Rules** page, the activities are instantiated in the technician's route in advance. If the value for this field is zero then the activities aren't instantiated automatically, but are created only when a route is created.

## Add a Repeating Activity

You can create activities that appear on a resource's route repeatedly for a specified period of time. Examples of repeating activities include meetings and lunch breaks.

1. In the resource tree, select the resource for which you want to assign the repeating activity.
2. Click **Actions**.
3. Select **Add Activity** from the drop-down list.
4. On the next page, select the **Activity Type** and the **Duration**.
5. In the **Position in Route** field, select the order in which the activity must be performed.  
If **Position in Route** is either Read-Only or is not configured for the page, the order of the activity is determined based on the Time Slot or Service Window. If **Position in Route** is available, the order of the activity is the same as selected for this field.

**6. Select the Repeating activity check box.**

This screenshot shows the **Repeating activity** section on the **Add activity** page:

Repeating activity:

Recurrence:  Daily  
 Weekly

Weeks between occurrences\*:

Start Date\*:

End Date (empty-endless):

Days of week\*:  Sunday  
 Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday

**7. In the Repeating activity section,**

- a. Specify how frequently you want the activity to repeat in the **Recurrence** field.
- b. Depending on your selection in the **Recurrence** field, fill up the **Days between occurrences** or the **Weeks between occurrences** fields.
- c. Enter a start date for the activity in the **From** field.
- d. Optionally, enter an end date in the **To** field.
- e. If you have selected **Repeat weekly**, select the day of the week on which you want the activity to repeat.

The days displayed here are based on the **First day of the week** setting in the **General** section of the **Display** page.

**8. Click OK.**

If you have configured the **Expose mass and repeating activities in API for these number of days** field on the **Business Rules** page, the activities are instantiated in the technician's route in advance. If the value for this field is zero then the activities are not instantiated automatically, but are created only when a route is created.

## Duration for Suspended, Reopened, and Pre-Work Activities

You can set the duration for suspended, reopened, and pre-work activities manually. This helps while estimating the remaining duration—it shows the additional work that is needed to complete the activity.

Your Administrator must add the **Duration** field for the **Suspend activity**, **Reopen activity**, and **Start prework**, context layout structures with a Read-Write or Mandatory visibility. When you opens these pages, the application populates the **Duration** field with the activity's initial value. You can modify this value manually, however, be aware of these consequences:

- The new pending activity is populated with the value submitted on the **Suspend activity** page.
- Pework is populated with the value submitted on the **Start prework** page.



- The reopened activity is populated with the value submitted on the **Reopen activity** page.

## Add an Activity to a Shift

You add an activity to a shift, when you want all the resources working in that shift do it. When you add an activity to a shift, the activity is added to the calendars of all of the resources that have the shift assigned to them. For example, all the resources that work in the morning shift are required to go through the fire drill at 10:00 AM on the first Monday of the month.

1. Click the hamburger icon and then click **Configuration**.

2. Click **Work Schedules, Shifts**.

The **Shifts** list displays.

3. Click the **Activities** link in the row of the shift that you want to add the activity to.

4. Click **Add Activity**.

The **Add Activity** page displays. If this activity is an internal activity, the layout of the page changes. If it is a customer-facing activity, the layout stays the same.

5. Complete the applicable fields.

Field name	Action
Activity Type	Select the type of activity that you want to add to the shift.
Name	Enter the customer's name. Used for customer-facing activities only.
Work Order	Enter the work order number associated with this activity.
Duration	Select the number of hours and minutes that the activity lasts.
Position in Route-Not Ordered	Select whether the activity is not ordered. If you select the check box, it appears as <b>scheduled/not ordered</b> in the lower portion of Time view.
Position in Route-Ordered	Select whether the activity is displayed on the resource's route. If you specify a time slot, the activity displays in that time slot. Otherwise, it displays as <b>pending</b> at the beginning of the route.
Time Slot	Select the period of time within which this activity can be started.
Activity Notes	Enter any notes associated with this activity.
Recurrence-Repeats-Daily	Apply to schedules such as every other day or every third day. If you select this option, add the frequency of occurrence in the field <b>Days between occurrences</b> .
Recurrence-Repeats-Everyday	Applies to every day schedules that repeat without exception and without any modification options.
Recurrence-Repeats-Weekly	Apply calendars that have a regular weekly pattern. Select the days that apply to this shift using the check boxes for the individual days. Indicate the frequency of this pattern weekly by adding a value to the <b>Weeks between occurrences</b> field.
Recurrence-Repeats-Yearly	Select this if you want the activity to occur every year from the selected date entered in the <b>From day</b> until the date entered in the <b>To day</b> field.

6. Click **OK**.

## Non-Scheduled Activities

Non-scheduled activities are activities that are not assigned to a specific date. These activities are displayed on the **Not assigned** panel on the **Map view** in the **Dispatch Console**. The visualization of non-scheduled activities on the map helps you manage them better.

You can perform these tasks with non-scheduled activities:

- View on the dispatch map
- View activity details
- Assign to resources
- Find activities for idle resources

The panel with not-assigned activities is displayed only when a bucket is selected in the Resource tree. It displays activities that are assigned to the bucket for the selected date. The **En route** and **Stop Travel** buttons are not displayed in the activity hint for non-scheduled activities.

### View and Assign Non-Scheduled Activities

Non-scheduled activities are activities that are not assigned to a specific date. You can view them on the dispatch map to assign them to resources.

1. Open the **Dispatch Console** and navigate to the **Map view**.
2. Select a bucket in the Resource Tree.
3. Click **View** and select **Show non-scheduled activities**. Click **Apply**.  
Non-scheduled activities are displayed as yellow, red, or pink round markers. Activities that overlap on the map are clustered into one marker with a thicker border. Only the activities assigned to the bucket are displayed. Further, the **Not assigned** panel is displayed on the map, instead of 'Scheduled'.
4. Click **Apply hierarchically**.  
The non-scheduled activities for the bucket and its child resources are displayed.
5. To assign an activity to a resource, drag it from the map and drop it to a resource in the Resource Tree.
6. To move an activity to a bucket, drag and drop it to the required bucket in the Resource Tree, or in the List view or Time view.
7. To assign multiple activities, drag the clustered marker and drop it to the required resource or bucket, or in the List view or Time view.

### Find Activities for an Idle Resource

Sometimes you may have buckets with activities that do not have a completion time. And, there could be some resources that may be idle at some point. You can find such resources and assign activities to them.

1. Open the **Dispatch Console** and go to the **Map view**.
2. Select an idle resource or the bucket where the idle resource is located.
3. Click **View** and select **Show non-scheduled activities** and **Show resource locations on the map**.
4. Click **View** and select **Apply hierarchically**, if you have selected a bucket.
5. Locate the resource on the map.
6. Observe the nearest non-scheduled activities on the map.
7. Determine the activity that is suitable for the resource. Check the details in the activity hint, if required.

8. Drag the activity to the resource in the Resource Tree.

The activity is assigned to the resource.

## Filter Activities by SLA

Sometimes, you may first want to assign activities for which SLA is about to start or expire. You can use a custom filter to find the activities for which SLA is starting or expiring within a specified number of days or hours.

### Before you start

Your administrator must create a filter for example, 'Calendar Days before SLA', 'Full Days before SLA', or 'Hours before SLA'. The **Property** field on the **Add new condition** dialog box must have a value of **Calendar Days Before SLA End** [calendar\_day\_to\_sla\_window\_end], **Full Days to SLA End** [days\_to\_sla\_window\_end], or **Hours to SLA End** [hours\_to\_sla\_window\_end]. The field **Condition** must have a value of  $\leq$ .

### Here's what to do

1. Open the **Dispatch Console** and go to the **Map view**.
2. Click **View** and select **Calendar Days before SLA**, **Full Days before SLA** or **Hours to SLA End**.
3. Add the number of days or hours remaining for the SLA to expire.

Activities that match the criterion are displayed. Here's the difference between "Calendar Days to SLA Start" and "Full Days to SLA Start":

Let's say the current time is "2023-03-20 14:00" and you've an activity for which SLA starts at "2023-03-23 13:59".

The condition that includes "Calendar Days to SLA Start" finds the difference between the date part of the SLA start and the current date (that is, "2023-03-23" - "2023-03-20" = 3 days). Therefore, in this example, a filter condition of "Calendar Days to SLA Start > 2" results in a match.

The condition that includes "Full Days to SLA Start" takes the time into account. Using the same example, the difference between the SLA start and the current time ("2023-03-23 13:59" - "2023-03-20 14:00") would equal 2.999 days, which would be further truncated to 2 days. Therefore, a filter condition of "Full Days to SLA Start > 2" doesn't result in a match.

## Monitor Not-Assigned Activities for the Day

The Not-assigned panel lets you manage activities that are moved, or added to a bucket, and must be completed the same day.

1. Open the **Dispatch Console** and go to the **Map view**.
2. Select the required bucket.

Activities assigned to the selected bucket and scheduled for the current date are displayed on the map and in the **Not-assigned** panel on the right.

3. Click **View** and select **Apply hierarchically**.

The activities for the child resources in the bucket are displayed on the map.

4. Click **View** and select **Show resource locations on the map**.

The locations of the resources in the field are marked on the map.

5. Observe the resources that are located closer to the activities assigned to the bucket.

This way you can determine the nearby resources for not-assigned activities.

## Link Activities

The concept of linking activities applies to a variety of situations in which jobs and resources must be linked and sequenced together over time.

These examples illustrate the diversity of linking activities:

- Let's say a technician is assigned an activity that takes more than a day to complete. How do you make sure that activity continues to be assigned to the technician until it has been completed?
- A group of workers may be assigned to a series of activities related in such a way that the first one must be completed before the second can be started, and so on. What's the most efficient way to keep that big job moving efficiently?
- And, what about a necessary break in a task that creates a gap in a technician's schedule? What can you do to make sure your resources remain productive while "waiting for the paint to dry"?

When activities are related serially over time or when routing relationships cause a break in the schedule, you can link activities and restore efficiency.

The first step in linking activities is to create link types that correspond to the four linking relationships represented graphically on the **New Link** template. The next is to use those link types to link actual activities for Routing.

### Linking Activities Automatically

Oracle Field Service can link two activities based on the information you send to the application using APIs.

### Activity Link Types

Activity link types identify the way that two or more activities are linked. It specifies the constraints, if any, that are placed while assigning and scheduling resources. You can use Start-to-Start, Finish-to-Start, Simultaneous, and Related types of links.

Before you can link activities, you must create activity link types.

Activity link types are generic. You can reuse a link type to link activities over time. Apart from the link type, you can add specific characteristics such as the interval between activities and any rules for assigning and scheduling the resources.

There are two types of activity links:

- Regular link type: This link type places the first activity in the schedule before the second activity.
- Reverse link type: This link type places the second activity in the schedule before the first activity.

The links that you create – both regular and reverse – are available when you link activities.

The activity link type template shown below features four different linkages:

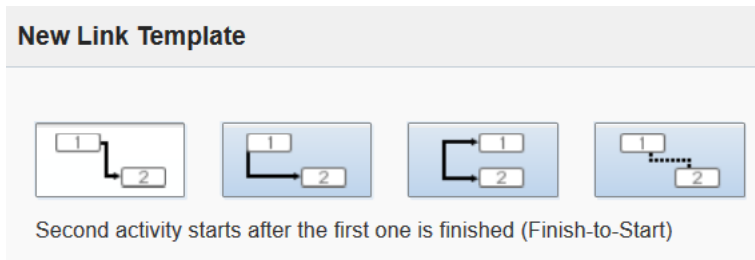
- **Start-to-Start:** Second activity starts after the first has been started.
- **Finish-to-Start:** Second activity starts after the first one has been finished. If you want to start the activities manually, you can still start the activities in any order. Routing enforces the Finish-to-Start constraint while assigning linked activities, but you can still override such constraints. However, if starting an activity out of order sets the other activity to jeopardy, then you will see a warning.
- **Simultaneous:** Both activities start at the same time.
- **Related:** The relationship between these two activities is not sequential.

Because each of these link types generates two different linking options — regular and reverse — your linkage "library" could begin with at least eight link types. These might further be differentiated by the amount of time between activities and any assignment and scheduling constraints you want to place on them. For example, same technician over two days, or different technicians on the same day.

## Create an Activity Link Type

You must create activity link types, before you can link activities. Activity link types define how the activities are linked. For example, the minimum interval between activities, the constraints for scheduling activities, constraints for assigning activities, and so on.

1. Click the hamburger icon and then click **Configuration**.
2. Click **Link Templates**.  
The **Link Templates** page appears.
3. Click **Add Link Template**.  
The **New Link Template** dialog box displays.
4. Select the graphic at the top of the dialog box that represents the way that you want to link the two activities.



5. Enter the **Minimal Interval** of time between the two activities in minutes (min).
6. Enter the **Maximal Interval** of time between the two activities.  
For example, if the minimal interval is five minutes, the maximal might be ten or more minutes.
7. Select one of these **Assignment Constraints** that you want to place on assignments.  
**Different resources:** This constraint requires that the linked activities be assigned to two different resources. **Same resource:** This constraint requires that both activities be assigned to the same resource.
8. Select one of these **Scheduling Constraints** that you want to place on the days for which the activities are scheduled.  
**Different Days:** This constraint requires the activities to be scheduled for two different days. **Same day:** This constraint requires they be scheduled for the same day.
9. Enter a **Name** and a **Label** for this link type.  
The name is what is displayed in the Web interface. The label is used by external systems when they submit information through the API.
10. Check the **Active** box in the **Status** field to make this link type available for use.
11. Click **Save**.

## Link an Activity

You can link activities to make sure that they occur in a certain order when the routing is run. Activities you might want to link include, a trip to the depot to pick up a piece of non-standard inventory prior to an installation, or a job that involves multiple workers performing related tasks in a certain sequence. You can automatically link activities using Inbound APIs.

### Before you start

You must create link types, before you can link activities.

To link activities manually:

### Here's what to do

1. Click the hamburger icon and then click **Dispatch Console**.
2. On the resource tree, select the resource that has the first activity assigned to it.  
The resource's activities display.
3. Click the first activity that you want to link.  
The activity hint displays.
4. Click **Details** to view the activity details.
5. Click **Activity Links**
6. Click **Add link**.  
The **Add link** dialog box displays.

7. Select the type of link that you want to use from the drop-down list, that is, **Start after**.
8. Use the next field to search for the activity that you want to link to the first activity.
9. Click **Link**.  
The new link displays in a GANTT-like chart.
10. If an error message displays, hover over the error icon to review the message and make changes as necessary.  
Error messages may relate to unsupported links, the maximum and minimum intervals required by the link type you have chosen, or to other scheduling and assignment constraints. You may have to create a new link type.

#### Related Topics

- [Links Page](#)

## Changing Activity Status for a Resource

This section includes these topics:

- [Activate a queue or route](#)
- [Start an activity](#)
- [Add time to an activity](#)
- [Complete an activity](#)
- [Suspend an activity](#)
- [Assign not-done status to an activity](#)
- [Deactivate a route or queue](#)

### Activate a Queue or Route

For the application to monitor delivery in real time and to respond to updates, resources must activate their queue, or route. Suppose that a resource forgets to activate the queue on time, you can activate the queue for the resource.

#### Before you start

To re-set the queue activation time, the user type for the user resetting the queue must have this permission. You can only reset the queue activation time if the queue is not activated. To activate a queue or route:

#### Here's what to do

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select the required resource from the resource tree.
3. Click the gear icon and click **Activate Route**.  
The **Activate route** page appears.
4. In the **Route Activation Time** field, change the time as required, within the same working day.  
The time is displayed in the time display format that is configured for you. You can change the time in increments of five minutes. The time you select here is displayed on Dispatch Console and the activity history, and sent to external applications through integrations. If you are offline, you cannot change the route activation time. You must switch to online to activate the route with the time that differs from your current time.
5. Click **Submit**.

## Enable or Disable Activation of the Route for a User Type

You can now enable or disable activation or reactivation of the route for a particular user type:

To enable or disable activation or reactivation of the route for a user type, use these steps.

1. Click the Navigation button and select Configuration.
2. In the User Types configuration page, select the desired user type.
3. Click the **Enable GPS Telemetry** check box under the Permissions section.
4. To enable route activation, clear the **Disable route activation if geolocation is not enabled on device** check box
5. To disable route activation, click the **Disable route activation if geolocation is not enabled on device** check box  
This indicates that the route is not activated. Location services are turned off on the device.

### Results:

When you log into Oracle Field Service and try activating the route, you will see a warning message to enable location services first. Warning messages are as follows:

- Browser:
  - Error Message:  
Route Activation requires your location.
  - Action:  
Enable location sharing on your device. Once enabled, refresh the browser page and “allow” location access when requested.
- iOS app:
  - Error Message:  
Route Activation requires your location.
  - Action:  
Enable location access in your iOS settings.  
To enable location services, navigate to Device Settings, Privacy, Location Services
- Android app:
  - Error Message:  
Route Activation requires your location.
  - Action:  
Click the Enable Now button to turn on location services.

## Start an Activity

Typically, resources mark activities as started when they begin to perform the activities. As a dispatcher, you can start an activity on behalf of a resource, if necessary.



**CAUTION:** You must start activities on time in the application. Oracle Field Service relies on past activity data to project activity durations, travel times, and distances. If activities are not started on time, these projections are not accurate and routing is not optimized.

**Prerequisites:** You can start an activity only under these circumstances:

- The route that the activity is assigned to is activated.
- All previous ordered activities are completed, suspended, marked not done, or cancelled.

A dispatcher can adjust the start time of an activity, but cannot set a start time that would begin before a prior activity's end time. Resources cannot adjust start times. To start an activity:

1. Click the hamburger icon and then click **Dispatch Console**.
2. In the resource tree, select the resource for which you want to start the activity.
3. Click *Time view*.
4. Click the activity to view the activity hint.
5. Click **Start**.

The **Start activity** page appears. The start time defaults to the current time.

6. In the **Start Time** field, change the time as required, within the same working day.  
The time is displayed in the time display format that is configured for you. You can change the time in increments of five minutes. The time you select here is displayed on Dispatch Console and the activity history, and sent to external applications through integrations. If you are offline, you cannot change the time for this activity. You must switch to online to start the activity with the time that differs from your current time.
7. Click **Submit**.  
When the activity starts, it appears in green in all views.

## Add Time to an Activity

If a resource cannot complete an activity by the estimated end time, then they can add time to the activity. If necessary, you can add time to the activity on behalf of the resource. You can add time only to started activities.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select the resource for which you want to add time to an activity in the **Resource Tree**.
3. From **List** or **Time** tab, locate the activity in **Started** status, for which you want to add time.
4. Click **Adjust time** in the activity hint.
5. On the **Adjust time** page, select the estimated time by when the resource can leave the activity site.
6. Click **OK**.

The application automatically recalculates the activities that follow according to these changes.

## Complete an Activity

Typically, resources mark activities as complete when they actually complete the activities. If necessary, you can mark the activity as complete on behalf of the resource.

1. Click the hamburger icon and then click **Dispatch Console**.
2. In the resource tree, select the resource that you want to complete the activity for.

3. Click the hint for the activity that you want to complete and click **End**.  
The **End activity** page appears. The fields on this dialog vary based on the way your organization has configured the application.
4. In the **Completion Time** field, change the time as required, within the same working day.  
The time is displayed in the time display format that is configured for you. You can change the time in increments of five minutes. The time you select here is displayed on Dispatch Console and the activity history, and sent to external applications through integrations. If you are offline, you cannot change the completion time. You must switch to online to completion the activity with the time that differs from your current time.
5. Click **Submit**.  
After you complete an activity, you cannot update its inventory details.

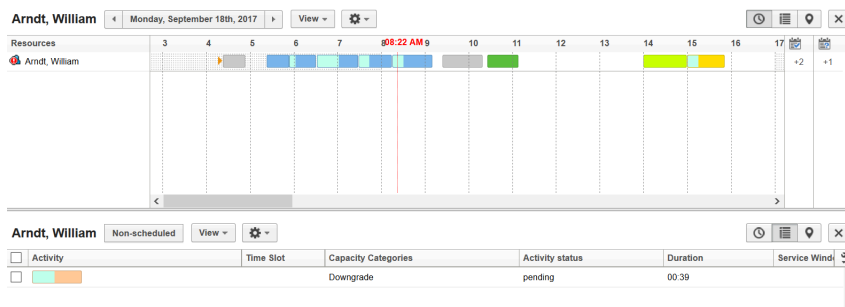
## How can I suspend an activity as a dispatcher?

When resources must return to activities at a later time and they don't want to cancel the activity, they can suspend the activity. If necessary, you can suspend the activity on the resource's behalf.

Suspending an activity captures the time that a resource has already spent working on it. Further, it creates a duplicate activity that the resource can start at any time during the day.

**Note:** You can suspend only started or pending activities.

1. Click the hamburger icon and then click **Dispatch Console**.
2. In the Resource Tree, select the resource for which you want to suspend the activity.
3. Click a started or pending activity that you want to suspend.
4. In the activity hint, click **Suspend**.  
The **Suspend activity** dialog box displays.
5. In the **Suspension Time** field, change the time as required, within the same working day.  
The time is displayed in the time display format that's configured for you. You can change the time in increments of five minutes. The time you select here is displayed on Dispatch Console and the activity history, and sent to external applications through integrations. If you're offline, you can't change the suspension time. You must switch to online to suspend the activity with the time that differs from your current time. When you suspend a started activity, a duplicate of the original activity is created in a suspended status. If you suspend a pending activity, it is converted to a not-ordered pending activity. In the Work Area, the current part of the activity closes. It displays as a suspended activity (scheduled, but not ordered) in the lower half of the page.



6. Select the reason for suspension and add notes, if required.

7. In the **Duration** field, specify the time to complete the remaining part of the activity.  
The duration of the pending activity is the duration that you've added here and not the one calculated automatically.
8. Click **Submit**.  
If you suspend an activity multiple times, the final duration of the activity is considered to be the duration provided for the most recent suspension.

## Assign Not Done Status to an Activity

When resources discover that they cannot complete activities, they mark the activity as *not-done*. If necessary, you can change the status for them. Unlike suspend, which creates a duplicate copy of the activity to be completed the same day, the not-done status is considered to be a final status, like completed.

1. Select a resource from the resource tree.
2. Click the hint for the activity for which you want to change the status and then click **Not Done**.
3. In the Cancellation Time field, change the time as required, within the same working day.  
The time is displayed in the time display format that is configured for you. You can change the time in increments of five minutes. The time you select here is displayed on Dispatch Console and the activity history, and sent to external applications through integrations. If you are offline, you cannot change the cancellation time. You must switch to online to set the activity as Not Done with the time that differs from your current time.
4. In the **Notes** section, add a reason for marking the activity as Not Done. For example: the customer was not home, or the customer asked to reschedule.
5. Click **Submit**.

## Deactivate a Route or Queue

At the end of their shifts, resources must deactivate their routes. You can deactivate the route on behalf of the resource, if necessary.

1. Click the hamburger icon and then click **Dispatch Console**.
2. In the resource tree, select the resource for which you want to deactivate the route.  
The resource's route displays.
3. Click the gear icon and then click **Deactivate Queue**.  
The **Deactivate queue** dialog appears.
4. In the **Deactivation Time** field, change the time as required, within the same working day.  
The time is displayed in the time display format that is configured for you. You can change the time in increments of five minutes. The time you select here is displayed on Dispatch Console and the activity history, and sent to external applications through integrations. If you are offline, you cannot change the deactivation time. You must switch to online to deactivate the route with the time that differs from your current time.
5. Click **Submit**.

## Segmentable Activities

Segmentable activities are activities that you can carry over to the next day. They're normal activities that are split into segments and managed individually. That is, a *Segmentable activity* contains a set of activities, each representing a single-day task with definite start and end times.

You create a segmentable activity based on the total duration of the activity, number of segments, and the duration for each segment. You must also identify the route or the sequence of the segments in the activity. You can represent

segmentable activities graphically and assigned them to one or multiple resources. Segmentable activities have these characteristics:

- These activities also respond to events that occur as the activity progresses.
- Technicians receive segments of segmentable activities in their routes and can handle them as regular single-day activities.
- Segmentable activities are represented as separate bars on the Time view, can be assigned to buckets or technicians, and support time monitoring and status changes.
- Segmentable activities can be linked with regular activities.
- Segments can be generated and planned for up to 99 days in the future.

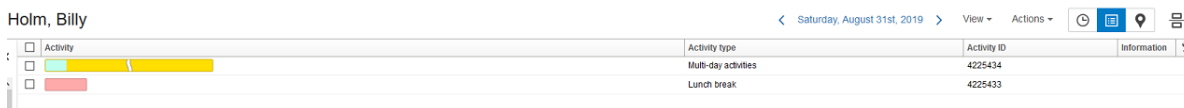
## Segmentable Activities and Their Segmentation

A segmentable activity is a complex task that is segmented, so that the segments can be scheduled and managed individually. This means, a segmentable comprises a set of activities, each representing a single-day task with definite start and end times. You can assign each segment to a different resource. Further, you can start and complete an individual segment or the entire activity. Before you create a segmentable activity, you must create a segmentable activity type.

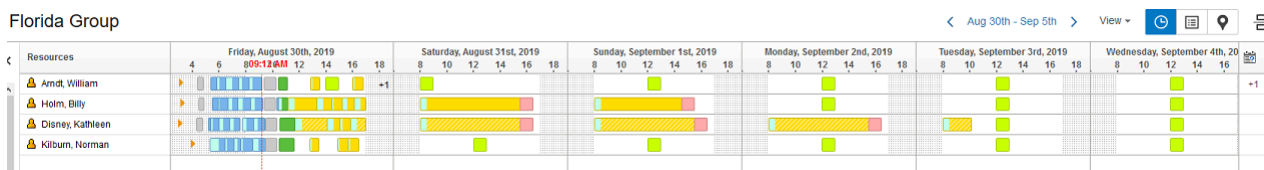
Segmentable activities progress through a lifecycle that is similar to regular activities. They are created in the pending status, they can then be started, canceled, deleted, and suspended. A started segmentable activity can be completed or set to not done. A canceled, completed or not-done activity can be reopened if necessary. However, as opposed to regular activities, actions with scheduled segmentable activities are performed at the level of their segments and may either affect only the current segment or involve the entire activity. For non-scheduled activities with no segments, the **Cancel** action affects the entire non-scheduled activity. If a segment of a segmentable activity is longer than four hours, its bar is shown with a break in the List view. Non-scheduled segmentable activities are displayed in the similar manner.

**Note:** Single day activities that are longer than four hours are also shown as a bar with a break.

In this example, the actual length of a segment or activity bar is shorter than the duration of the segment or activity for better visual representation:



You can distinguish segmentable activity from normal activities on the page displaying multiple routes. When you hover the mouse over a segment of a segmentable activity, all segments of the same activity are highlighted by diagonal lines, as shown in this screenshot:



This helps you find all segments of the same segmentable activity quickly, especially when they are assigned to different resources.

This table provides the individual segment and segmentable activity property value sharing and inheritance rules.

System/Custom	Property	Behavior When Individual Segment is Generated	Behavior When Property is Changed Within Individual Segment	Behavior When Property is Changed Within Segmentable Activity Level
System	Status (for example, Pending, Started)	Segments are created in Pending status	Segments hold their own Status, no sharing or inheritance	Transition of segmentable activity to a terminal state causes: completion/deletion of pending segments
System	Position in route	Segments are created with the ability to be ordered or non-ordered, according to the activity type feature defined for the Segmentable activity.	Segments hold their own Status, no sharing or inheritance.	Position in route for segmentable activity is either ordered or non-ordered. If the value is changed, pending segments are updated: from being not "Non-ordered" to "Ordered" and vice-versa.
System	Duration	Segments are created with the Duration value, within the constraints and optimized route in presence of other activities.	Segments hold their own Duration values. Within a segment, to access the overall activity duration explicitly, Time to complete is used.	Non-scheduled portion of the segmentable activity is a buffer for difference between total activity duration and the sum of created segment durations.
System	Time to complete	Segments have access to segmentable activity's "Time to complete", but don't hold own values. Value doesn't include finished segments.	Segmentable activity's "Time to complete" field is updated.	Segments have access to the updated value of the segmentable activity's "Time to complete".
System	Other system properties	Segments are created with the value of property from Segmentable activity.	If Segment is Pending: When a property value is updated in any segment, the new value is updated in all other pending segments and the segmentable activity. If Segment is not Pending: segment retains its own value.	When a property value is updated in a segmentable activity, the new value is updated in all pending segments. Property values for segments not in Pending status are not updated.

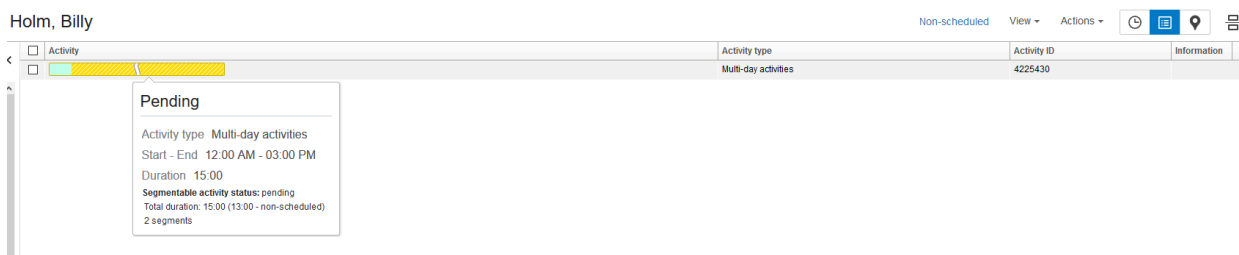
System/Custom	Property	Behavior When Individual Segment is Generated	Behavior When Property is Changed Within Individual Segment	Behavior When Property is Changed Within Segmentable Activity Level
Custom	File	Segments are created with the reference to the file from Segmentable activity. System doesn't make a clone of the file content itself. Instead, it creates a reference.	When a new file is uploaded for one of the segments, there is no change in other segments and no change in segmentable activity - they retain the file they had before.	When a new file is uploaded for a Segmentable activity, there is no change in other segments - they retain the file they used to have. The observed behavior is the same as for any other "custom property".
Custom	Other custom properties	Segments are created with the custom property value from the segmentable activity.	If a segment is pending: When a custom property value is updated in any segment, the new value is updated in all other pending segments and the segmentable activity. All non-pending segments retain their values of custom properties.	When a custom property value is updated in a segmentable activity, the new value is updated in all pending segments.  All non-pending segments retain their values of custom properties.

## Non-Scheduled Segmentable Activities

You can create or move a segmentable activity to the non-scheduled pool of a bucket or a technician. In this case, no segments are created and only the total duration of the segmentable activity is shown in its details.

Segments of a non-scheduled segmentable activity are not displayed on the **My Route** page.

This screenshot shows a non-scheduled segmentable activity:



If you move a segmentable activity from the scheduled to non-scheduled pool, all segments are removed. In addition, the activity is merged into a single entity with the defined duration. Its behavior is the same as that of an activity created in the non-scheduled pool.

## Not-Ordered Segmentable Activities

If you have selected the **Support for not-ordered activities** option for the segmentable activity type, you can create a segmentable activity as not-ordered, that is, without a specific place in the route.

One segment is always created on the first day of the activity, regardless of whether there is time available or not. This segment of minimal duration always remains in case of further adjustments, so that the resource can monitor the not-ordered activity in the current route.

When a not-ordered segmentable activity is created, its segments duration is between the value of the Minimal duration of a single segment parameter and the value of the Maximal total duration of segments created for a particular day parameter. However, the actual duration of a particular segment can be equal to the available time period in the route, if any. The idea behind this is that the resource must be able to perform the not-ordered segmentable activity between other activities.

## Other Segmentable Activity Specifications

This section includes the specifications for segmentable activities in areas such as property inheritance, activity search, travel time calculation, work zone and work skill support, inventory and required inventory support, capacity management and routing, and so on.

### Property inheritance from a segmentable activity to its segments

In a pending segmentable activity, segments inherit all fields and custom properties, except for the Duration and Position in route fields. These two fields are determined for each segment. If you add a file property to a segmentable activity, the content of such property is not cloned to each segment. Instead, a reference to the file property is created for segments. If you upload a new file to a started segment, the new File ID is used only for the segment for which it was created. All other segments refer to the file uploaded to the entire activity, if any.

### Activity search

The search is performed both in the activities and in their segments. Therefore, the search results may include these:

- All existing segments of a scheduled segmentable activity. The activity itself is not returned.
- Non-scheduled segmentable activities.

There is no visual difference between segmentable activities and single-day activities in the list of search results.

### Support of Work Zones, Work Skills, and preferred resources

If you have selected the Support of work zones, Support of work skills, and Support of preferred resources options for the segmentable activity type, they will be determined for all activities of such type. The work zone, work skills, and preferred resources are determined for the entire segmentable activity and retrieved for each segment on demand. The same work zone, the set of work skills, and the same preferred resources are applied to all segments.

### Travel time calculation

If you have selected the 'Calculate travel' option for a segmentable activity, then the travel time is calculated for all the segments. The calculation logic and usage for statistical purposes is the same as that for single-day activities.

### Support of inventory and required inventory

Any inventory added to a segmentable activity is added for the entire activity. Each segment shows the same set of inventory. Any inventory action (install, deinstall, add, and so on) can only be performed on a specific segment. However, these operations will update the inventory list for the entire segmentable activity and, consequently, the inventory list shown for all other segments. Similarly, any required inventory is also assigned to the segmentable activity rather than its segments. The same required inventory is shown for all segments. All required inventory actions are

performed for the segmentable activity and update the required inventory list for all segments. Note: Required inventory added to a segmentable activity sets no assignment restrictions. No alerts are shown when the resource's inventory does not match the required inventory.

### Capacity management and routing

segmentable activities are not included in capacity and quota calculation. No capacity categories are calculated for segmentable activities and neither are they included in the Used values. However, segments of segmentable activities are added to the Other activities value, therefore, the capacity is still consumed. Also, they are included in the start-time statistics. Segmentable activities can be assigned manually or through Immediate Routing plans. These rules apply for Quota Management:

- Segmentable activities are handled as "internal" activities.
- Segmentable activities cannot be booked with the "get\_capacity" function. This function doesn't calculate capacity categories for such activities.
- Segmentable activities are not included in the **Used quota** values on the **Quota** view. Instead, they are added to **Other activities**.

### Activity links

If you have selected the Support of links option for the segmentable activity type, you can link it with other activities. When you create a link to a segmentable activity, the link is always made to the entire activity and never to a particular segment. Therefore, not all types of activity links can be used for segmentable activities. Links defining the sequence of activities make no sense with segmentable activities which can be split between different days and resources, when their separate segments are moved, rescheduled, canceled, and placed in the non-scheduled pool. segmentable activities can be linked to other activities on the basis of assignment constraints defining whether activities must be assigned to the same resource, or to different resources. You must create the link template for segmentable activities using the Related link type. If you have selected a different link type, the error message, 'Unable to create link of this type for segmentable activity.' is displayed. If a segmentable activity is linked to another activity, an alert informing of the existing link appears as follows:

- Manage—in the Links tab of the Activity details page
- Manage—in the Move confirmation dialog
- Installed App—on the Linked activities page

The link data displayed for a particular segment relates to the entire segmentable activity. Adding or deleting a link for a segment actually adds or deletes a link for the entire activity.

### Nearby activities search

You cannot search for segmentable activities or their segments using the Nearby Activities option.

### Activity history

You can retrieve history from both, a non-scheduled segmentable activity and a segment of a scheduled segmentable activity. The history for a non-scheduled activity contains records for the activity itself. The history for a segment contains records for the current segment and for the entire activity. Some actions relate both, the segmentable activity and one of its segments. In this case, the history contains two records, the one for the entire activity marked with (segmentable activity) in the Action column.

### Processing of segmentable activities by Daily Extract

Daily Extract stores segmentable activities and their segments together with activities of other types and extracts them into the Activity Fields file. You can identify segmentable activities by their type—'multiday\_activity' for the entire activity and 'multiday\_activity\_segment' for individual segments. If a segmentable activity is still in progress, each daily



extraction contains the completed segments of the activity in the current day routes. As soon as the entire activity is completed, the extracted file contains the data of both, the individual segments and the entire segmentable activity.

## Add a Segmentable Activity

You can segment a complex task to create a *segmentable activity* in a pool of a *bucket* or a *route*. You can also mark the activity as *Scheduled activity* or *Non-scheduled activity* after creating.

### Before you start

Before you create a segmentable activity, ensure that you've created an activity type for segmentable activities.

### Here's what to do

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.
3. Click **Add Activity**.  
The **Add Activity** page appears.
4. Enter the appropriate information in these fields:
  - a. Select the order of the activity from the **Position in Route** drop-down list.  
This option is available only when you create a segmentable activity in a route.
  - b. Enter the customer **Name** for the customer facing activities.
  - c. Enter the **Duration** of the activity.  
You must enter the duration between 5 minutes and 9999 hours, 55 minutes.
  - d. Enter the **Work Order** number associated with the activity.
  - e. Select the type of work order from the **W/O Type** drop-down list.
  - f. Enter the appropriate **SLA start** and **SLA end** dates.
  - g. Optionally, you can also add or view this information in the tabs:

Tab	Description
Customer Info	Indicates the address of the customer.
Service Info	Indicates the service details of the activity.
Equipment	Indicates inventory details necessary for the activity.
Preferred Resources	Indicates the resource requirements and preferences.
Messages	Shows the log of all the outbound messages pertaining to the activity.
History	Denotes the history of the activity.
Links	Denotes the links between the associated activities and dependencies.

5. Click **Submit**.

The segmentable activity is created in the *pending status*. You can also see the segments on the **Activity Links** page, where the segments are linked with the Finish to Start link type.

6. To segment a segmentable activity:
  - a. Click **Actions** in the list view.
  - b. Click **Add** activity.  
The **Add Activity** window opens.
  - c. Select the **Activity Type** and enter the **Duration** for the segment.
  - d. Click **Submit**.  
The segment is created.

In the **List view** of the segmentable activity, a hint opens for each segment, showing the status, duration, time, and details. You can also start, complete, cancel, and view the directions of a segment.

## Constraints on Creating a Segmentable Activity

When you create a segmentable activity, the application generates its segments automatically. While generating the segments, the application takes into account various constraints ensuring efficient task distribution and compliance with the customer agreements.

These constraints apply to a scheduled segmentable activity:

- When you assign a scheduled segmentable activity to a route, its segments are always generated starting from the date of the route. The first segment is always inserted on the day for which the activity is scheduled, regardless of whether a corresponding free time interval is available in the route.
- The minimum duration of a single segment is always observed. If the route for a particular day has no time interval for a minimal single segment, no segment is created for that day, except the first segment, which is always created on the selected date.
- If there is no interval available for assigning the remaining duration for 31 days after the last assigned segment is created, the remaining duration is moved to the non-scheduled pool of the same resource making the activity partially scheduled.
- The service window constraint applies only to the first segment of a segmentable activity in the route.
- When creating a segmentable activity, the application should observe the service window constraint not only for the segmentable activity but also for other activities in the route. However, the less time that remains from ETA to the service window end, the higher is the probability of service window overdue. To reduce the overdue probability, the application reserves 20% of the service window scheduling the activity only to the first 80% of the service window interval.
- In addition to the service window reservation, the **Service Window Warning** parameter defined on the **Display** page also controls the service window compliance.
- If the **SLA start** corresponds to the day on which the segmentable activity is started, this value is used as the minimum ETA for the first created segment of such activity.
- No segmentable activity segments are created on non-working days. If a non-working calendar is assigned to a resource after the segmentable activity is created, the segment assigned to that day is not moved automatically. An alert is displayed, indicating that a manual action is required. Such behavior is intended to prevent unnecessary segment changes, or removals when the calendar is changed only temporarily.
- On-call calendar is ignored in segmentable activity segment creation.
- When a segmentable activity is non-scheduled, no segments are created. Segments are created as soon as the activity is scheduled to a particular day.

## Segmentable Activity Hint

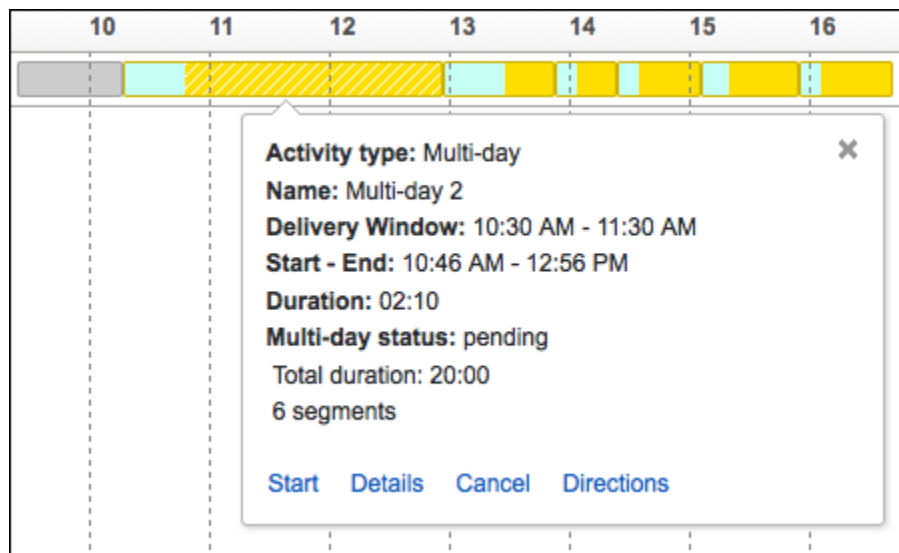
Similar to regular activities, segmentable activities also show a hint when you click them. Hints appear on the bar of a scheduled activity segment, or on the bar of a non-scheduled segmentable activity.

Typically, the segmentable activity hint content is defined in the **Visible hint columns for activities** context layout. At the same time, hints of segmentable activities or their segments always contain the segmentable status property regardless of the context layout settings. This property has different formats depending on the activity status. This table describes how hints are displayed for segmentable activities:

### Segmentable Activity Status and Hint

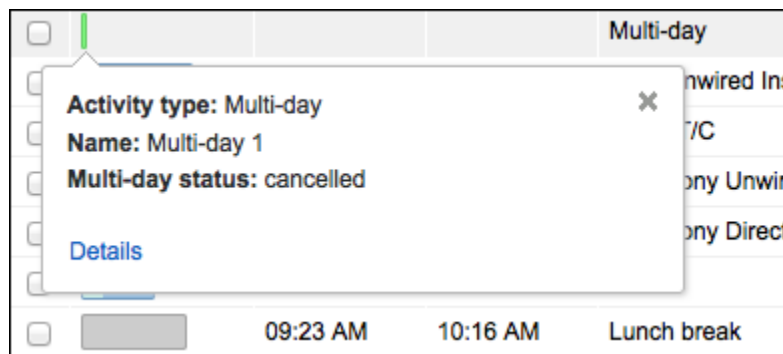
**Scheduled pending, complete, and not done activities:** The hint contains the activity status, the total duration of the segmentable activity and the total number of segments into which the segmentable activity is split. The **Duration** field shows the duration of the selected segment.

This screenshot shows the hint dialog for a pending segmentable activity:



**Cancelled activity:** The hint contains the activity status (cancelled).

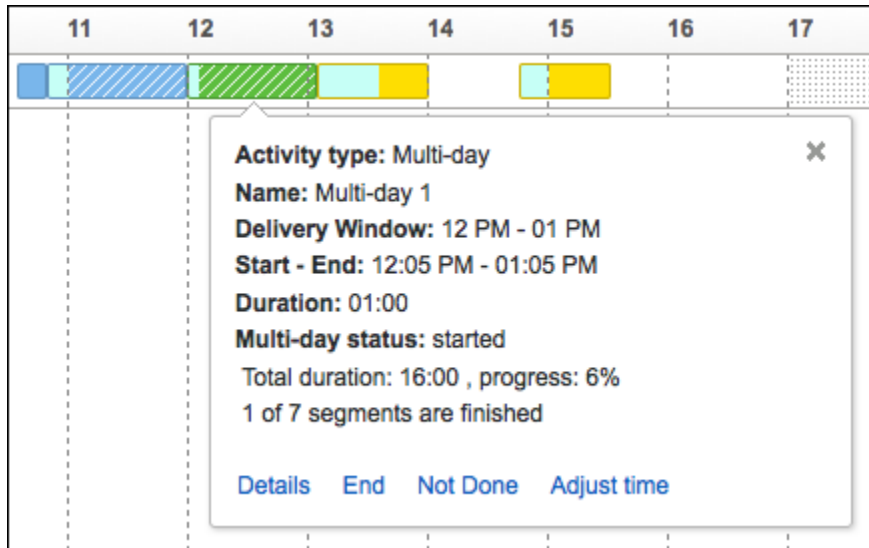
This screenshot shows the hint dialog for a canceled segmentable activity:



### Segmentable Activity Status and Hint

**Segments of started activities:** The hint contains the activity status, the total duration of the segmentable activity, the percentage of activity progress, the number of segments in a final status in the total number of segments. The **Duration** field shows the duration of the selected segment. The progress value is calculated as the combined duration of all finished segments divided by the total duration of the segmentable activity. In this case the total number of segments does not include canceled and deleted segments.

This screenshot shows the hint dialog for a segmentable activity segment:



**Non-scheduled activity:** The hint contains the activity status (pending) and the total duration of the segmentable activity with the non-scheduled duration shown separately. As opposed to scheduled activity segments, the **Duration** field shows the duration of the entire segmentable activity. The hint also contains the number of segments created out of the non-scheduled segmentable activity, which for fully non-scheduled activities is always 0.

This screenshot shows the hint for a non-scheduled segmentable activity:

**Segmentable Activity Status and Hint**

**ARNDT, William** Non-scheduled View

<input type="checkbox"/>	Activity	Start	End
<input type="checkbox"/>			
<input type="checkbox"/>		12:00 AM	08:00 PM

**Activity type:** Multi-day ✕

**Name:** Multi-day Non-scheduled

**Start - End:** 12:00 AM - 08:00 PM

**Duration:** 20:00

**Multi-day status:** pending

Total duration: 20:00 (20:00 - non-scheduled)

0 segments

[Details](#) [Cancel](#) [Directions](#)

**Partially-scheduled activities and their segments:** When a part of a non-scheduled segmentable activity has been moved to the route(s) generating one or more segments and the rest of the segmentable activity remains in the non-scheduled pool, the hints of both the scheduled segments and the non-scheduled part of the segmentable activity contain the activity status and the total duration of the segmentable activity with the 'non-scheduled' duration shown separately. The hint also contains the number of segments created out of the non-scheduled segmentable activity. The **Duration** field of a scheduled segment shows the duration of such segment, while the **Duration** field of the non-scheduled part of the activity shows the total activity duration.

This screenshot shows the hint for a partially-scheduled activity:

**Activity type:** Multi-day ✕

**Name:** Multi-day Non-scheduled

**Delivery Window:** 11:45 AM - 12:45 PM

**Start - End:** 12:14 PM - 01:29 PM

**Duration:** 01:15

**Multi-day status:** pending

Total duration: 20:00 (17:45 - non-scheduled)

2 segments

[Details](#) [Cancel](#) [Directions](#)

**Activity type:** Multi-day ✕

**Name:** Multi-day Non-scheduled

**Start - End:** 12:00 AM - 08:00 PM

**Duration:** 20:00

**Multi-day status:** pending

Total duration: 20:00 (17:45 - non-scheduled)

2 segments

[Details](#) [Cancel](#) [Directions](#)

[Select resource](#)

### Segmentable Activity Status and Hint

Segmentable activity hints appear on **Time**, **List** and **Map View** containing the same information.

## Segmentable Activity Status

A segmentable activity has an own status which in some cases may be different from the status of its segments. The status of a segmentable activity is determined by the activity progress and by the statuses of its segments.

The status of segmentable activities is as follows:

- A segmentable activity is created in the pending status and remains pending if all its segments are in the pending, cancelled or deleted status, or if it has no segments at all (non-scheduled segmentable activities).
- As soon as one of the segments is started, the status is changed to started.
- When one or more segments of a segmentable activity are in the completed or not done status, and there are no other started or pending segments, the activity has the completed status.
- A segmentable activity is in the completed or not done status when one or more segments of a segmentable activity are in the completed or not done status, respectively, and there are no other started or pending segments.
- A segmentable activity changes its status to cancelled when all its segments have been canceled or when the entire activity is canceled together with one of the segments. At the same time no segments must be in the completed or not done status.
- If the canceled activity is in a not-activated route, it can also be deleted. For an activity to be deleted, it must have no canceled segments or segments in activated routes.

## Segmentable Activities in Buckets and Routes

You can assign an activity to the *route* of the *bucket* and reassign it to the resource route.

You can create segmentable activities in buckets and routes. Be aware of these points:

- When you create a scheduled segmentable activity in a bucket, it is split into segments and mapped for *capacity management* processing.
- When you create the activity a bucket, only one segment is created for each day. The duration of such segment is equal to the value of the **Maximal total duration of segments created** parameter of the activity.
- If a segmentable activity is created in a bucket that doesn't have a working *calendar*, the first segment is created on the day the activity is created. The duration of such segment is equal to the value of the **Maximal total duration of segments created for a particular day** of the activity. No other segment is created and the rest of the segmentable activity is marked as non-scheduled.
- Segments are not created for the non-working days in the bucket.

## Start a Segmentable Activity

You start a segmentable activity, or an individual segment, the same way you start a single-day activity. However, the segmentable activity starts when its first *pending status* segment is started.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.

3. Select the first pending segment of the segmentable activity.
4. Click **Start** in the list view.

The **Start activity** page opens indicating that the segmentable activity started and the status of the entire activity changes from pending to started.

**Note:** The **Segmentable Status** field always shows the status of the entire segmentable activity. When the first segment of a segmentable activity is started, the **Segmentable status** field of all remaining segments also displays **Started**, regardless of the actual status of the specific segment.

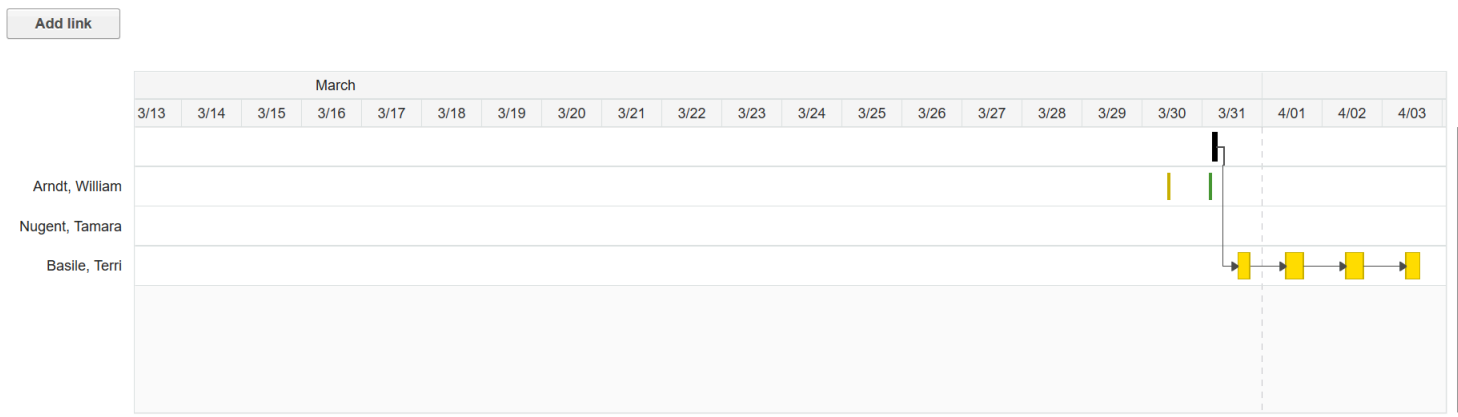
*Related Topics*

- [Complete a Segmentable Activity](#)
- [Cancel a Segmentable Activity](#)
- [Reopen a Segmentable Activity](#)

## Segmentable Activity Links Tab

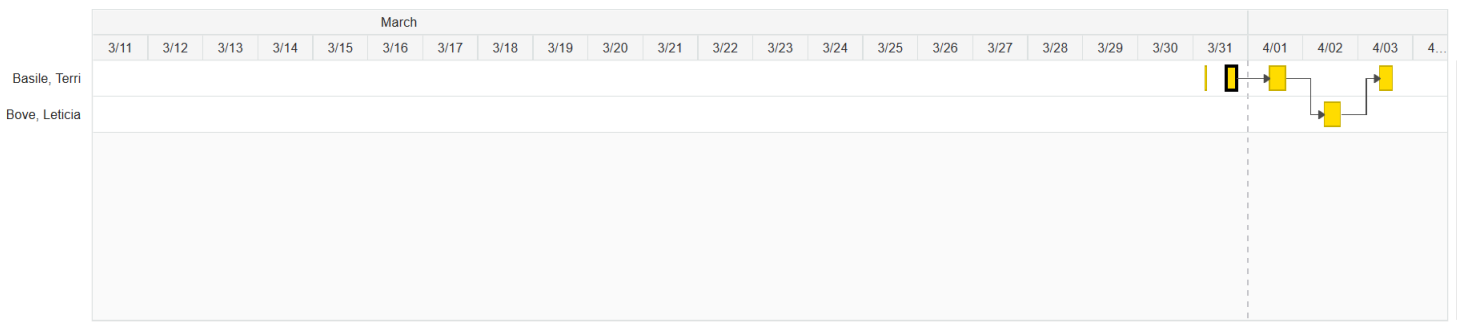
You can link a segmentable activity with another segmentable activity, or with a regular activity. You can see all the segments of a segmentable activity in one place, on the **Details** page of a segmentable activity. The **Links** page shows the activity details on a GANNT-like chart, with the graphical representation of linked activities. The page shows the segments as boxes, which show the activity hints when hovered over. You can click Details in the hint to view the details of a segment.

This screenshot shows the **Links** page:



**Note:** For segmentable activities, the **Links** tab is always visible, regardless of the **Support of links** feature setting.

If several segments of a segmentable activity have been assigned to multiple resources, the chart shows the name of the resource to which a particular segment is assigned, as shown in this screenshot:



If the activity or a part of it is non-scheduled, such activity the segment in a different color.

Activity colors on the chart are the same as in Dispatch Console - Time View. You can see only the activities and not their travel time. Segmentable activity segments and activities that are part of the same visit are shown on the chart, even if there are no other activities linked to a given activity.

## Link a Segmentable Activity with a Regular Activity

You can link a segmentable activity with a regular activity, using specific link types such as Simultaneous, Finish to Start, and Start to Start. You can also see the activity details that show the graphical representation of linked activities such as, segmentable to regular, regular to segmentable, and regular to regular.

1. Ensure that you have created the segmentable activity and the regular activity that you want to link.
2. Open the **Activity details** page for the segmentable activity for which you want to add a link.
3. Go to the **Activity link** tab and click **Add link**.
4. Select the type of link you want to add. For example, Start after.
5. Search for the regular activity that you want to link the segmentable activity with.
6. Click **Link**.  
The activities are linked. If you try to add an unsupported activity link type and/or constraint, a warning is displayed and no link is added.
7. If you want to unlink the activities, click **Unlink**.

## Link a Segmentable Activity with another Segmentable Activity

You can link a segmentable activity with another segmentable activity, using specific link types such as Simultaneous, Finish to Start, and Start to Start. You can also see the activity details that show the graphical representation of the linked activities.

1. Ensure that you have created the segmentable activities that you want to link.
2. Open the **Activity details** page for the segmentable activity for which you want to add a link.
3. Go to the **Activity link** tab and click **Add link**.
4. Select the type of link you want to add. For example, Start after.
5. Search for the other segmentable activity that you want to link the current activity with.
6. Click **Link**.  
The activities are linked and the links show on a GANTT-like chart. If you try to add an unsupported activity link type and/or constraint, a warning is displayed and no link is added.



7. If you want to unlink the activities, click **Unlink**.

## Link Types and Constraints Supported

These tables provide the types of links and constraints supported for linking a segmentable activity with a regular activity and for linking a segmentable activity with another segmentable activity.

This table provides the types of links and constraints supported for linking a segmentable activity with a regular activity.

Link Type	Constraint	Description
Simultaneous (Segmentable and Regular Activities)	No constraints available	N/A
Regular Activity Finish to Segmentable Activity Start	Same Day, Same Provider	<b>Same Day:</b> Regular activity must start (and finish) the same day, the earliest (based on the calendar) segment of the segmentable activity starts. <b>Same Provider:</b> Regular activity must be assigned to the same provider as the earliest (based on the calendar) segment of the segmentable activity.
Segmentable Activity Finish to Regular Activity Start	Same Day, Same Provider, Different Providers	<b>Same Day:</b> Regular activity must start (and finish) the same day the latest (based on the calendar) segment of the segmentable activity finishes. <b>Same Provider:</b> Regular activity must be assigned to the same provider as the latest (based on the calendar) segment of segmentable activity. <b>Different Providers:</b> Regular activity must be assigned to the resource not participating in any segment of the segmentable activity.
Segmentable Activity Start to Regular Activity Start	Different Providers	<b>Different Providers:</b> Regular activity must be assigned to the resource not participating in the earliest (based on the calendar) segment of the segmentable activity.

This table provides the types of links and constraints supported for linking a segmentable activity with another segmentable activity.

Link Type	Constraint	Description
Simultaneous (Segmentable and Segmentable Activities)	No constraints available	N/A
Segmentable Activity Finish to Segmentable Activity Start	Same Day, Same Provider, Different Providers	<b>Same Day:</b> Earliest (based on the calendar) segment of the latter activity must start the same day as the latest (based on the calendar) segment of the former segmentable activity finishes.

Link Type	Constraint	Description
		<p><b>Same Provider:</b> All the segments of the latter activity are done by the same resource(s) that participated in any segment of the former activity.</p> <p><b>Different Providers:</b> All the segments of the latter activity are done by resource(s) different than those participated in any segment of the former activity.</p>
Segmentable Activity Start to Segmentable Activity Start	Different Providers	<p><b>Different Providers:</b> All the segments of the latter activity are done by resource(s) different than those participated in any segment of the former activity. If you try to add an unsupported activity link type and/or constraint, a warning is displayed and no link is added.</p>

## View Segmentable Activity Link Details

You can view the details of the regular activities linked to a segmentable activity on the **Activity link** tab. A GANNT-like diagram containing all the activities linked to current activity is opened. The activity colors on the diagram are the same as in **Dispatch Console - Time View**.

**Note:** Only activities are shown on the GANNT chart, not the travel time.

1. To view the information about the activity on the GANNT chart, click it.  
The standard activity hint is displayed.
2. To view the information about the link, click it.  
The link type and the activity IDs for the link are displayed.

## View and Edit a Segmentable Activity

You can see the overview of a segmentable activity in the Time, List, and Map views. To view or edit the details of the activity, you must go to the **Activity details** page. When you access the activity details from a started segment or a segment in a final status, the **Activity details** page shows only the data of the current segment. When you update the details of a started segment, only the current segment is updated.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.  
The list of activities is displayed for the selected bucket.
3. Click the bucket or resource for which you want to view the activities.
4. Hover over the segmentable activity for which you want to view the details. All segments of the activity are highlighted by diagonal lines. This highlighting helps you find the segments quickly, especially when they are assigned to different resources.  
The activity hint appears.
5. Click **Details**.  
The **Activity details** page appears.

6. Complete these fields:

Field	Description
Position in route	The position of the current segment. You can move the segment to a different position by selecting it from the drop-down list.
Duration	<p>The duration of the current segment. However, there is always the <b>Time to complete</b> field displaying the duration of the entire segmentable activity.</p> <p><b>Note:</b> When you update the details of a segment, the details of the entire segmentable activity and other pending segments are updated. If a segmentable activity has any segments in the past, their details are not updated, though.</p>
Time to complete	<p>The remaining duration of a segmentable activity. This field is pre-filled with a value, which is calculated as follows:</p> <ul style="list-style-type: none"> <li>○ In <b>Cancel activity</b> and <b>Activity details</b>: segmentable activity duration – duration of finished segments</li> <li>○ In <b>Complete activity</b> and <b>Close as Not Done</b>: segmentable activity duration – duration of finished segments – (current time – start time)</li> <li>○ In <b>Reopen segmentable activity</b>: minimum duration of a single segment (according to the <b>Activity type</b> settings)</li> </ul> <p>This field is always present in the details of a segmentable activity. It is added automatically and cannot be configured as part of the context layout. You see this field in these pages as well:</p> <ul style="list-style-type: none"> <li>○ Activity details (for a segmentable activity segment and for an entire activity)</li> <li>○ Cancel activity (if you cancel only one segment)</li> <li>○ Complete activity (if you complete only one segment)</li> <li>○ Close as Not Done (if you close only one segment as Not Done)</li> <li>○ Reopen segmentable activity</li> </ul> <p>The minimal allowed value of the <b>Time to complete</b> field is determined as the greater of the minimal duration of a single segment and the total duration of the existing started segments. You can change the <b>Time to complete</b> value, if necessary. This is the only way to change the duration of the entire segmentable activity.</p>

7. Click **OK**.

The activity details are updated.

## Complete and Not-Done Activities

You can mark an activity status as *Completed* at the end of a task. You can mark activities or segments that you have started but not completed due to various reasons, as *Not done*.

You can mark the activity status as Complete or Not done based on these constraints:

- You can complete or incomplete an entire activity or a single segment of the activity.
- When the *time to complete* and the last segment complete simultaneously, then the activity is marked **Complete**.
- If you complete a segment before the time to complete, the application moves the remaining duration to *non-scheduled* pool and marks the activity as **Started**.
- If you have selected the **Segmentable activity is finished** check box by default for the last segment of the activity, the check box is disabled for all other segments.

- If you complete an entire activity with a segment, which is not the last segment, the application deletes all the remaining segments and marks the activity as complete or not done. Further, it deletes all the subsequent segments from the routes.

### Related Topics

- [Complete a Segmentable Activity](#)

## Complete a Segmentable Activity

You can mark either an entire segmentable activity, or an individual segment as complete. For a segment to be marked as complete, it must be in **Started** status. You can also mark an activity as complete, after you finish the last segment of the activity. You can also mark an incomplete activity as *not done*.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.
3. Open the segmentable activity, which you want to complete in the **List** view.
4. Select the segment with *Start* status and click **End** from the hint.

The **End Segment** window appears.

5. To complete the segment, follow these steps:

- a. Enter the time that is remaining to complete the activity, in the **Time to complete** field.

Initially, the application calculates the **Time to complete** value according to this formula: `segmentable activity duration - duration of finished segments - (current time - start time)`. You can adjust the time to complete when you complete a segment.

**Note:** The **Time to complete** value is automatically calculated only when the form is opened and isn't automatically adjusted when you change the segment completion time (the **Ending at** field). This prevents unnecessary automatic changes to other segments of a segmentable activity.

6. To complete the entire activity, follow these steps:

- a. Select the **segmentable activity is finished** check box.

The **segmentable activity status** drop-down list appears.

- b. Select the final status for the activity from the **segmentable activity status** drop-down list.

**Complete:** Denotes that the activity is complete.

**Not Done:** Denotes that the activity is incomplete due to various reasons.

The selected segment along with the entire activity is marked as complete/ not done. The final status of a segment may be different from the final status of the entire segmentable activity. For example, you can close a segment as **Not done** while the activity has the **Completed** status. The reverse is also true.

7. To set an activity as Not done, follow the steps described in Step 4.

## Cancel a Segmentable Activity

You can cancel a pending segmentable activity or a *pending* segment within the activity.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.
3. In the List view, select the segment or the activity that you want to cancel.

**4. Click **Cancel**.**

The **Cancel Segment** window opens for a segment and **Cancel Activity** window opens for a non-scheduled activity.

**5. If you wish to cancel the entire activity with the current segment, then select the **Segmentable activity is finished** check box.**

If you select this check box, the **Time to complete** field is hidden. You can delete an activity that has all its segments in the **Pending** status in an inactive route, and has no canceled segments. In such case the **Cancel Segment** window displays the **Segmentable activity status** field to select the final status of the activity as deleted or canceled.

**6. Select the **Segmentable activity status** from the drop-down list and click **OK**.**

Option	Description
Deleted	Denotes that the activity is deleted.
Cancelled	Denotes that the activity is canceled.

If the segmentable activity has at least one segment in start status, the remaining pending segments can only be canceled individually. You must first change the started segment to a final status. You also can't cancel the entire activity. You can adjust the time to complete to cancel or delete the activity.

The activity is marked canceled/ deleted.

**7. Adjust the **Time to complete** .**

**8. Select the **Segmentable activity is finished** check box to finish the entire segmentable activity, regardless of any time left on the activity itself. Click **OK**.**

The selected segment is canceled based on these constraints:

- o If you cancel the last segment of an activity and the time to complete expires simultaneously, then the activity is marked complete.
- o If you cancel the segment before the completion of the time to complete, the remaining duration is moved either to non-scheduled pool or to the new segment on the next day, depending on where the activity was created, and the activity is marked as canceled.
- o If you cancel the entire activity along with the current segment, which isn't the last segment of the activity, all the segments are merged to form a single entity and is marked as canceled.
- o If you cancel only the current segment and don't select the **Segmentable activity is finished** check box, the **Cancel segment** window shows the **Time to complete** field with the remaining duration of the activity.
- o When a segmentable activity has a started segment, you must cancel all subsequent pending segments individually. In this case, there is no option in the **Cancel activity** window to cancel the entire activity. You can cancel or delete the selected segment by changing the **Time to complete** field, if needed.

Follow the same procedure to cancel a non-scheduled segmentable activity. The application creates this activity as a single entity without splitting into segments, so you can cancel it only entirely.

## Reopen a Segmentable Activity

You can reopen a segmentable activity that was canceled or changed to any final status. When you reopen a segment, a new segmentable activity is created. The reopened segmentable activity has the same list of segments and other attributes.

**1. Select the activity that you want to reopen.**

2. Click **Reopen segmentable activity** in the **Activity details** page. Or, click **Reopen segmentable activity** from the hint.

The **Reopen activity** page opens.

3. Enter **Duration** to define the duration of the reopened activity.

The duration can be up to 9999 hours 55 minutes.

The reopened activity is created with in the same route and allocated to the same resource associated with the initial activity. The new activity that is created as part of reopening the segmentable activity has the **Pending** status.

## Moving Segmentable Activities

You can move and reschedule all the segments, or a single segment of an activity to a specific date.

You can drag and drop an activity or a segment on a resource or route to move the activity. You can use the duration on the hint to estimate whether the destination time slot is enough to move the activity or segment.

For scheduled segmentable activities, the hint displays the duration of the particular segment and for non-scheduled activities, it displays the duration of the entire activity.

You can use this feature to:

- reassign segments to another resource
- reschedule a segment to another day
- reassign multiple segments to another resource
- reschedule multiple segments to another day
- move segmentable activity or segment to/from buckets
- move segmentable activity or segment to the non-scheduled pool
- move segmentable activity from non-scheduled pool and create scheduled segments for a single day only or generate segments for the entire duration of the activity

You can drag-and-drop activities to perform all these actions, and some others, in the Activities view. The **Move** link is not supported for segmentable activities. When you drag an activity or a segment, a hint prompts you to drop the activity on a resource or route to which you want to move the activity. The hint also contains the activity or segment duration, so that you can estimate whether the destination time slot is enough to move the activity or segment. For scheduled segmentable activities, the hint shows the duration of the particular segment, while for non-scheduled activities it shows the duration of the entire activity.

### Related Topics

- [Move a Segmentable Activity Between Resources or Dates](#)
- [Move a Segmentable Activity Between Non-Scheduled Pools](#)
- [Move a Segmentable Activity in a Bucket](#)
- [Reorder a Segmentable Activity Segment Within a Route](#)

## Move a Segmentable Activity in a Bucket

If you have created a segmentable activity in a bucket, you can move it to a resource's route based on the time available in the route. If the destination route has no available time intervals, the application creates one segment of the minimal duration set for the activity type.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.

3. Select the segmentable activity that you want to move.
4. Drag and drop the segmentable activity to another route.  
The **Move segmentable** window opens.
5. Select one of these options:

Option	Description
Move all segments starting from date	All the segments of the selected segmentable activity are moved to the selected route
Create segments only for date	<ul style="list-style-type: none"> <li>○ Segments are created only for the current date. The remaining segmentable activity is left in the bucket.</li> <li>○ A segment with minimal duration is inserted if the destination route does not have available time interval for that day.</li> <li>○ One or more feasible segments are inserted if the time is available and the segments with higher duration are removed from the bucket.</li> <li>○ The remaining duration of the segmentable activity is redistributed in the bucket, creating new segments if necessary.</li> </ul> <p>Let's say you move a seven-hour segment from a bucket to a resource and the resource's route only has time for one 1-hour segment and one 2-hour segment. The application adds the remaining four hours of the activity to the last segment in the bucket or creates a new segment. No segmentable activity segments remain in the bucket for the current date.</p>

## Move a Segmentable Activity Between Resources or Dates

When you move or reschedule a scheduled segmentable activity, the application deletes all the pending segments and recreates them in the new location. The recreated activity segments can have different destination routes, dates, and duration from the initial activity. In addition, the number of segments may also differ.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.
3. Select the segmentable activity or segment that you wish to move.
4. Drag and drop the segmentable activity to another resource /date.  
The **Move segmentable** window opens.
5. Select one of these move options:

Option	Description
Move only selected segment	Only the segment dragged is moved to the new destination.
Move all segments assigned to this resource for date	All the segments that are assigned to the resource on the same date are moved.
Move all segments starting from date	All the remaining segments of the segmentable activity on and after the selected date are moved.

When only one segment of the segmentable activity is assigned on a selected date, the **move all segments assigned to this resource for date** option is not available. When the selected segment is the last in the

segmentable activity and is the only segment assigned on the selected date, only **move only selected segment** is available.

The segments are moved. If the move action violates any of the applied constraints, a warning message appears indicating the violation.

## Move a Segmentable Activity Between Non-Scheduled Pools

When you drag-and drop a segmentable activity from a *non-scheduled* pool to a resource's route, the application generates an activity with its segments according to the route constraints. You can also move an activity from a route to the non-scheduled pool.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.
3. Select the activity that you wish to move.
4. Drag and drop the segmentable activity to another route.

The **Move segmentable** window opens.

5. Select one of these options:

Option	Description
Generate all segments starting from date	Moves the entire activity and creates its segments from the current date. The resulting segments are placed into the resource's route according to the constraints.
Create segments only for date	Segments are generated only for the current date according to the constraints and the remaining part of the segmentable activity is left in the non-scheduled pool.

The sequence of segments in a segmentable activity is not important. If one or more segments are moved to different resources, the segments (activities) are performed independently.

The activity is moved.

## Reorder a Segmentable Activity Segment Within a Route

You can move a segment to a different place in the same *route*.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.
3. Select the activity that you wish to move.
4. Drag and drop the segmentable activity to another route.

The **Move segmentable** window opens.

5. Select one of these options:

Option	Description
Move only selected segment	The selected segment is moved to a different position in the route.



Option	Description
Recreate all segments in this route	Segments are reordered and the duration and the number of segments are recalculated in the route.

If you select **Recreate all segments in this route**, the application calculates and adjusts the segments per the constraints.

The segments are reordered in the route.

## Suspend a Segmentable Activity

When you must stop working on a segment for the time being and don't want to cancel it, you can suspend it. When you suspend a segment, you provide the time that is required to complete the remaining part of the segment. In this scenario, the application creates a new, duplicate segment (activity) that you can start at any time throughout the day.

**Note:** You can suspend only started or pending segmentable activity segments.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the Resource Tree and go to the **List view**.
3. Click **Adjust Time** in the activity hint for the started segment that you wish to suspend.
4. On the **Adjust time** page, select the time that is still required to complete the segment. Click **Submit**.
5. Click **Suspend** in the activity hint.  
The **Suspend Activity** dialog box opens.
6. Add the reason for suspending the segment and click **Submit**.

Here is the result of suspending a segmentable activity segment:

If...	Then...
You suspend a started segment	Two segments, Suspended and Pending not-ordered are created. The original segment becomes not-ordered. The duration of the not-ordered segment is reduced by the duration of the Suspended part. For example, the duration of the segment is 60 minutes and you have worked for 10 minutes before suspending the activity. Then, the Pending segment is created for 50 minutes. The final duration of the not-ordered segment is not less than the minimum duration of the segment defined for the activity type. However, the duration of the not-ordered segment can exceed the "Maximum total duration of segments created for a particular day" constraint.
You suspend a pending ordered segment	The current segment becomes non-ordered. The remaining details are same as the previous row.
You don't work on the pending segment for the rest of the day, and the segment is moved to the bucket	The duration of the outdated segments is added to the length of the not-scheduled segment. Let's say the not-scheduled segment doesn't exist and there is an outdated segment for which the duration has not been distributed. The application adds this not-scheduled segment through a background process.

## Change or Cancel Multiple Segments

On the List view, you can select the segments of scheduled segmentable activities for group actions, together with other activities in the route. In this case, only **Change** and **Cancel** actions are available, the **Move** action is not available.

1. Open the segmentable activity in the **List** view and select the activities you want to move.  
If you select other activities with segmentable activity segments, the **Move** link is shown, but the move action is applicable only to the other activities. Further, the count of activities denotes the number of other activities.  
The hint appears denoting the number of segments available to change and cancel and the other activities to move.
2. Select the appropriate option:

Option	Description
Change	When you apply this option to one or more pending segments, the details of the entire segmentable activity are updated. If you change the segment with start status, the updates are visible only to the selected segment. If you change a pending segment, the entire activity is updated.
Cancel	You can cancel only the pending segment and not the entire activity. You also cannot update the time to complete the segment when you cancel the segments. When you cancel a group of activities, the route is not recalculated until you cancel all activities selected for the operation. This reduces the time required for the operation and increases the application's performance.

The selected segments are changed or cancelled.

## Activity and Segment Duration Adjustment

You can adjust the duration of activities and the individual segments that comprise them. The duration of the complete task is set up while creating a segmentable activity. You must adjust the *Time to complete* value to adjust the activity and segment durations.

When you first create a scheduled segmentable activity, it is automatically split into segments. The duration of each segment is calculated according to the constraints and the actual time available in the route of the resource. You can adjust the activity and segment duration based on these constraints, however, the purpose, procedure and results of such adjustments may be different.

### Related Topics

- [Adjust Activity Duration](#)
- [How do I extend the duration of a segment?](#)

## Adjust Activity Duration

The duration of a scheduled segmentable activity is the sum of the durations of all its segments. You can adjust the time to complete the activity to manage its duration.

1. Select the scheduled activity and open the **Activity Details** page from a route or a bucket.  
The **Time to complete** value is the total duration of the segmentable activity minus the duration of the already finished segments.  
The **Duration** and **Time to Complete** fields appear.

2. Adjust the **Time to complete** under these conditions:

Option	When
Cancel a segmentable activity segment	If you cancel only one segment of a segmentable activity, you can change the total activity duration simultaneously.
Complete a segmentable activity segment	If you complete only one segment of a segmentable activity, you can change the total activity duration simultaneously.
Set a segmentable activity segment 'not done'	If you set only one segment of a segmentable activity as not-done, you can change the total activity duration simultaneously.
Reopen a segmentable activity	If you reopen a segmentable activity in a final status, you can change its duration at the same time.

The activity duration is changed.

**Note:** If you change the **Time to complete** value, the remaining pending segments are recalculated; the number of segments and their duration may be changed.

How do I extend the duration of a segment?

Although activity segments are generated automatically, you can change their parameters manually. Such manual changes are preserved during further automatic recalculations. Also, if you change a segment manually in a route that contains other segments of the same segmentable activity, such other segments will also be protected against automatic recalculations.

1. Select the segment started in an activity and click the **Adjust Time** link.

The **Duration** and **Time to Complete** fields appear.

2. Adjust the **Time to complete** value under these conditions:

Option	Description
Start a segment	If the route contains pending segments of the same segmentable activity, they are not adjusted automatically with the time adjusted to the started segment. This action causes recalculation of the activity segments in the routes of next days. The routes may be adjusted so that the total duration of the segmentable activity is preserved. If all remaining segments of the segmentable activity are located in today's route, and the started segment adjustment causes their total duration to exceed the total duration of the activity, you must increase the duration of the activity accordingly.
Cancel a segment	If you cancel one of the segments of a segmentable activity, no other segment in the same route is affected. You can change the total duration of the segmentable activity (the <b>Time to complete</b> ), though.
Mark the segment as cancel/not done	You can adjust the duration of a specific canceled /not done segment. The duration adjusted for a segment does not modify the duration of other segments.
Reorder segment within a route	You can adjust the duration of the reordered segment. No other activities and/or segments in the same route are affected.

Option	Description
External events	<p>These external events cause recalculation of all segments of the existing activities of such type:</p> <ul style="list-style-type: none"> <li>○ Adding an activity to the route</li> <li>○ Canceling an activity in the route</li> <li>○ Starting and completing an activity before the segmentable activity segment in the route</li> <li>○ Changing the time slot, duration, or other parameters affecting the ETA</li> <li>○ Calendar changes such as working and non-working hours, shifts, and so on</li> </ul> <p>The duration is adjusted according to the new settings and, consequently, may change the total number of segments. However, any changes made to the segments manually are preserved even if the activity type parameters change.</p>

The segment duration is adjusted. If you change the basic parameters of the activity type such as the **Minimal duration of a single segment** and **Maximal total duration of segments created for a particular day**, the segments of the existing activities of such type are recalculated. The duration of such activities is adjusted according to the new settings, and this in turn may change the total number of segments. However, any changes made to the segments manually are preserved even if the activity type parameters change.

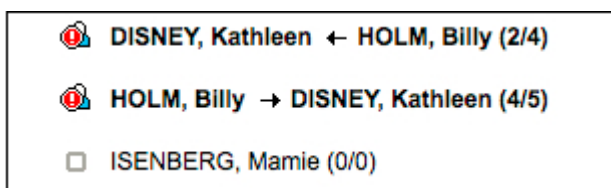
## Teamwork

Teamwork is a feature that allows a resource or group of resources to assist each other to complete work.

There are two roles to be aware of when setting up a teamwork situation:

- team leader – This is the resource who's being assisted.
- assistant – The resource who's assisting.

The team leader and assistant(s) are visible in the **resource tree**. The assistant is shown with an arrow pointing to the team leader. In this screenshot, Billy Holm is assisting Kathleen Disney:



In the assistant's work order queue, time will be reserved and marked as assisting (the team leader). The arrow points to the person who's in need of assistance.

You can assign teamwork in multiple ways:

- Use the **Assign to Team** link in the **Actions** menu.
- Use the **Assign to team** link in the **hints**.
- Drag into the resource tree.

Teamwork functions are very similar to regular activities. The team leader doesn't have to do anything different that they'd normally do since it's the job(s) on the team leader's route in which the resources are assisting. These rules apply for teamwork:

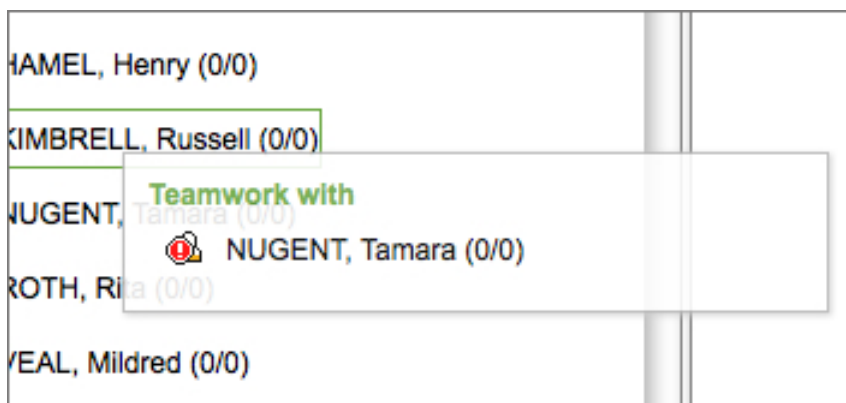
- Both the team leader and individual resources can start and complete teamwork on their mobile device. If a resource can't do this, the team leader can do it for them.
- The assistant can open a teamwork activity and see the route of the team leader on the day of the teamwork.
- The assistant can reschedule a scheduled regular activity assigned to the team leader within the day(s) of teamwork, but can't reschedule it to other day(s) when there's no teamwork.
- The assistant can't reschedule a scheduled regular activity assigned to the team leader to a non-scheduled pool.
- If the assistant tries to perform actions that aren't permitted with a scheduled regular activity assigned to the team leader, the message, "You are not authorized to move the activity" appears.
- When an assistant is set to inactive or has a non-working day, their work skills aren't shared with the team anymore. The 'Work Skills mismatch' alert is displayed on the Move Activity, Assignment Assistant, Time, List, Map views, and Manage pages.

## Assign Teamwork Using Drag and Drop

You can assign teamwork using multiple ways and drag and drop is one of the ways. Be aware that there are two roles involved in teamwork—Team Leader and Assistant. To assign teamwork using drag-and-drop, you drag a resource and drop it on to another.

1. In the **Resource Tree**, select the Resource who will be the assistant.
2. Drag the **Assistant** to the **Resource** who will be the **Team Leader**.

When dragging over names in the Resource Tree, hints may appear to indicate whether or not the selected Resource can participate in Teamwork.



3. Once the **Team Leader** is selected (visible by a green box appearing around the Resource's name) drop the **Assistant** onto the **Team Leader**.

The Teamwork assignment indication appears.

## Assign Resources to a Team

Another way of assigning teamwork is to assign a team to an activity, using the Assign Team option.

1. Select the Resource who will be the assistant from the **Resource Tree**.
2. In the resource hint, click **Assign to Team**.

The **Assists to** context menu appears and displays the hierarchy of the resource tree up to the specific technician that you can select as assisting. If you search for a resource, the search results display the matching resources, sorted in alphabetical order.

3. On the **Add Activity** page, add assisting as an activity. Select the duration, time slot, and position of the assisting activity.

This screenshot shows the **Add Activity** page:

↑ Dispatch Console

## Add Activity

HOLT, Kelly, 03/30/22

Assign  
HOLT, Kelly

Add Activity?

Activity Type  
Assisting

Duration  
hours 2 minutes 45

Time Slot  
Start time 11:30 AM  
End time hh:mm AM/PM

All day

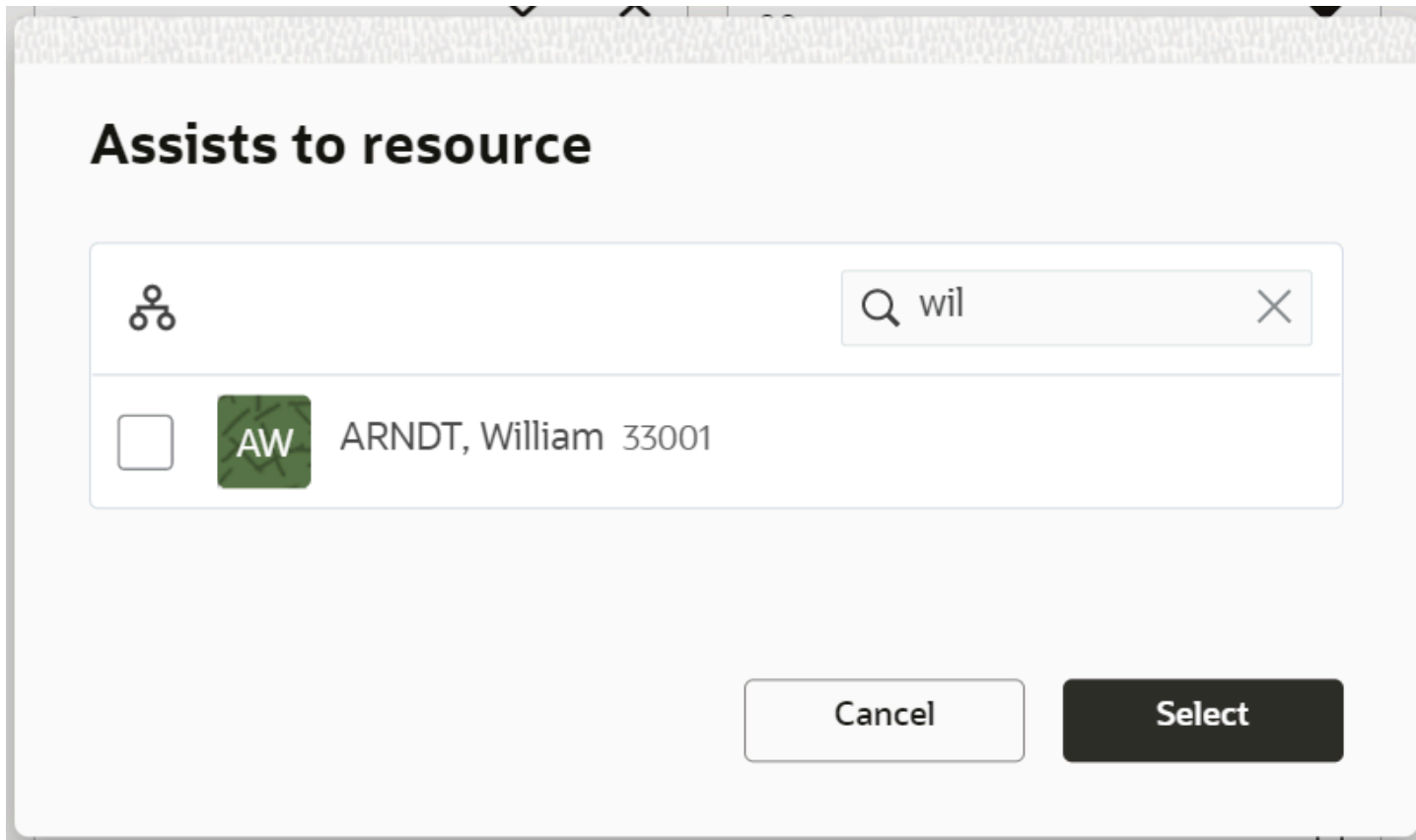
Position in Route  
Ordered, position 2 (Last)

Assists to resource  
ARNDT, William

Repeating Activity

Dismiss Submit

4. Click the Assists to Resource field to display the **Assists to resource** dialog box:



5. Choose one.
  - Use desired filters if necessary.
  - Type the resource name or ID in the search field.

6. Select your desired resource.

Descriptions of the fields on the **Assign resource to team** dialog box are listed below:

- **Assists to:** Select the pencil to search for your desired resource. Start typing the name of the resource in the search field that the selected resource will be assisting (the Team Leader). the application searches and brings up resource options as you type. Or, you can click the name of the resource in the resource tree and it fills in the **Assists to** field.
- **Position in Route:** Select the position of this activity in the route. You can select beginning of route, in between other scheduled activities; end of route, or as a not ordered activity.
- **Duration:** Enter the length of time this teamwork assignment will last by using the drop-down lists for hours and minutes. The initial duration is based on the assistant's calendar for that day, without consideration for what other activities may already be on the route (that is, it's maximum amount of whole hours for the shift). This time is rounded up to the equivalent of whole hours. You can adjust the duration as needed.
- **Time Slot:** Time Slot refers to a time window within which the teamwork must begin. If a time slot is configured, the duration begins within that window, unless a prior activity on the route pushes the



teamwork to start past the defined window. The default is all day, but you can change to reflect a specific time slot. Click **Time Slot** to select the time slot in which you want this activity to be performed.

- **Activity type:** Select the teamwork Activity Type from the drop down list.
- **Repeating Activity:** If this is repeating Teamwork, select **Repeating Activity**. You can indicate whether this Teamwork repeats daily or weekly and on which days or weeks it must repeat. The days and duration of repeating teamwork is based on when you created the activities. Changes made to a team leader's calendar or shift do not update the assistant's repeating teamwork activities. This screenshot shows the Repeating Activity section:

The screenshot shows a form for configuring a repeating activity. At the top, there is a checked checkbox labeled "Repeating Activity". Below this, under the heading "Recurrence", there are two radio button options: "Daily" (which is selected) and "Weekly". Below the recurrence options are three input fields: "Days between occurrences" with the value "1", "Start Date" with the value "03/31/22", and "End Date (empty-endless)" with the value "m/d/y". Each of these three fields has a calendar icon to its right.

The **Assists to field** populates.

7. Once you have completed all required information, click **OK**.

**Teamwork** appears in the Assistant's work queue, and the **Resource Tree** indicates that the Team Leader is being assisted.

## Travel Time Calculation Quality and Alerts

Oracle Field Service (OFS) provides different ways to notify you that the travel between locations (both activity locations and start/final resource locations) may be calculated with low accuracy.

This could be due to data-driven issues along with options to debug the travel-related data quality.

### Route Level Travel Alerts

The screenshot shows the Dispatch Console interface for 'FL, USA' on 'Wednesday, March 30th, 2022'. A resource schedule grid is visible with columns for hours 6 through 12. A tooltip alert is overlaid on the grid, indicating a data quality issue: 'Route may include not exact travels. Neither the coordinates nor the travel key are filled in for the '01:30 PM - Assisting' activity.'

### Alerts Details

Alert	Details	Fix
Resource start/final location is not defined *	Either one or both of the resource locations are empty	efine start and/or final location for a resource
Resource start/final location is geocoded with low accuracy	<ul style="list-style-type: none"> <li>Address of the resource start and/or final locations is incorrect</li> <li>Address of the resource start and/or final locations is correct but cannot be geocoded properly</li> </ul>	<ul style="list-style-type: none"> <li>check if the address of the resource start and/or final locations is correct</li> <li>provide coordinates for those locations manually</li> </ul>
Activity neither has coordinates nor travel key filled	<ul style="list-style-type: none"> <li>Activity address is incorrect</li> <li>Activity address was not geocoded yet</li> <li>Activity address cannot be geocoded</li> <li>Activity travel key fields are (partially) missing</li> <li>Too few statistical data for the given travel key value</li> </ul>	<ul style="list-style-type: none"> <li>check if the activity address is correct</li> <li>provide missing information for key travel fields</li> <li>review travel key field use more broad configuration, if possible.</li> <li>provide activity coordinates manually</li> </ul>
Activity was not geocoded	<ul style="list-style-type: none"> <li>Activity address is incorrect</li> <li>Activity address was not geocoded yet</li> </ul>	<ul style="list-style-type: none"> <li>check if the activity address is correct</li> <li>provide coordinates for the activity manually</li> </ul>

Alert	Details	Fix
	<ul style="list-style-type: none"> <li>Activity address cannot be geocoded</li> </ul>	
Activity is geocoded with low accuracy	<ul style="list-style-type: none"> <li>Activity address is incorrect</li> <li>Activity address cannot be geocoded properly</li> </ul>	<ul style="list-style-type: none"> <li>check if the activity address is correct</li> <li>provide coordinates for the activity manually</li> </ul>

## Travel Estimation Method

The travel estimation method is not only available in the Routing report, but also in the Activity details and Activity history.

In Routing report alerts, travel estimation methods with low accuracy (Expansion and Company Default) have warning sign - red circle with white exclamation sign in it next to the method.

### Geocoding Accuracy in Activity Details

Geocoding accuracy is now available in Activity details. Geocoding accuracy may have one of following three values:

- High - activity is geocoded with high accuracy, coordinates will be used in all travel calculations, no actions needed.
- Medium - activity is geocoded with OK accuracy, coordinates will be used in all travel calculations. However, minor issues are possible; so, it is better to re-check the activity address.
- Low - activity coordinates are vague and thus may not be used for travel calculations, user intervention is required.

The screenshot shows the Oracle Field Service interface for activity details. The title is "Activity details ((Afternoon) Barragan, James)". The form contains the following fields and values:

- Address: 2500 Metrohealth Dr
- City: Cleveland
- ZIP/Postal Code: 44109
- State: OH
- Account Number: [Empty]
- Sub Type: [Empty]
- Time Zone: (UTC-05:00) New York - Eastern Time (ET)
- Message Language: English
- Send day before confirmation alert:
- Reminder: 0
- Email: [Empty] (with Write button)
- Phone: [Empty] (with Call button)
- Cellular Phone: [Empty] (with Call button)
- Coordinate Status: found
- Coordinate X: -81.6989
- Coordinate Y: 41.46245
- Coordinate accuracy: Medium
- Travel estimation method: Airline Distance

**Note:** When the travel estimation method is undefined, the **Travel estimation method** field is not shown. Similarly, when the coordinate accuracy is undefined (for example, when coordinates are set through an API), the **Coordinate accuracy** field is not shown. Coordinates provided through the API are considered to be of high accuracy and thus do not lead to any alerts.

## Add Travel Estimation Method to Required Pages

You can add the Travel Estimation Method to the Activity details page or the List View, so you can monitor the travel quality.

### Recommended Configuration

- Add the travel estimation method and coordinate geocoding accuracy fields to the List view column as it gives good visibility of the travel quality. (When coordinates are geocoded with low quality or only default and/or statistics is used, there is a high chance that the travel is not accurate.) This method is good for debugging a route.
- Add the travel estimation method and coordinate geocoding accuracy fields to activity details for the Dispatcher user type as it gives good visibility of the travel quality. (When coordinates are geocoded with low quality or only default and/or statistics is used, there is a high chance that the travel is not accurate.) This method is good for debugging an activity.

1. To add the travel estimation method and geocoding accuracy fields to activity details:
  - a. Go to **Configuration > User types > Screen configuration > Application screens > Activities > Edit/View activity**.
  - b. Drag and drop an **Input** element.
  - c. In the **Activity field** drop-down list, find the **Travel estimation method** and **Coordinate accuracy** fields and add them with RO visibility.
2. To add travel estimation method and geocoding accuracy to the List View columns:
  - a. Go to **Configuration > User types > Screen configuration > Application screens > Dispatch Console > List view columns**.
  - b. Click **Click to add**.
  - c. On the **Add property** dialog box, find the **Travel estimation method** and **Coordinate accuracy** fields and add them with RO visibility.

## Non-Travel Activities

When an activity does not require travel (that is, you have cleared the **Calculate travel** check box for the Activity type), the idle time before that activity is considered as travel to the next activity that requires travel in the route.

You can split the travel between activities into two (or more) pieces by inserting non-travel activities in between. As a result, in Time View, non-travel activities are placed over the travel time for activities that require travel. A non-travel activity may have a different location when compared to the previous travel-required activity (or provider start location), if a non-travel activity is placed over a travel-required activity.

To understand the concept better, let's consider this sequence of activities:

- First activity: For example, installation requires travelling, ends at 10:00
- Second activity: For example, phone call doesn't require travelling starts at 17:00 and ends at 17:10
- Third activity: For example, upgrade requires travelling; service window starts at 17:30 and ends at 18:00

Assume that the travel time between First activity and Third activity is 3 hours. The time line would be:

Time	Action
10:00	First activity is finished

Time	Action
10:00 to 14:20	Idle time
14:20 to 17:00	Travel toward third activity
17:00 to 17:10	Second activity (phone call)
17:10 to 17:30	Continue travel toward third activity
17:30	Third activity started without any overdue and as early as the service window allows

**Note:** When you place a non-travel activity manually on a time interval that is occupied by the travel bar of a non-movable (for example, due to service window) travel-required activity, the travel bar can be partially placed before the actual time. In this case, the best practice would be that you move the non-travel activity to another place in the route.

## Resources

Resources are the people who perform the activities and the items that are paired with those people. Examples of resources include technicians, tools, and trucks.

The Resources section describes some of the tasks that you can perform with resources. For the remaining tasks, see the Using Core Manage Cloud Service guide.

## Time Zone Settings

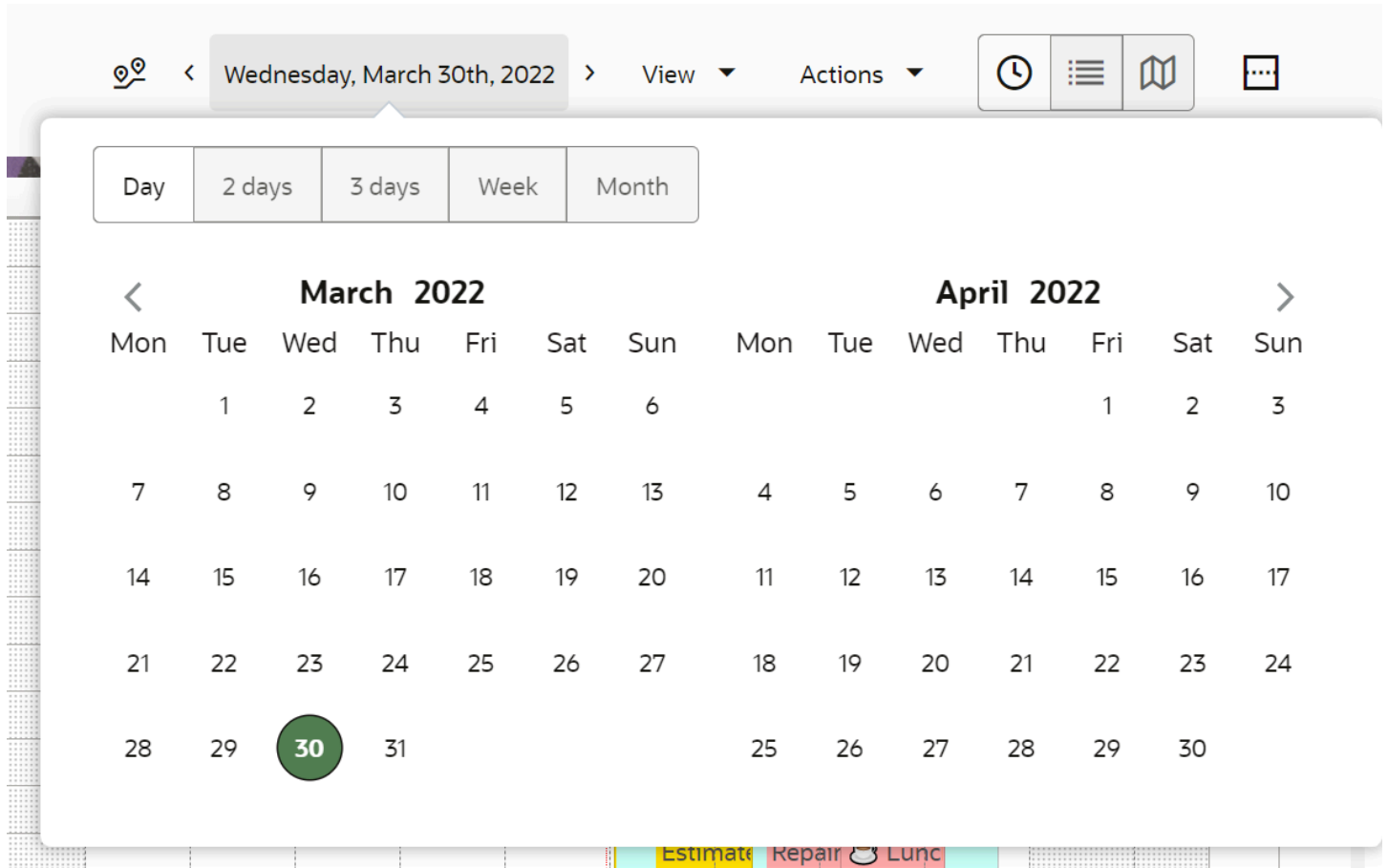
When you configure the application, it's possible to set different time zones for users and for resources. These time zones are used in different contexts on different pages. Here's an overview of how time zones are displayed throughout Oracle Field Service for technicians and dispatchers.

### Today's Date

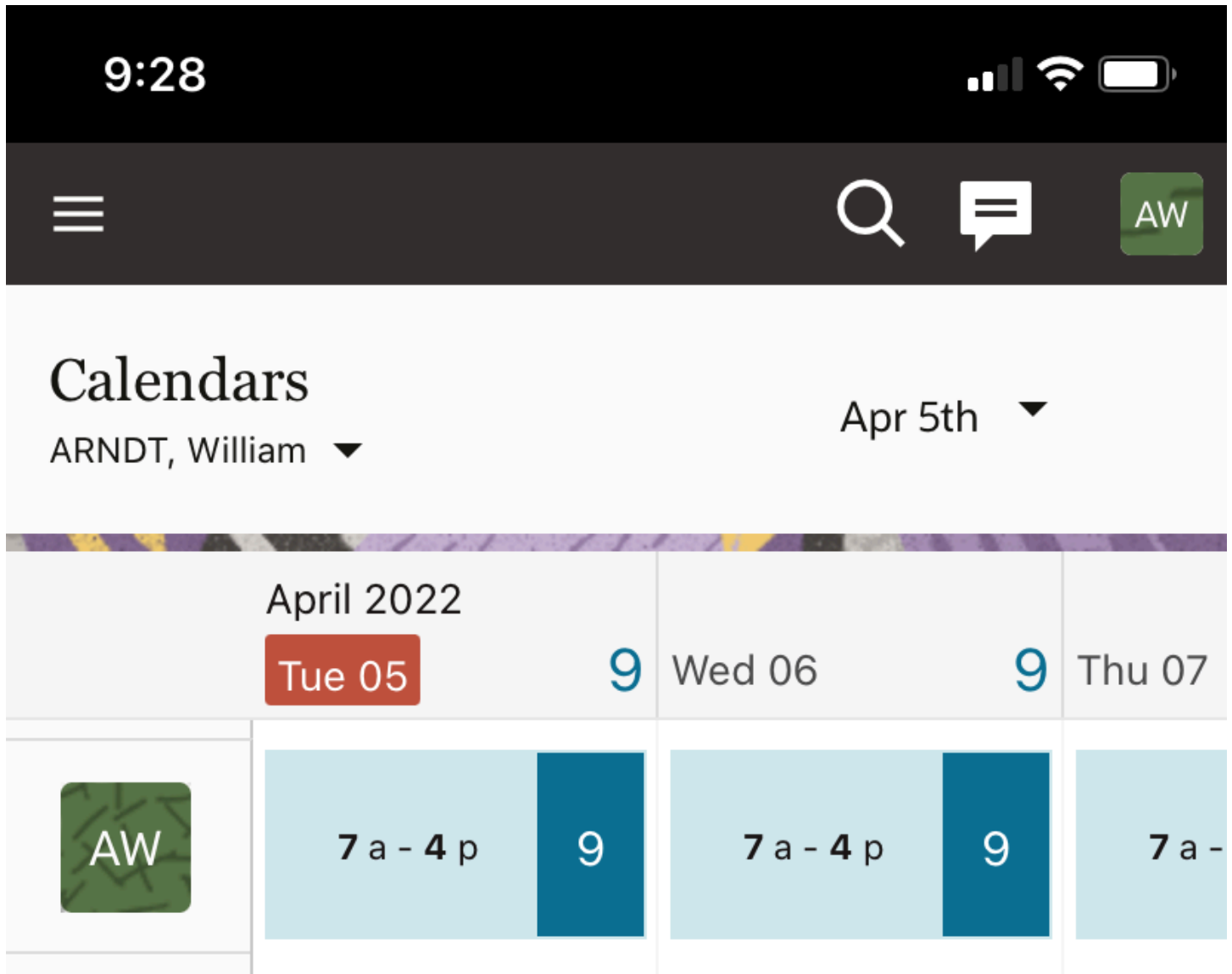
The time zone of the currently logged in user is used when determining today's date. Let's say it's 1:00 PM, Jun 10 in a UTC+00:00 time zone. If you sign in as a user who's in UTC+12:00 time zone, after logging in you see that the current date is set to Jun 11. This is because, in the user's time zone it's already 01:00 AM, Jun 11.

### Where is it Used?

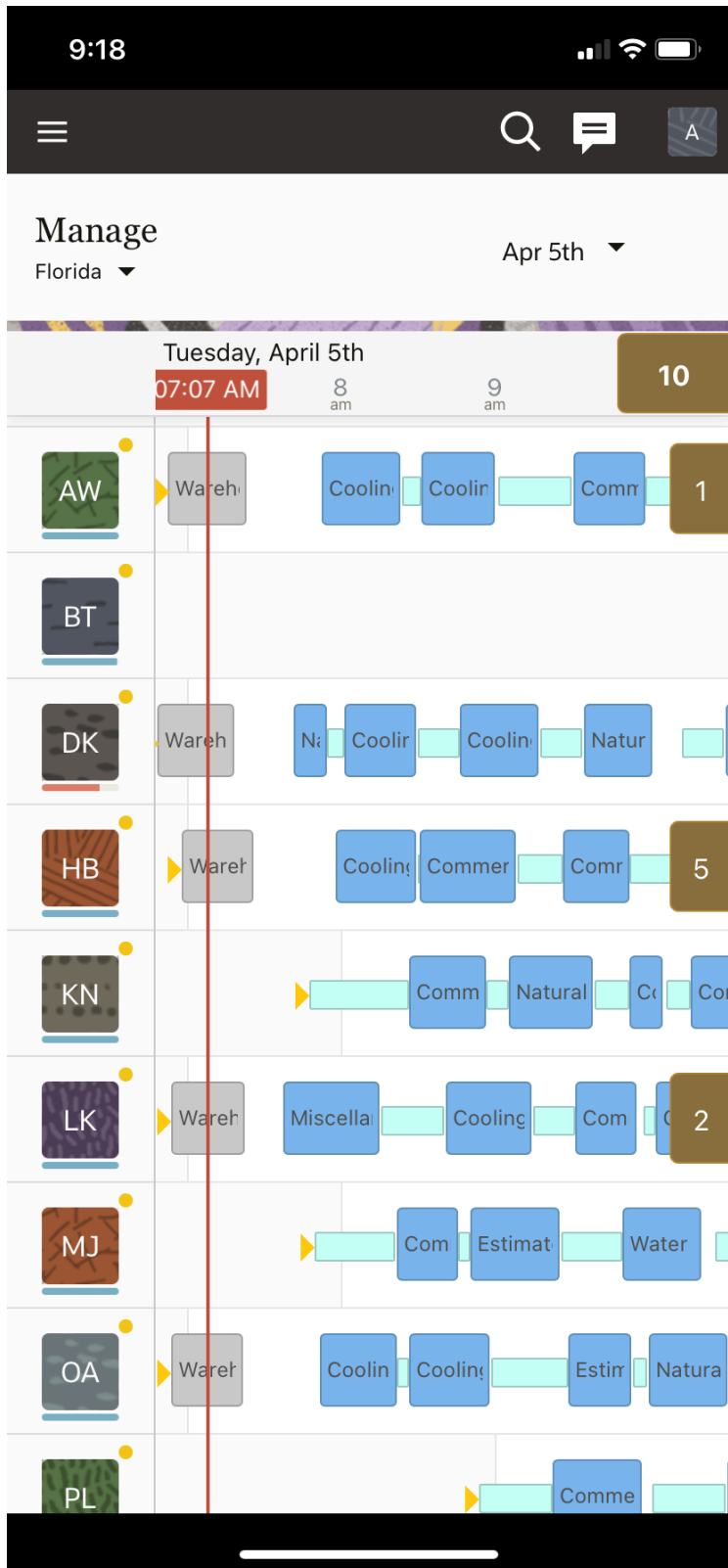
Today's date is used as the initial date on these pages in Oracle Field Service Core Application: Activities, Offline synchronization, Dashboard, and Print route. For example, on the "Activities" page, it is the date for which the activities are shown after you log in to the application. You can change the date on these pages to see the information for another date. Nevertheless, when you click the date field, the calendar widget shows you today's date in light blue color. This screenshot shows the calendar with the current date highlighted:



The same behavior is present in Oracle Field Service Mobile for Android and iOS. When a field resource logs in, today's date is marked with light red color on the date selection panel in the header, as shown in this screenshot:



When a field manager looks at the **Calendars** page in Oracle Field Service Mobile for Android and iOS, then today's date is marked in light red, as shown in this screenshot:





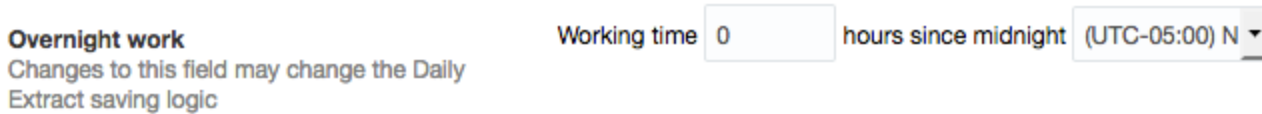
The same date is used in Oracle Field Service Core Application when searching for activities "starting today".

### Current Date of the Resource

The current date of the resource is always determined in the time zone of the resource. You can activate the route and start an activity only on the current date of the resource's time zone.

### Changing Past Activities

Every instance has a specific time when all the data that is related to the previous day is frozen and can't be changed any more. This time is configured in the **Overnight work** section on **Business Rules**, shown in this screenshot:



For example, you have configured that the working time is 5 hours since midnight in the Eastern time zone. This means that at 5:00 AM in the Eastern time zone all data for the previous day becomes frozen.

**Note:** If you configure an instance to use in several time zones, you must set the time zone on **Business Rules** to the most "western" time zone. If the work is performed several hours after midnight in this most "western" time zone, then you must also specify the number of hours after midnight.

### Time View in Oracle Field Service Core Application

Time view displays aggregated information for the hierarchy of resources. The information is presented in the same time zone to look consistent on the time line. The time zone is determined as the time zone of the resource selected in the resource tree on the left of the page. The current time, which is shown as a red vertical line is also in the time zone of the selected resource, shown in this screenshot:

Resources	6	06:59 AM	8	9	10	11	12	13	14	15	16	17	18	19		
ARNDT, William		War	Coo	Coo	Com	Wate	Comm	Lunc	Water	Water H	System	Comme				+1
BASILE, Terri								Nat	Lunc	Syster	Water H	Cooling				
BOVE, Leticia								Lunc					On-call			
DISNEY, Kathleen		War	N	Coo	Cool	Nat	Misc	Cool	Lunc	Natural	Water	Water				
HOLM, Billy		War	Cool	Comm	Com	Comm	Natu	Lunc	C	Loc	Miscella	Miscella	Miscella			+5
KILBURN, Norman				Com	Natu	C	Comm	Natu	Lunc	Estimate	Water H	Water H	Water H			
LYNCH, Kevin		War	Misce	Cool	Cor	Coo	Coo	Water	Lunc	Estima	Cooling	Water	Cooling			+2
MCGEE, Jeffery				Cor	Estin	Wate	Natu	Coo	Lunc	Cool	Cooling	Comm	Comm	Water		
ORDONEZ, Allison		War	Coo	Cool	Esti	Natt	Coo	Comm	Lunc	N	Comm	Estimate	Estimate			
PEAKE, Lynda					Com	Comm	Coo	Lunc	Natu	Miscel	Estima	Comme	Miscel			
PEARSON, Kay				Cor	Com	Com	Cool	Comm	Lunc	Cooling	Natural	Comme	System			
REINER, Fannie				Wate	Coo	Cor	Coo	Wate	Lu	Coolin	Miscel	Cooling	Comme			

**Note:** The only exceptions are the resource hint, activity hint, and activity label. Information on the resource hint is displayed in the time zone of the resource this hint belongs to. Information on the activity hint and activity label is displayed according to the rules described in the Activity related information section later in the topic.

## Manage page in Oracle Field Service Mobile for Android and iOS

The **Manage** page in Oracle Field Service Mobile for Android and iOS shows the information similar to the Time view. The difference is that there is no resource selected in the installed app. The information is shown for the list of resources identified as a group, and the group is configured by a user. Since it is not possible to identify which resource time zone must be used as the primary time zone, the time zone of the currently logged in user is used instead.

### Note:

- The only exceptions are the resource hint, activity hint, and activity label. Information on the resource hint displays in the time zone of the resource this hint belongs to. Information on the activity hint and activity label displays according to the rules described in the Activity related information section later in the topic.
- When a user opens the non-scheduled or non-ordered activities on the right of the page, the activity identifier shows information according to the rules described in the Activity related information section later in the topic.

## Organizations with Multiple Time Zones

If your organization operates in multiple time zones, it is important that you configure both, the field resource and activity time zones correctly. Configuring these time zones is even more important if they are different. A field resource sees all the data in their own time zone, but when the activity (customer) is in a different time zone, both times are shown as appropriate. The activity time zone is used for notifications and can be used in APIs (for example, for sending messages). Typically, the time zone of a physical location is used for notifications, but you may use your preferred time zone, such as your headquarters time zone or any other in which you prefer to get notifications.

### Resource related information

Information that is related to a resource and the resource's route is entered in the resource's time zone. It includes:

- Route Status (queue\_status), includes the time when the route was activated
- Reactivated (reactivated)
- Resource working hours (calendar)
- Resource on-call hours (oncall\_calendar)

Time view shows this information differently in Oracle Field Service Core Application and Oracle Field Service Mobile for Android and iOS. See the earlier sections for more details.

### Activity Related Information

Time related information on an activity is displayed and entered in the time zone of the resource for which the activity is assigned. This information includes:

- Start (ETA)
- End (end\_time)
- Start - End (eta\_end\_time)
- Delivery window (delivery\_window)
- Activity Time of Booking (atime\_of\_booking)
- Activity Time of Assignment (atime\_of\_assignment)

The only exceptions are:

- Time slot or service window (depending on what is used for the particular activity type)
- SLA window

These properties are either in the resource time zone or in the customer time zone. It depends on the **SLA and Service window use customer time zone** field set on the activity type. Time view shows this information differently in Oracle Field Service Core Application and Oracle Field Service Mobile for Android and iOS. See the earlier sections for more details.

### User related information

All user related information is shown in the time zone of the user. It includes:

- When the user was registered
- When the user was updated
- When the user logged in last time
- When the user changed the password
- Date and time till when the user is blocked

### Collaboration

Each message in Collaboration includes the time when it was sent. This time is shown in the time zone of the currently logged in user.

## How Self-Assignment Works

The **Self-Assignment** feature influences the availability of activities and resources for a user who is assigned to a bucket. By default, **Self-Assignment** is disabled. This setting is mostly used by dispatchers, who allocate activities to resources and usually do not perform any activities.

If a user is assigned to a bucket and **Self-Assignment** is cleared:

- All child resources of the bucket are available to the user.
- All activities in the bucket are available to the user (regardless of their work zones and work skills).
- The user can move all activities between all available resources (for example, from the bucket to any of the assigned resources, between resources, from a resource back to a bucket).
- **Self-Assignment** must be selected, if a technician is granted permission to assign tasks. (For example, the user is a crew chief, assigning activities to members of the crew, or a single technician allowed to choose activities to perform.)

If a user is assigned to a bucket and **Self-Assignment** is selected:

- Only the resources explicitly assigned to the user are available to such a user (for example, the bucket, the user themselves and members of the crew). No other child resources of the bucket are available to the user.
- Only those activities in the bucket that can be performed by at least one of available resources (subject to the work zone and work skill requirements) are available to the user.
- The user can move only the available activities and only between the available resources.

## How do I add an organization unit or a bucket to define the resource tree structure?

Use organization units to sort and organize the items in the resource tree. You can use buckets to hold the activities that aren't yet assigned to field resources. You must set up the resource tree using the organization, buckets, and child resources in a way that suits your business requirements.

**Difference between resource, user, and child resource:** A resource can be a field resource (a human being), a dispatcher, an administrator, a vehicle, or a tool. All resources are elements of the Resource tree. A user is a field resource or any other user that has access to Oracle Field Service. A child resource is a resource that is added to a bucket or an organization unit element of the resource tree. In the hierarchy of the resource tree, the bucket or the organization unit appears at a higher level than the child resource. A child resource can be a field resource (a human being), a vehicle, or a tool.

Organization units are typically used to group resources by location. Organization units cannot be route owners and you cannot assign activities to them. Buckets can have activities. However, dispatchers can assign activities to buckets manually and Routing can assign activities to buckets automatically. To add an organization unit or a bucket:

1. Click the navigation icon and then click **Resources**.
2. Click the plus icon.
3. Complete these fields:

Field name	Action
Resource Type	Select Group or Bucket. The fields on the page change based on the option you select.
Name	Enter the name of the organization unit or bucket the way you want it to appear in the resource tree.
External ID	Enter a unique ID for the organization unit or bucket. These IDs are optional.
Org Unit/Bucket	Select the organization unit or bucket under which you want to create the organization or bucket.
Status	Select whether the organization unit or bucket is active or inactive. An inactive organization unit or bucket is not listed in the resource tree.
Message Language	Select the language in which dispatchers and technicians see the error messages.
Time zone	Your (currently logged in user) time zone is populated, change it if required. This is the time zone in which the organization is located.
Time format	Your (currently logged in user) time format is populated, change it if required. This is the time format that your resources see and use in the interface. This can be either <b>12-hour</b> or <b>24-hour</b> .
Date format	Your (currently logged in user) date format is populated, change it if required. This is the date format that your resources see and use in the interface. This can be either <b>month-day-year</b> or <b>day-month-year</b> . The date format controls the display of dates in numeric format.

4. Click **Submit**.

The new active organization unit or bucket is added to the resource tree, in the selected hierarchy.

## Add a Dispatcher, an Administrator, or a Manager

You use the Add Resource page to add a dispatcher, a manager, or an administrator user. This is also the user without a resource; in other words, this user does not perform the duties of a field resource.

1. Click the hamburger icon and then click **Resources**.
2. Click the plus icon.  
The **Add Resource** page appears.
3. Complete these fields:

Field name	Action
Resource Type	Select Manager/Dispatcher/Admin. The fields on the page change based on the option you select.
Name	Enter the resource name the way you want it to appear in the resource tree.
Org Unit/Bucket	Click the field and select the organization unit or bucket with which you want to associate the resource. Let's say you want to add a dispatcher who manages a bucket and the resources under the bucket. Select the bucket to place the dispatcher so that the user can see only the bucket and the resources under that bucket. If you want to create a manager who may see the entire enterprise, select the parent level of the organization structure to add the manager. The options available for you are configured by your administrator. If you don't select any organization unit or bucket, the resource is treated as unassigned to any organization.
Status	Select whether the resource is active or inactive. Inactive resources cannot log in to the application.
User Type	Select the user type for the resource. The permissions assigned to the selected user type applies to this resource. In other words, the user type selected here determines the pages and the options the resource can see. You can create and edit resources of only the user types that are selected in the <b>Configuration &gt; User Types &gt; General Can create users of the following user types</b> section. The user types that are not selected on the <b>General</b> page are not available here for selection. Further, you cannot edit the details on the <b>Resource Info</b> page of the resources of this user type.
Visible resources	Select the resources the current resource can view, from the organization structure. The resource can see the resources belonging to the selected organization, organization unit, or bucket.
Self assignment	If you are assigning this resource to a bucket, select this check box to determine the availability of activities and resources for this resource. For more information, see the How Self-Assignment Works topic.
Login	Enter the user name with which the resource can log in to Oracle Field Service.  <b>Note:</b> Although you can change a user's Login (user name) after it is created, it is not advisable to do so. This is because, it may cause issues with integrations with other Oracle applications such as, DBaaS or Oracle Analytics Cloud, where this field is used as a primary key on some tables.
Password, Confirm Password	Enter the password that you want to set for the resource.
Force password change at next login	Select this check box, if you want the resource to change their password when they log in for the first time.
Collaboration group	Click and select the collaboration group that you want to add the resource to.
Message Language	Select the language in which you want the resource to see the error messages.

Field name	Action
Time zone	Your (currently logged in user) time zone is populated, change it if required. This is the time zone that the resource sees and uses in the interface.
Time format	Your (currently logged in user) time format is populated, change it if required. This is the time format that the resource sees and uses in the interface. This can be either <b>12-hour</b> or <b>24-hour</b> .
Date format	Your (currently logged in user) date format is populated, change it if required. This is the date format that the resource sees and uses in the interface. This can be either <b>month-day-year</b> or <b>day-month-year</b> . The date format controls the display of dates in numeric format.
Long date format	Select the long date format that the resource views in the application. A long date is a date that includes words. For example, Wednesday, May 6, 2020.

4. Click **Submit**.

The new resource is added. If you have configured the Refresh Rate (refresh\_rate) field for the user, it will not be used in Core Application.

## How do I add a resource?

The field resource is an individual associated with the user who performs an activity or a tool or vehicle that belongs to an organization or resource.

1. Log in to the Core application as an admin user.
2. Click the **hamburger** icon and then click **Resources**.
3. Click the Plus icon.  
The **Add Resource** page displays.
4. Complete the following fields:

Field	Mandatory	Description
Resource type	Yes	Select one of the following resource type that is configured for your organization: <ul style="list-style-type: none"> <li>○ Bucket</li> <li>○ Organization Unit</li> <li>○ Technician</li> <li>○ Truck</li> <li>○ Manager/Admin/Dispatcher</li> </ul> <p><b>Note:</b> The fields on the page change based on the selected resource type.</p>
Type	Yes	Select whether the technician is a Contractor or an In-House employee. <b>Note:</b> This field displays only for the technician resource type.
Name	Yes	Enter the resource name that you want to display in the resource tree.

Field	Mandatory	Description
External ID	No	Enter the ID number from an external system, such as the employee ID number. If you use them, each resource must have a unique ID.
Org Unit/Bucket	Yes	If you are adding a bucket, organization unit, or a technician, select the organization or organization unit to which the resource belongs.  <b>Note:</b> The field is not mandatory for the Manager/Admin/Dispatcher resource type.
Status	Yes	Select <b>Active</b> if you want the resource to use the application. Else, select <b>Inactive</b> .
<b>Access Settings</b> (applicable only for the Technician and Manager/Admin/Dispatcher resource type)		
User Type	Yes	Select the user type for the resource. You can create and edit resources of only the user types that are selected in the <b>Configuration &gt; User Types &gt; General Can create users of the following user types</b> section. The user types that are not selected on the <b>General</b> page are not available here for selection. Further, you cannot edit the details on the <b>Resource Info</b> page of the resources of this user type.
Visible Resources	Yes for the Manager/Admin/Dispatcher resource type.	Select the organization, organization unit, or the bucket to which the resource belongs.
Self Assignment		The <b>Self-Assignment</b> feature influences the availability of activities and resources for a user who is assigned to a bucket. By default, <b>Self-Assignment</b> is disabled. This setting is mostly used by dispatchers, who allocate activities to resources and usually do not perform any activities.  If a user is assigned to a bucket and <b>Self-Assignment</b> is cleared: <ul style="list-style-type: none"> <li>All child resources of the bucket are available to the user.</li> <li>All activities in the bucket are available to the user (regardless of their work zones and work skills).</li> <li>The user can move all activities between all available resources (for example, from the bucket to any of the assigned resources, between resources, from a resource back to a bucket).</li> <li><b>Self-Assignment</b> must be selected, if a technician is granted permission to assign tasks. (For example, the user is a crew chief, assigning activities to members of the crew, or a single technician allowed to choose activities to perform.)</li> </ul> If a user is assigned to a bucket and <b>Self-Assignment</b> is selected: <ul style="list-style-type: none"> <li>Only the resources explicitly assigned to the user are available to such a user (for example, the bucket, the user themselves and members of the crew). No other child resources of the bucket are available to the user.</li> <li>Only those activities in the bucket that can be performed by at least one of available resources (subject to the work zone and work skill requirements) are available to the user.</li> <li>The user can move only the available activities and only between the available resources.</li> </ul>
Login	Yes	Enter the login name for the resource.
Password, Confirm Password	No	Enter the password that you would like to set for the resource.
Force Password Change at Next Login	No	Select the check box, if you want the resource to change their password when they log in for the first time.
Collaboration Group		Select the collaboration groups. See Create a Group or Help Desk section in the <i>Administering Oracle Field Service Guide</i> .

Field	Mandatory	Description
Refresh Rate	No	Enter the duration within which you want the dashboard charts to be refreshed automatically. This auto-refresh applies only to the dashboard charts and not other parts of the application. This field is shown on the <b>Add Resource</b> page, only if your administrator has added it.
Initial Ratio for Resource Value		See <a href="#">How do I set the initial ratio for activity duration?</a> <b>Note:</b> If you select a resource from the Home page, navigate to the <b>Resource Info</b> page, and click Information, then the Initial ratio for Activity duration and Default ratio for Activity duration values are displayed on the <b>Edit Resource</b> page.
<b>Locale Settings</b>		
Message Language	Yes	Select the language in which the resource sees the error messages.
Time Zone	Yes	Select the time zone that the resource views in the application.
Time Format	Yes	Select the time format (12-hour or 24-hour) that the resource views in the application.
Date Format	Yes	Select the date format that the resource views in the application.
Long Date Format	Yes	Select the long date format that the resource views in the application. A long date is a date that includes words. For example, Wednesday, May 6, 2020. <b>Note:</b> The field displays only for the Technician and Manager/Admin/Dispatcher resource type.

5. Click **Submit**.

## Set the Initial Ratio for Resource Value

The **Initial ratio for Activity duration** field indicates the percentage by which the company-wide estimations of the activity duration is multiplied to get the estimated activity duration at the resource level for the new activities. This ratio is applicable only for those activities that are relatively new to the resource with no significant past data. You can edit this field only if the resource doesn't have any completed activities.

**Note:** The field is displayed only for field resource, tool, and vehicle resource types.

1. Log in to the Core application as an admin user.
2. Navigate to **Configuration, User Types** page.
3. Select the **Screen Configuration** tab.
4. Add the **Initial ratio for Activity duration** field to the Edit Resource/User context layout and set RW visibility.
5. Click **Save**.
6. Navigate to the Add or Edit Resource page.

**Note:** Based on the settings in **Configuration, Statistics**, the fields, **Lower limit for personal ratio to calculate duration, %** and **Upper limit for personal ratio to calculate duration, %** are displayed.

7. Set an appropriate value for the **Initial ratio for Activity duration** field.  
For example, select 120%. You can view the value on the Resource Edit and Resource Hint pages. The **Default ratio for Activity duration** field is displayed as read-only under the **Initial ratio for Activity duration** field based on the reported duration after the field resource completes at least one activity.



The Default ratio for Activity duration value is always displayed as Read-Only value and only if the Initial ratio for Activity duration value is displayed. The message below the **Initial ratio for Activity duration** drop-down list enables you to understand how the Initial ratio for Activity duration value impacts the resource.

If the Initial ratio for Activity duration value of the resource differs from one of the predefined options, the current value is added to the bottom of the list. The initial ratio for Activity duration value set through the API is converted to percentages. For example, if you use the API and set the value to "1.25", then on the Resource Edit page and Resource Hint, the value is shown as "125%".

8. Click **Submit**.

## Assign Work Skills to a Resource

Work skills are the competencies that each resource is qualified to perform. A resource without work skills is not considered for activity assignments. You can assign *work skills* to resources through the **Resource Info** page.

1. In the resource tree, click on the group or bucket that you want to add the new resource to.
2. Click **Settings > Resource Info** from the drop-down list.

The **Resource Info** page displays.

3. Click the plus icon in the **Work skills** field.

The **Add work skills** window opens.

4. Assign a preference level for each work skill using a scale of 1 to 100.

A higher number means that the resource has a higher chance of being allocated the task. If a resource performs this task only occasionally, enter a lower number.

5. Click **Save**.

The resource is now assigned the skills and will be considered for work only if their qualification level meets or exceeds the level in the activity record. These guidelines are applicable:

- If no individual skills are defined for a resource, then the application interprets that the resource is qualified to perform all of the skills at the highest qualification level. This is the default setting.
- When qualification levels are set for at least one work skill, then the resource is considered to have only that specific skill. The resource is not considered for work requiring any of the other skills.
- A higher ratio number increases the likelihood that this resource will be assigned activities with this work skill. If the ratios are conflicting, the application uses the higher ratio. If the work skill group ratio conflicts with the individual work skill ratio, the application uses the individual work skill ratio.

## Add a Work Zone to a Resource

Work zones define the regional areas in which resources are allowed to work. You can add a work zone that the resource uses only on weekdays, a work zone only for weekends, or a temporary work zone which is assigned for a short period. When you add a work zone to a resource, any work zone shape or custom map layer that's added to the work zone is displayed on the map. Work zone shapes and custom map layers help you visualize your work area better.

If you don't assign a work zone either to a resource or to any of its parents, the application considers that the resource has no work zones and is thus incompatible with all activities.

1. Open the **Resource Info** page for a resource.

When a resource doesn't have any work zones assigned directly, but inherits work zones from one of its parent entities, then the message, "Applied from <bucket\_name>" appears on the Work Zones tile, where <bucket\_name> is the parent resource. When a resource has been assigned with several work zones, then the Map isn't shown on the tile. Instead, a list of up to 10 assigned work zones appears.

2. Click the title of the Work Zones tile.

When resources have work zones added but shapes aren't populated, or no work zones are added either for the resource AND all its parents, then the map on the **Resource Work Zones** page doesn't display. Only the list of work zones is displayed in full-screen mode. After you add new work zones that have shapes, the page is refreshed and the map is displayed. When a resource doesn't have any directly-assigned work zones, then a search field is displayed and the message, "No work zones are added for the resource. Work zones are applied from <bucket\_name>" is displayed where <bucket\_name> is the parent resource.

3. On the **Resource Work Zones** page, click the plus icon.

The **Add Work Zones** dialog box appears.

4. Complete these fields:

Field	Description
Work zone	Select one or more work zones from the drop-down list. The <b>Default Work Zones</b> section contains active work zones that are added to the resource's bucket or organization unit. When the bucket or organization unit isn't assigned to a work zone, then the work zones of its parent are considered.  The <b>Other Work Zones</b> section contains other active work zones that aren't considered as default.
Ratio	Type a value between 1 and 100. A higher number increases the likelihood that this resource is assigned activities in this work zone. If this is a work zone the resource works in daily, or if it's a preferred zone for the resource, enter a higher number. If this resource works in this work zone occasionally or only by exception, enter a lower number. You can assign multiple work zones with different ratios to one resource.
Temporary	Select this check box to assign a temporary work zone for a specified period of time.
Start date	Enter the date that this work zone assignment starts.
End date	[Optional] If this is a temporary assignment, enter the date that this work zone assignment ends.
Recurrence	Set the schedule for the work zone if the resource is alternating between work zone assignments. Resources can cover different work zones on different days of the week. Use this feature to change a resource's work area on certain days of the week. Select the frequency of recurrence and the days on which to recur.
Days between occurrences	Enter the number of days after which the assignment repeats. If you've selected Repeat Weekly in the earlier field, select the days of the week on which the assignment repeats.

5. Click **Submit**.

The work zone is added to the resource. If any work zone shapes are added to this work zone, they're displayed on the map.

## Add a Resource Location

A resource location denotes the location at which the resource works or resides. You can configure multiple locations, for example, to indicate the resource's start and end locations.

1. Log in to .
2. Open the **Resource Info** page for the resource for which you want to set the location.
3. Click **Locations**.  
The **Locations** page is displayed for the selected resource. This page displays the existing locations for this resource, and the locations that are inherited by the resource based on its organizational hierarchy.
4. Click the plus sign in the **Resource Locations** section.
5. In the **Label** field, add a label for the location.
6. In the Address field, add the address.  
The address is resolved and the location is displayed on the map.
7. If you want to locate the address manually, click **Locate Manually** and fill up these fields:

Field Name	Action
Address	Enter the address of the location.
City	Enter the city in which the address is located.
Country	Enter the country in which the address is located.
ZIP/Postal Code	Enter the zip or postal code of the location.
State	Enter the state in which the address is located.
Latitude/Longitude	Enter the coordinates of the address.

8. Enter the values for the custom travel keys, if any.  
You can use this field if you have created custom activity properties on the resource location to store the travel key to use with the 'Calculate travel' feature.
9. Click **Submit**.  
The location is added to the **Resource Locations** list on the **Locations** page.

## Manage Resource Locations

A resource location denotes the location at which the resource works. You can configure multiple locations and indicate the day on which the resource operates from a location. If you have configured a Group Location, it is available under the **Shared Locations** column on the **Locations** screen. You can manage locations from Oracle Field Service Mobile for Android and iOS as well.

To add, modify, or delete a resource location:

1. Log in to Oracle Field Service Core Manage Service.
2. Select the field resource for which you want to set the location in the resource tree.
3. Click **Resource Settings > Locations**.  
The **Locations** screen is displayed for the selected resource. This screen displays the existing locations for this resource, and the locations that are inherited by the resource based on its organizational hierarchy.
4. Click **Add location**.  
The **Add location** dialog appears.

5. Fill up these fields:

Field Name	Description
Label	A unique label for the location you are adding.
Address	Address of the location.
City	City in which the address is located.
Country	Country in which the address is located.
ZIP/Postal Code	Zip or postal code of the location.
State	State in which the address is located.

6. Click **Resolve address**.

The address is resolved and the **Latitude** and **Longitude** fields are filled up.

7. Click **OK**.

The location is added to the **Resource Locations** list on the **Locations** screen.

8. Optionally, if you have added a Group Location, drag and drop it on the day of the week on which the resource wants to work from that location.

9. To modify a location, click the location in the **Resource Locations** list. Click **Modify** in the hint pop-up. The **Edit location** dialog appears.

10. Modify as required and click **OK**.

11. To delete a location, click the location in the **Resource Locations** list. Click **Delete** in the hint pop-up. The location is deleted.

## Manage Shared Locations

A Shared Location is configured at the bucket level and is available for assignment to any child resource.

1. Log in to Oracle Field Service Core Application.

2. In the resource tree, select the bucket or organization for which you want to set the location.

3. Click **Resource Settings > Locations**.

The **Locations** screen is displayed for the selected resource. This screen displays the existing locations for this resource, and the locations that are inherited by the resource based on its organizational hierarchy.

4. Click **Add location**.

The **Add location** dialog appears.

5. Complete these fields:

Field Name	Description
Label	A unique label for the location you are adding.
Address	Address of the location.
City	City in which the address is located.

Field Name	Description
Country	Country in which the address is located.
ZIP/Postal Code	Zip or postal code of the location.
State	State in which the address is located.

6. Click **Resolve address**.  
The address is resolved and the **Latitude** and **Longitude** fields are filled up.
7. Click **OK**.  
The location is added to the **Group Locations** list on the **Locations** screen.
8. To modify a Shared Location, click the location in the **Group Locations** list. Click **Modify** in the hint pop-up.  
The **Edit location** dialog appears.
9. Modify as required and click **OK**.  
The changes are applied to all the users assigned to this location.
10. To delete a location, click the location in the **Resource Locations** list. Click **Delete** in the hint pop-up.  
The location is deleted.

## Rules to Determine Resource Location

When a resource is in the field, the application sends the GPS coordinates of the resource to the routing engine, if they are available. This helps Routing determine the location of the resource.

These rules are used:

Activity Status	Scenario	Coordinates Sent
Route is not yet started or no activity is started on the route	The resource's GPS coordinates are obtained between 0–20 minutes.	The GPS coordinates are used.
	No GPS coordinates are available, or GPS coordinates are greater than 20 minutes.	The resource's Start Location is used if it is available.
	No GPS coordinates are available, or GPS coordinates are greater than 20 minutes, and no Start Location is assigned to the resource.	The resource's location remains undefined.
Route has a started or a completed activity	The resource's GPS coordinates are newer than the address of the started or completed activity and the resource is at a distance more than 20 minutes from the address of the started or completed activity (using airline distance and default company airline distance speed).	The GPS coordinates are used.
	No GPS coordinates are available, or GPS coordinates are older than the address of the started or completed activity, or the resource is at a distance less than 20 minutes from the address	The address of the started or completed activity is used.

Activity Status	Scenario	Coordinates Sent
	of the started or completed activity (using airline distance and default company airline distance speed).	

## View Resources

Use the **Resources** page to get a bird’s eye view of an organization. You can see your organization’s business units, human beings, tools, and vehicles on the **Resources** page.

1. Click the hamburger icon and click **Resources**.  
The Resources page appears, as shown in this screenshot:

The screenshot displays the 'Resources' page with the following data:

External ID	Status	Resource type	Login	User Type	Phone
55001	Active	Technician	walter.ambriz	Technician	555005500100
33001	Active	Technician	william.amdt	Technician	555003300100
33035	Active	Technician	terri.basile	Technician	555003303500
670301	Active	Technician	Fred Benson	Technician	555003304500
33008	Active	Technician	leticia.bove	Technician	555003300800
Derek Christie	Active	Technician	Derek Christie	Technician	555001100000
100000490999044	Active	Technician	chris.conner	Technician	555003303500

2. To view all the resources and the count of each resource in your organization:
  - a. Click the drop-down list in the **Organization** section and select your organization.
  - b. Select the **Unassigned** option to view all users who don’t belong to any organization or a bucket.  
**Note:** Only users who have access to the entire resource tree can view unassigned users.
  - c. Click **Change** in the **Org Unit/Bucket** section and select **All**.  
All the resources in all the organization units and buckets are displayed in alphabetical order and the count of each type of resource is shown in the **Resource Type** section.
3. To view the resources in a specific organization unit or bucket:
  - a. Click **Change** in the **Org Unit/Bucket** section and select the required organization unit or bucket in the **Organization Units Selection** dialog box, as shown in this screenshot:

✕
Organization Units Selection

✕

All

24/7 Connect (Contractors, FL) FL, USA

24/7 Connect (Contractors, FL) Newfoundland

FL, USA Sunrise Enterprise

3 of 71 found resources are shown. Please refine your search.

Show selected only

Dismiss
Apply

All the resources in the selected organization unit or bucket are displayed in alphabetical order and the count of each type of resource is shown in the **Resource Type** section.

4. To view a specific type of resource:
  - a. Click **Change** in the **Org Unit/Bucket** section and select the organization unit or bucket in which you want to see the specific types of resources.
  - b. Select the required check box in the **Resource Type** section.  
The resources of the selected type display in alphabetical order and the count of active resources is updated in the **Status** section.

## Filter and Search for Resources

When you view the resources at an organization unit or a bucket level, you can filter and search for specific resources. This helps you perform further actions such as activate, deactivate, add to a collaboration group, unblock, and set a user type on the resources.

1. Click the hamburger icon and then click **Resources**.
2. To filter the resources by User Type or Resource Type, select the User Type or Resource Type check box.
3. To search for resources on their login ID, type the login ID in the search field.

4. To set the user type for multiple resources:
  - a. Filter the resources per step 3 or 4 and then select the check boxes for the required resources.
  - b. Click **Set User Type** and then select the user type that you want to assign to all the selected resources. Click **Apply**.

The **Set User Type** group action is displayed here only if the administrator has added it to the **Resources** context layout structure. Be aware that when you change the user type of a user, the pages the user can view and the permissions on those pages may be different.

## Navigating Back

When you can navigate to a page from many different pages, the Back link displays the specific page that you navigated from. For example, you can go to **Resource Info** from **Dispatch Console**, **Manage**, or **Resources**. So, the Back link on **Resource Info** takes you to the specific page where you navigated from.

When you access a resource page from a page that does not have the main header, the main header is not displayed on the resource page as well. For example, if you go to **Resource Calendar** from a resource's **Route** or **Activity List** page, the main header is not displayed. The originating page remains unchanged in these cases. The **Add resource**, **Edit resource**, and **Inventory list** pages are always displayed using their existing headers.

On devices with smaller screens, the name of the page is displayed without the name of the previous page. The Back link works the same way it works on larger screens.

## Search for a Work Zone

When a resource is assigned to several work zones, you can search through the work zones on the Resource Work Zones page.

1. Open the **Resource Info** page from the **Manage**, **Dispatch Console**, or **Resources** page.
2. Click the stack icon and then click **Work Zones**.
3. In the **Search** box, enter the work zone you want to search for.

The list of matching work zones display. This list shows the temporary work zones with a calendar icon and the recurrence details below the assignment dates. The work zone recurrence details are displayed as given in this table:

Repeat	Conditions	Message
Daily	Days between occurrences = 1	No message displayed
Daily	Days between occurrences = 3	Repeat every 3 days
Weekly on Mon, Tue, Wed, Fri	Weeks between occurrences = 1	Repeat every week on Mon-Wed, Fri
Weekly on Mon, Tue, Wed, Fri	Weeks between occurrences = 2	Repeat every 2 weeks on Mon-Wed, Fri



## What details can I see on the Resource History page?

Oracle Field Service saves the history of the changes made to resources, such as a change in the location or work zone. You can view, filter, sort, and export the list of such changes.

1. Open the **Resource Info** page from the **Manage, Dispatch Console**, or **Resources** page.
2. Click **Resource History**.  
The **Resource History** page displays the **Action, Value, Action Time**, and **User** columns.
3. Click the **Action, Action Time**, or **User** column to filter and sort the history.
4. Click **Export** to export the history to a comma separated value (.CSV) file.

## Change the Resource Type of a Field Resource

Sometimes, you may have to change a field resource to a dispatcher or manager. When you do this, the resource becomes inactive and a user is created.

1. Click the hamburger icon and then click **Resources**.
2. Type the resource name for which you want to change the Resource Type in the **Search** field.  
The matching results appear.
3. Click the required resource name.  
The **Resource Info** page appears, with all the details of the resource.
4. Click the stack icon and then click **Edit**.  
The **Edit Resource** page appears.
5. In the **Resource Type** field, select Manager/Dispatcher/Admin.
6. Click **Submit**.  
The resource becomes inactive, and a user is created.

## Change the Resource Type of a Manager, a Dispatcher, or an Administrator

Sometimes, you may have to change a Manager, a Dispatcher, or an Administrator to a field resource. When you do this, the field resource is created and the Manager, Dispatcher, or Administrator is not available anymore.

1. Click the hamburger icon and then click **Resources**.
2. Type the resource name for which you want to change the Resource Type in the **Search** field.
3. In the search results, click the required resource name.
4. On the **Resource Info** page, click the stack icon and then click **Edit**.
5. In the **Resource Type** field, select a field resource.
6. Click **Submit**.  
The field resource is created and the Manager, Dispatcher, or Administrator is not available anymore on the **Resources** page.

## Move a Resource

Sometimes, you may have to move a resource from one organization unit or bucket to another. You can move only the resources that are at the organization unit or bucket level. Use the **Edit Resource** page to implement this change.

1. Click the hamburger icon and then click **Resources**.
2. Type the name of the resource that you want to move, in the **Search** field.  
The matching results appear.
3. Click the required resource name.
4. On the **Resource Info** page, click the stack icon and then click **Edit**  
The **Edit Resource** page appears.
5. Click the **Org Unit/Bucket** field.  
The **Org Unit/Bucket** dialog box appears.
6. Search for and select the organization unit or bucket to which you want to move the resource.
7. Click **Select**.
8. Click **Submit**.  
The resource type is moved to the new organization unit or bucket in the resource tree.

## Change the Visible Resources

You can use the **Visible Resources** field to define which resources the current user can view. You define visible resources by selecting an organization, an organization unit, or a bucket.

1. Click the hamburger icon and then click **Resources**.
2. Type the resource name for which you want to change the visible resources in the **Search** field.  
The matching results appear.
3. Click the required resource name.
4. On the **Resource Info** page, click the stack icon and then click **Edit**.  
The **Edit Resource** page appears with all the details of the resource.
5. In the **Visible resources** field, select an organization, an organization unit, or a bucket.  
The **Visible resources** field is available only if you have the visibility set as R/W for your user type on the **Resource/ User Edit** context layout. Further, you can only select from an organization, an organization unit, or a bucket to which you belong.
6. Click **Submit**.  
The selected user can see the resources belonging to the selected organization, organization unit, or bucket.

## Modify Multiple Resources Simultaneously

You can perform actions such as activate, deactivate, unlock, or delete, on multiple resources simultaneously.

1. Go to the **Resources** page.

2. Filter the list to view the resources of your choice.

Some of the filter options are Collaboration users and Last login.

3. Select or tap and hold [on a mobile device] all the resources that you want to modify.

The options **Activate**, **Deactivate**, **Delete**, **Set Collaboration Group**, and **Unlock** are displayed at the top of the list. This screenshot shows the desktop version of the **Resources** page:

The screenshot shows the 'Resources' page with the following filters and table data:

**Filters:**

- Organization: All Organizations
- Org Unit/Bucket: All Org Units/Buckets
- Resource Type:
  - Technician (36)
  - Manager/Dispatcher/Ad... (+27)
  - Contractor (+12)

**Resource Table:**

Resource ID	Name	Location	External ID	Status	Resource type	Login	User Type	Phone
<input checked="" type="checkbox"/> AJ	Alex Johnson (TL)	X756 Commercial HVAC	Alex Johnson	Active	Technician	Alex Johnson	Technician	555001100000
<input checked="" type="checkbox"/> AW	AMBRIZ, Walter	CA, USA	55001	Active	Technician	walter.ambriz	Technician	555005500100
<input checked="" type="checkbox"/> AW	ARNDT, William	FL, USA	33001	Active	Technician	william.arndt	Technician	555003300100
<input type="checkbox"/> BT	BASILE, Terri	FL, USA	33035	Active	Technician	terri.basile	Technician	555003303500
<input type="checkbox"/> BL	BOVE, Leticia	FL, USA	33008	Active	Technician	leticia.bove	Technician	555003300800

4. Click the button of your choice.

A confirmation dialog appears with the count of resources selected for the action.

5. Confirm your decision.

## Assign a Schedule to a Resource

The supervisor can update a resource’s calendar and the changes are visible with immediate effect.

However, the supervisor is notified about the resource’s task allotment status when the calendar is updated. You can access and update the resource’s calendar from these locations.

- Calendar icon present on the **Home** page (if configured on the layout)
- Calendar icon present in the hamburger menu (if added on the **Main menu** context layout)
- From the **Resource Info** page, using the Resource Calendar option (if added on the Resource/User Info layout)

### Assigning a Schedule

You can assign a schedule that exists in the application to a resource.

1. From the Resource Calendar, select a date for which you want to assign a schedule.
2. From the Schedule drop-down list, select the Schedule that you want to assign to the resource.

3. From the Calendar option, select the date on which you want to end the new schedule.

**Note:** If you don't specify any end date, the schedule is considered as indefinite.

4. Click **Submit**. The new schedule is applied to the resource.

KILBURN, Norman, 06/12/18

Schedule: 7 to 4

End Date: 06/14/18

Schedule "7 to 4" will be applied for 06/12/18 - 06/14/18

On-Call Dismiss Submit

## What to do next

### Non-Working Time Option

You can schedule an activity under the Non-Working Time category, if a technician needs a day off, because of reasons such as vacation or illness. However, you cannot apply non-working time if the technician has activities other than repeating, shift, or mass type activities assigned for the day. A warning message appears on the dialog box, and if you click **Confirm**, then the non-working time is applied regardless of the resource's schedule.

BOVE, Leticia, 06/08/18

Schedule: Non-Working Time

\* Reason: Illness

\* Repeat for: 1 Days

Resource with pending activities should not be set non-working or inactive

On-Call Dismiss Confirm

## Favorite Group of Resources

Use the **Favorites** option to get quick access to the most frequently used resources such as Bucket, Field Resource, Organization unit, Tool, or Vehicle. You can create as many Favorite groups as required.

When a user adds a resource to a Favorite group, the star is filled. Favorite groups are shown at the top of the resource tree and are saved for a specific user (not a company level configuration).

The favorites group has these characteristics:

- You can view only the Favorites group in the resource tree.
- All warnings shown on the resource icon and resource hint in the resource tree are supported for Favorite resources.
- Actions available in the main resource tree such as drag-and-drop and filter are supported for the Favorites group as well.
- When searched for a resource, Favorites and the main resource tree resources are searched.
- When searched by activity, the main resource tree resource is considered, and the Favorites group is avoided.
- Favorites are available on these pages in the interface:
  - Activities
  - Daily
  - Dashboard
  - Reports
  - Resource info
  - Resource calendars
  - Inventories
  - Locations
  - Resource work zones
  - Users
- Favorites are not available on these pages:
  - Quota
  - Forecasting
  - Routing

## Create a Favorite Group of Resources

Dispatchers can pick resources from the main resource tree and group them to have quick access to them. Groups such as this helps you avoid scrolling up-down the resource tree to find a required bucket or technician. You can create as many groups as required and manage the resources using the main resource tree.

**Note:** This operation can be performed in Oracle Field Service Core Application only. You can add organization units, buckets, or individual resources to a group. When adding an organization unit or a bucket, note that the OrgUnit/Buckets is a dynamic entity. This means that the child resources within this group may change over time, and these changes show in your group content. Therefore, if you want to have specific resources in your managed group, assign those resources individually. Selecting a group resource automatically selects all its child resources.

1. Determine the resource that you want to be in a new group.
2. Open the resource hint.
3. Click the star icon.
4. On the **Favorite Groups** dialog box, click **New group** and enter the name of a group.

## Favorite Groups

Resource "xAssistant" is present in the following groups:

- Florida
- Favorites
- Southern MD
- Nearby
- South Florida

New group

Dismiss

Submit

**5.** Click **Submit**.

When you add a resource to a group, the star icon on the resource hint is filled.

### Add a Resource to an Existing Favorite Group

When you start managing new resources, you can add them to the existing favorite groups.

1. Determine the resource that you want to be in a new group.  
When adding an organization unit or a bucket, note that the OrgUnit/Buckets is a dynamic entity. This means that the child resources within this group may change over time, and these changes show in your group content. Therefore, if you want to have specific resources in your managed group, assign those resources individually. Selecting a group resource automatically selects all its child resources.
2. Open the Resource Hint.
3. Click the star icon.
4. Select an appropriate group and click **Save**.  
The star icon for the resource is filled.
5. To go to a child resource of an Organization Unit, a Bucket, or a Group, click the arrow in front of the resource.
6. To go to a parent resource, click the arrow before a resource (one level up). Or, click the 'organization' icon to jump to the root level in the resource tree.

## Edit a Favorite Group

You can edit a favorite group to rename, remove, view temporarily assigned resources, or add a filter to it.

1. To rename a group:
  - a. Click the star icon next to the group name.
  - b. Click Edit group.
  - c. Change the name in the **Group name** field.
  - d. Click **Submit**.
2. To view the temporarily assigned resources in the group:
  - a. Make sure you have selected the organization unit or bucket for which you want to view temporarily assigned resources.
  - b. Select the **Show temporarily assigned resources** check box.
  - c. Click **Submit**. When you select this group in the resource tree, all the resources of the selected organization unit or bucket, including resources that are assigned temporarily are displayed. Further, temporarily assigned resources are displayed in this favorite group only for the duration for which they are assigned.
3. To select a filter that applies to the group:
  - a. Ensure that your administrator has created a filter for the resource entity and selected the **List/Time/Map/Daily** checkbox. This filter is used when displaying the members of the group on the **Manage** screen.
  - b. Select the **Use only the resources according to the filter** check box.
  - c. Select the desired checkboxes to add or remove resources to the group.
  - d. Click **Submit** to save your changes.
4. To remove a favorite group:
  - a. Click the star icon next to the group name.
  - b. Click **Remove group**.
  - c. Click **Submit** on the confirmation dialog box.  
Only the group is removed. The resources added to the group are not deleted.

## Tips to Find Available Resources

You can add or move activities anytime and your technicians may ask for help anytime in completing an activity. You can locate an available resource through several different ways.

- Let the application propose the available resources. Use the *List view* to move the activity. The application then evaluates the activity and proposes a number of resources that can take the activity.
- Identify resources with idle time. Look in the *resource tree* to find a resource that does not have a full workload.
- Identify open time slots. Look in the **Time view** for white spaces in schedules. White spaces indicate free time.
- Identify nearby resources. In the **Map view**, select the **Nearby Resources** filter to see resources that are working near the location of the activity that needs to be moved.

### Related Topics

- [Resource and Activity Views](#)
- [How do I move an activity using the Assignment Assistant?](#)

## Use a Bucket for Capacity and Quota Management

If you want to use a bucket for quota calculation, you must configure the option in the **Resource & Bucket Info** screen. Typically, the buckets that you send activities to are also used for Capacity and Quota Management.

1. Click the hamburger menu and then click **Quota**.
2. Click **Configuration**.
3. Click the plus icon next to the **Name or ID** field.
4. In the **Add Capacity Area** dialog box, search for the bucket that you want to add as a capacity area and select it.
5. Configure the quota options as described in the Configure Quota Options topic in the Using Capacity Service guide.
6. Click **Save**.

## Resource Calendars

Calendars identify the hours that a resource works. This information is used to route activities and calculate arrival times. If a resource's schedule changes, you must update their working hours in the Calendar.

Oracle Field Service includes two types of schedules--default and individual. Default schedule is the working time configured for the whole organization, division, or for a particular geographic region. In other words, a default schedule is the working time added at the Organization unit or Bucket level, which is inherited by the child resources. Individual schedule is the working time applied to an individual resource. The individual schedule takes precedence over the default schedule. Further, you can change a default schedule to an individual schedule, and back to default schedule.

You can interact with a resource's calendar in two ways:

- **Calendars (Daily view):** Use the Calendars page (*Daily view*) to see the calendar of a resource, group or bucket for a whole week. You can use this view to make small changes to individual calendars in the current week.



- **Resource Calendar View:** Use the *resource calendar* view to see the details about an individual resource's schedule. You can use this view to make changes that involve more than one day or more than one resource.

## View a Resource's Calendar in Resource Calendar View

You can see an individual resource's schedule in the Resource Calendar view. You can use this view to make changes that involve more than one day or more than one resource.

1. Click the hamburger icon and click **Calendars**.

The calendar displays and shows the shift for all the resources in your group or bucket.

2. Use the horizontal scroll bar to view the calendar for past or future days.
3. Click the title for any day and select **Show schedule names**.

The names of schedules are displayed for all the days that you are currently viewing.

## View a Resource's Calendar in the Day View

You can see the calendar of a resource, group, or bucket for a whole week in the **Day** view. You can use this view to make small changes to individual calendars in the current week.

1. In the **Resource Tree**, select the **Resource**, **Group**, or **Bucket** for which you want to see the calendar.
2. Click the calendar and select the date for which you want to view the details.

The calendar displays.

3. Click the arrow buttons on either side of the date to change the date.
4. Click **View** to filter the information displayed.

Similarly, you can click the calendar and select **2 Days**, **3 Days**, **Week**, or **Month** to view the details for the corresponding duration.

## Modify a Calendar

Use the Calendar view to make small changes to an individual calendar, such as adding shifts and working time.

1. Click the hamburger icon and then click **Calendars**.

The Calendar view appears for the group or bucket assigned to you.

2. Select the bucket, group, or resource for which you want to change the calendar.

3. Click a future day for which you want to adjust the details.

You can change only for future days, you cannot change the calendar for past days. The dialog to adjust the shift details appears, as shown in this screenshot:

**BASILE, Terri, 04/11/22**

Schedule\*:

End Date\*:

Keep the Non-working days

Default schedule will be set for 04/11/22-04/30/22

4. When you finish modifying the calendar, click **Submit**.

Any previous shift that is applied to the resource is replaced with the new shift.

## Modifying a Calendar in the Resource Calendars View

You can use the **Resource Calendars View** to make big changes to calendars for Groups, Buckets, or Resources.

You can perform these tasks in this view:

- Add a Work Schedule to a Calendar
- Add a Shift to a Calendar
- Add Working Time to a Calendar
- Add Non-Working Time to a Calendar

## Set the Default Schedule for an Organization or a Bucket

Default schedule is the working time configured for the whole organization, division, or for a particular geographic region. You can add a default schedule at the Organization unit or Bucket level, so that all the child resources inherit it.

**Note:** There is no such option as 'Default schedule' in the calendar of the top organization unit.

1. Open **Resource Calendar** for the organization unit or bucket.
2. Click the date from which you want to set the default schedule.
3. In the **Schedule** field, select a schedule or shift. For example, select 8 to 5.
4. In the **End Date** field, select the date on which you want this schedule to end.
5. Select **Keep the Non-working days** to retain the non-working days that are defined for this level.
6. Click **Submit**.

The option ,Default schedule 8 to 5, is added to the **Schedule** drop-down list for the child resources of the selected organization unit or bucket. A default schedule is displayed with a darker color on the calendar, and an individual schedule is displayed with a lighter color.

## Return the Default Schedule to a Resource

If you use the same schedule for the whole organization or for a particular division, everyone in the division automatically gets the same schedule. If you change the schedule for an individual resource and if those changes are no longer needed, you can return the resource's schedule to the default schedule.

1. Go to the **Calendars** or **Resource Calendar** page.
2. Click the date for an individual schedule that you want to return to the default schedule.
3. In the **Schedule** drop-down list, select 'Default schedule'.  
You can see that the schedule that is configured for the organization unit or bucket is shown in brackets.
4. Click **Submit**.

The individual schedule is removed and the inherited schedule is applied. A default schedule is displayed with a darker color on the calendar, and an individual schedule is displayed with a lighter color.

## Add a Work Schedule or a Shift

You can assign a work schedule or a shift to a *resource*, *bucket*, or *group*. You can also define the on-call schedule of a resource using the Calendar view.

1. Click the hamburger icon and click **Calendars**.  
The calendar appears for the resources in your group or bucket.
2. For the resource for which you want to modify the calendar, click the shift for the required date.  
The modify calendar dialog box appears for the selected resource and date.
3. To change the work schedule or shift for the resource, update these fields:

Name	Description
Schedule	This list includes work schedules and shifts. Select the work schedule or shift that you want to apply to the resource.

Name	Description
	<p>Select Default schedule, to set the default schedule for the resource. Default schedule is the working time configured for the whole organization, division, or for a particular geographic region. In other words, a default schedule is the working time added at the Organization unit or Bucket level, which is inherited by the child resources.</p> <p>A default schedule is displayed with a darker color on the calendar, and an individual schedule is displayed with a lighter color.</p>
End date	The date on which the new work schedule or shift ends. Click <b>No date specified</b> to apply it for an indefinite time.
Comment	Enter any comments that you wish to provide, for example, the reason for changing the schedule.

4. To add the details of on-call for the resource, click On-Call and update these fields:

Name	Description
On-Call Schedule	<p>The field that specifies that the resource is on call. When you select an on-call shift, the on-call color coded icon that is attached to the shift appears. When you add this shift to a resource, this icon is displayed on the Dispatch Console, Manage, Calendar, and Resource Calendar pages, and on the resource avatar. Select On-Call. An On-Call shift shows the resources that are available to be contacted outside a regular working shift with the on-call icon. If you have not activated an On-Call shift, it is not suitable for activity assignment - either manually or in routing optimization, and is not used in capacity calculations. However, when you activate an on-call shift, activities can be assigned to the resource. If both regular and on-call shifts are assigned to a resource for a day, then the shift is automatically calculated based on these rules:</p> <ul style="list-style-type: none"> <li>○ If the route is activated during the regular shift period, then the regular shift is activated.</li> <li>○ If the route is activated outside of the regular shift period, then the shift with the closest start time is activated.</li> </ul>
End Date	Select the date on which you want to end the new working time. Click <b>No date specified</b> to apply it for an indefinite time.
Repeat	Select the frequency (Daily, Weekly, Yearly) at the new working time must be repeated. Enter the number of days or select the day of the week on which you want the new working time to be repeated. If you have selected Yearly, select the end date for the recurrence of the new working time. The end date of the new schedule is displayed below the field.

5. Click **Submit**.

## Add Working Time to a Calendar

Working time differs from shifts in that it represents start and stop times that may differ from the pre-defined shifts. Use working time when resources work a different number of hours than they normally do or when they work at a different time of the day than the other resources.

1. Click the hamburger icon and click **Calendars**.  
The calendar appears for the resources in your group or bucket.
2. For the resource for which you want to modify the calendar, click the shift for the required date.  
The modify calendar dialog box appears for the selected resource and date.


3. Fill up these fields:

Field name	Action
Schedule	<p>Select <b>Custom Working Time</b> from the drop-down list.</p> <p><b>Note:</b> You can create only one on-call shift per day. If you create a second on-call shift, the first one is deleted. You can remove an on-call shift if you assign a schedule for a resource. You can't remove an on-call shift, if you assign a regular shift, custom working time, or non-working time. You cannot remove an on-call shift, which is part of a Schedule.</p>
Start Time	Enter the time when the resource's work is to begin.
End Time	Enter the time when the resource's day ends.
Points	If you are using points to cap activity assignments, you can enter them here. These points work the same way as points associated with a shift.
Comments	Enter any comments that you would like to provide for the change in timings.
End Date	Select the end date for the schedule.
Repeat	<p>Select the frequency (Daily, Weekly, Yearly) at the new working time must be repeated. Enter the number of days or select the day of the week on which you want the new working time to be repeated. If you have selected Yearly, select the end date for the recurrence of the new working time. The end date of the new schedule is displayed below the field.</p> <p>You cannot add recurrence for a schedule and for Non-Working Time.</p>

Field name	Action
Keep the Non-working days	Select this check box to retain the existing non-working days in the resource's calendar. This check box is selected by default.

This screenshot shows the dialog box where you add the custom working time:


# DISNEY, Kathleen, 04/11/22


Schedule\*: Custom Working Time 

Start time\*: 11 AM  00 

End time\*: 08 PM  00 

Points:

End Date\*: 04/30/22 

Repeat\*: Weekly 

Every  weeks

Sun	Mon	<b>Tue</b>	Wed	Thu	Fri	Sat
-----	-----	------------	-----	-----	-----	-----

Keep the Non-working days

Comment: Doctor's appt at 8 am



**4. Click **Submit**.**

The new schedule is displayed on the calendar.

## Add On-Call, Non-Working, or Custom Working Time to a Calendar

Use *non-working time* to identify times when a resource, an organization unit, or a bucket isn't available for work. You can use the custom working time to specify a custom schedule for a resource. Similarly, you can use the on-call option to specify the time during which a resource is available on call. Be aware that you can change the calendar, only if you've the Read-Write permission for Resource Calendar on the Resource/User Info context layout structure.

**1. Click the hamburger icon and then click **Calendars**.**

The Calendar view appears for the group or bucket assigned to you.

**2. Select the bucket, group, or resource for which you want to change the calendar.**

**3. Click the date for which you want to add the non-working time, custom working time, or an on-call schedule.**

**4. Click On-Call and update these fields:**

Name	Description
On-Call Schedule	The field specifies whether the resource isn't working, is working in a custom schedule, or is on call. Select Non-Working Time, Custom Working Time, or On-Call. If you select the blank option, the existing on-call schedule is removed and the earlier schedule is restored. You can't remove an on-call shift, which is part of a Schedule.
Reason	If you've selected Non-Working Time, select the reason for which the resource isn't working. For example, Others. This field isn't displayed if you've selected Custom Working Time or On-Call.
Start time, End time	If you've selected Custom Working Time, select the custom start and end time of the schedule. This field isn't displayed if you've selected Non-Working Time or On-Call.
Comment	Enter any comment that you wish to provide, for example, Daughter's graduation day, or Dentist's appointment at 4:00 pm. This field isn't displayed if you select On-Call.
End Date	Select the date on which you want to end the new working time.
Repeat	Select the frequency (Daily, Weekly, Yearly) at the new working time must be repeated. Enter the number of days or select the day of the week on which you want the new working time to be repeated. If you've selected Yearly, select the end date for the recurrence of the new working time. The end date of the new schedule is displayed below the field.  You can't add recurrence for a schedule and for Non-Working Time.
Keep the Non-working days	Select this check box to retain the existing non-working days in the resource's calendar. This check box is available and enabled by default if the schedule is changed for more than a day. That is, it's available if you change the <b>End date</b> field.

**5. Click **OK**.**

If the non-working time can be applied, the resource is marked as a non-working resource for the selected date range. If the non-working time can't be applied, a warning message appears. If you click OK, the non-working time is applied, but a warning message appears on the resource tree for that resource on that day. Non-working time can't be applied if the technician has anything other than repeating, shift, or mass type of activities assigned on this route. The activities on the resource's route, other than mass and repeating activities, are rerouted or assigned to the bucket, if these conditions are met:

- The routing plan has the Enable reoptimization check box selected.
- The resource meets the routing plan filter conditions.



- If the **Use resources outside the bucket** option isn't selected for the routing plan, the activities may be assigned to the bucket despite having different work zones.
- If the **Use resources outside the bucket** option is selected, then it depends on the resource. If the resource is a child of the routing bucket, their activities may be assigned to the bucket even if the work zone isn't a common work zone. However, if the resource isn't a child of the routing bucket, then only the activities for which the bucket has all the work zones may be assigned to the bucket.

## Add a Recurring Schedule

Some times, resources work in a specific shift at regular intervals. For example, a field resource might visit a new site once a week for two months. You can define such schedules on the Calendars or the Resource Calendar page.

1. In the resource tree, click the field resource for which you want to update the calendar.
2. Click the hamburger icon and then click **Calendars**.
3. To set up a shift for one day:
  - a. On the calendar, click the starting date for which you want to apply the new schedule.
  - b. In the **Schedule** field, select the shift that you want to apply.  
The date that you have selected on the calendar is displayed in the **End Date** field.
  - c. Select None in the **Repeat** field.  
If you have selected a future date for End Date, it changes to the currently-selected date. Repeat is not available for Schedule and Non-working time.
  - d. Retain the selection in the **Keep the Non-working days** check box.  
The resource's individual existing non-working days (set as non-working time and has a reason) in the calendar are retained when the schedule is applied. This option doesn't have an impact when an assigned schedule contains non-working days (usually displayed as an empty schedule in the calendar).
  - e. Click **Submit**.  
A message indicates the number of days for which the shift is applied. The new schedule is applied to the field resource.
4. To set up a shift for several days in a row:
  - a. On the calendar, click the starting date for which you want to apply the new schedule.
  - b. In the **Schedule** field, select the shift that you want to apply.  
The date that you have selected on the calendar is displayed in the **End Date** field.
  - c. In the **End Date** field, select the date up to which you want to apply the new shift.
  - d. Select Daily in the **Repeat** field.
  - e. Enter 1 in the **Every** field.
  - f. Retain the selection in the **Keep the Non-working days** check box.  
The existing non-working days (set as non-working time and has a reason) in the resource's calendar are retained when the schedule is applied. This option doesn't have an impact when an assigned schedule contains non-working days (usually displayed as an empty schedule in the calendar).
  - g. Click **Submit**.  
A message indicates the number of days for which the shift is applied and the frequency of its recurrence. The new schedule is applied to the field resource.

5. To set up a shift with several days between occurrence:

- a. On the calendar, click the starting date for which you want to apply the new schedule.
- b. In the **Schedule** field, select the shift that you want to apply.

The date that you have selected on the calendar is displayed in the **End Date** field.

- c. In the **End Date** field, select the date up to which you want to apply the new shift.
- d. Select Daily in the **Repeat** field.
- e. Enter the interval (number of days) in the **Every** field.

For example, if you select 2 here, the shift is applicable every other day from the start date.

- f. Retain the selection in the **Keep the Non-working days** check box.

The existing non-working days (set as non-working time and has a reason) in the resource's calendar are retained when the schedule is applied. This option doesn't have an impact when an assigned schedule contains non-working days (usually displayed as an empty schedule in the calendar).

- g. Click **Submit**.

A message indicates the number of days for which the shift is applied and the frequency of its recurrence. The new schedule is applied to the field resource.

**Note:** If you use recurrence with days or weeks between the occurrence, all days between the new shift have an empty schedule, or inherit the schedule from the parent Org Unit or Bucket if any. For example: You want to set a 'Shift 8-15.00' for Mondays and Wednesdays for the whole of December. You select 1 November on the Calendar, select 'Shift 8-15.00', set End date '30/11/20', select Weekly repeat, and select Monday and Wednesday. The shift is applied for all Mondays and Wednesdays. All other days in November are non-working days (displays an empty schedule on the Calendar), if the parent resource doesn't have a schedule. If the parent resource has a schedule, then it is inherited for these days.

6. To set up a shift for specific weekdays:

- a. On the calendar, click the starting date for which you want to apply the new schedule.
- b. In the **Schedule** field, select the shift that you want to apply.

The date that you have selected on the calendar is displayed in the **End Date** field.

- c. In the **End Date** field, select the date up to which you want to apply the new shift.
- d. Select Weekly in the **Repeat** field.
- e. Enter the interval (number of days) in the **Every** field.

For example, if you enter 2 here, the shift is applicable every other week from the start date.

- f. Retain the selection in the **Keep the Non-working days** check box.

The existing non-working days (set as non-working time and has a reason) in the resource's calendar are retained when the schedule is applied. This option doesn't have an impact when an assigned schedule contains non-working days (usually displayed as an empty schedule in the calendar).

- g. Click **Submit**.

A message indicates the number of days for which the shift is applied and the frequency of its recurrence. The new schedule is applied to the field resource. If you use recurrence with days or weeks between the occurrence, all days between the new shift have an empty schedule, or inherit the schedule from the parent Org Unit or Bucket if any.

**7.** To set up a shift with a yearly recurrence:

- a.** On the calendar, click the starting date for which you want to apply the new schedule.
- b.** In the **Schedule** field, select the shift that you want to apply.

The date that you have selected on the calendar is displayed in the **End Date** field.

- c.** In the **End Date** field, select the date up to which you want to apply the new shift.
- d.** Select Yearly in the **Repeat** field.
- e.** In the **End repeat** field, select the date when the schedule stops repeating.
- f.** Retain the selection in the **Keep the Non-working days** check box.

The existing non-working days (set as non-working time and has a reason) in the resource's calendar are retained when the schedule is applied. This option doesn't have an impact when an assigned schedule contains non-working days (usually displayed as an empty schedule in the calendar).

- g.** Click **Submit**.

A message indicates the number of days for which the shift is applied and the frequency of its recurrence. The new schedule is applied to the field resource.

## Inventory

The term inventory describes the equipment that is used or the items that are consumed by activities. Inventory items can be located at the customer's home or business or carried in a technician's truck. Modems, faceplates, wire, cable, and electrical tape are all examples of inventory.

You can perform these tasks with inventory:

- Add an inventory type
- Install inventory
- Deinstall inventory
- Exchange inventory
- Change inventory properties
- Delete inventory
- Search the Parts Catalog

## Inventory Types

Inventory describes equipment that is used – or in the language of inventory – consumed by activities. Inventory items can be located at the customer's home or business or carried in a technician's truck. Modems, faceplates, wire, cable, and electrical tape are all examples of inventory.

Inventory includes both serialized and nonserialized items. Serialized inventory consists of individual pieces with serial numbers that identify both the type of equipment and the manufacturer/distributor.

Nonserialized inventory, such as faceplates, wire, and electrical type don't have serial numbers. This type of inventory is generic. You can exchange one manufacturer's supply for another based on a model number.

Nonserialized inventory is often accounted for in bulk by units of measure such as feet, pounds, dozen, and so on. Usually, technicians carry these items in their truck. However, the amounts required for individual activities are recorded with the serialized inventory on the Inventories List page against the technician.

This screenshot shows the **Add inventory type** page:

**Edit inventory type: "Ethernet Cable"**

\* Label: EC

Active:

Non-serialized:

Decimal quantity:

Quantity precision: 2

Model property: Model [inventory\_model]

* Name		Unit of measurement	
* English	Ethernet Cable	* English	ft
Spanish	Cable Ethernet	Spanish	m
French (European)	Câble Ethernet	French (European)	m
German	Ethernet-Kabel	German	m
Portuguese (Brazil)	Cabo Ethernet	Portuguese (Brazil)	pé
Japanese		Japanese	

Close Save

## Add an Inventory Type

You can create *serialized inventory* and *non-serialized inventory* types.

1. Click **Configuration**.
2. In the **Resources, Activities and Inventories** section, click **Inventory Types**.
3. Click **Add new**.  
The **Add inventory type** dialog box appears.
4. Complete these fields:

Field	Description
Label	Enter a unique identifier for this inventory type.

Field	Description
Active	Select this check box to make the inventory type available in drop-down lists.
Non Serialized	Select this check box if the inventory type is non-serialized.
Decimal quantity	Select this check box if you want users to add decimal quantity of the inventory. For example, 1.5 liters. This check box is displayed only if you select the <b>Non-serialized</b> check box.
Quantity precision	Enter the number of digits you want to display after the decimal. This check box is displayed only if you select the <b>Decimal quantity</b> check box.
Supports required inventory	Select this check box to make the inventory type required for selected activities.
Model Property	If desired, select additional characteristics for this inventory type from the drop-down list.
Name	Enter a name for this inventory type in each appropriate language field.
Unit of measurement	If this inventory type is non-serialized, enter a unit of measure. Use a language and a unit of measure appropriate for the country in which this inventory type will be used.

5. Click **Save**.

## Required Inventory

You can list both, serialized and non-serialized inventory as Required for a particular activity on the **Equipment list** tab.

The **Required Inventory** section always displays first on the **Equipment list** tab. There is no configuration required for it. The remaining inventory items display below the **Required Inventory** section. On tablets and mobile devices, if there is more than one item, inventory items are grouped by inventory type. An inventory group is collapsed, if there are more inventory items than set in the **Mobile Inventory Count** setting on the **User Options** page. This screenshot shows the **Equipment list** page:

↑ Activity Details

## Equipment List

Add to Required    Add to Customer

◀ 🏠 Required 1

Inventory Type	Model	Missing Quantity	Installed	Quantity
FIT2100 Treadmill	CT800	1		1

▶ 🚚 Technician 6

The application monitors the required inventory that resources carry in their trucks against the quantities required for the day's activities. It also warns them, if they have run out of an item needed to complete their route.

### Add the Required Inventory to an Activity

You may want to add some required inventory to an activity, before you start working on the activity, or while you are working on it.

1. Open the **Dispatch Console**.
2. Go to the resource or bucket to which the activity is assigned.
3. Open the **Activity details** page and click **Inventory**.
4. Click **Add to Required**.
5. Select an inventory item from the list and add the quantity.
6. Click **Submit**.

The inventory is added to the activity.

### Add the Required Inventory from Parts Catalog

You add the required inventory from the Parts Catalog, if it is mandatory in your organization.

1. Make sure that **Parts Catalog** is selected in the **Search Preferences** dialog.
2. Open the **Dispatch Console**.
3. Go to the resource or bucket to which the activity is assigned.
4. Open the **Activity details** page and click **Inventory**.
5. Click **Add to Required**.
6. Click **Search** and search for the item in the Parts Catalog.
7. Review the details of the required part and then click **Select**.

8. Fill in the quantity and click **Submit**.

The selected inventory is added to the activity.

## Edit the Required Inventory

After you add an inventory item to an activity, you can only change its quantity.

1. Open the **Dispatch Console**.
2. Go to the resource or bucket to which the activity is assigned.
3. Open the **Activity details** page and click **Inventory**.
4. Click the inventory item that you want to change and then click **Edit Required Inventory**.
5. Change the quantity and click **Submit**.

The inventory is updated.

## Delete the Required Inventory

After you add an inventory item to an activity, you can only change its quantity. If you want to change the model of an existing inventory item, you must first delete the existing item and then add the desired model.

1. Open the **Dispatch Console**.
2. Go to the resource or bucket to which the activity is assigned.
3. Open the **Activity details** page and click **Inventory**.
4. Click the inventory item that you want to delete and then click **Delete Required Inventory**.

The selected item is removed from the activity. The quantity of the item is increased either in the resource pool or in the Parts Catalog.

## Parts Catalog

Mobile personnel use the Parts Catalog to remotely access and search their company's spare parts inventory when working on maintenance and repair jobs.

Technicians assigned to installation jobs usually know which inventory they are installing, and they load the resources on their trucks accordingly. However, they can determine the parts necessary for replacement only at the customer's site after tests and diagnostics. Technicians can use the Parts Catalog to:

- Look up the spare part required for replacement
- Discuss the replacement terms (for example, price, period) with the customer
- Place an order for the spare part
- Find an alternative for a part, if the customer does not accept the initial offer
- Issue an invoice

The Parts Catalog updates automatically every 30 minutes after the application is launched, and supports both online and offline operations.

## Restrictions and Permissions for Parts Catalog

A resource must have the permission to use the Parts Catalog.

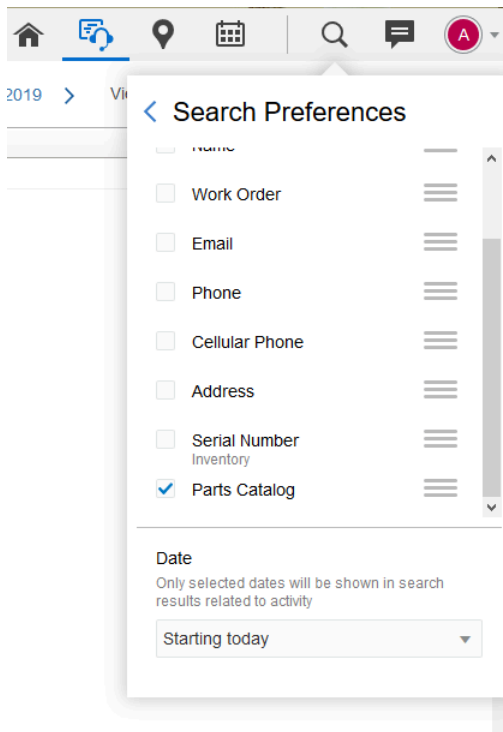
The permission enables or disables access to the Parts Catalog functionality. Select the **Parts Catalog** check box in the **General** tab of the **User Types** page for the required user type.

With this permission, the resource can access *only* catalogs in the language that was set for that resource.

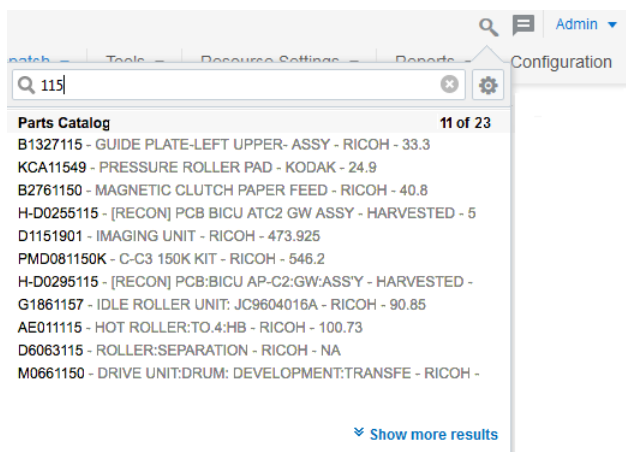
## Search the Parts Catalog

Parts Catalog is one of the search categories in the **Search preferences** window.

The search key that you enter must contain a minimum of three characters. Leading and trailing spaces are not included in the search key. The key is then matched against all searchable text fields defined in the Parts Catalog.



Search results are organized in a list containing the Parts Catalog item models and other previously defined properties.





The list header shows the total number of matches found and the number of entries currently displayed. If the results list is longer than the window length, the window shows the **Show more results link**, which displays 10 more search results. Scroll the search results using the vertical scroll bar. Click any search result item to display its details.

## Inventory Transactions

You can perform inventory transactions on behalf of a technician, if you have the user type permissions.

You perform the inventory actions on the **Inventory list** page on the Activity details page.

**Note:** You can see inventory actions such as, install, deinstall, and exchange only when the activity is in a Started status.

↑ Activity Details

### Equipment List

Add to Required    Add to Customer

Inventory Type	Model	Missing Quantity	Installed	Quantity
FIT2100 Treadmill	CT800	1		1

Required 1

Technician 6

Common inventory actions are listed in this section. The actual configuration may differ based on the way your organization has implemented the application.

### How do I install inventory?

Use the install inventory action to track equipment or inventory that is moved from the technician's inventory pool to the customer's inventory pool. Typically, technicians install new equipment as part of the activity completion process and the **Add to Installed** action tracks the inventory consumed during the activity.

1. Open an activity that is in Started status.

2. Open the **Inventory** tab and click **Add to Installed** for the equipment in the technician pool.  
The Add to Installed dialog box appears, as shown in this screenshot:

↑ Equipment List

## Add to Installed

### Update Inventory

Inventory Type  
FIT2100 Treadmill

Model  
CT800

Description

Serial Number  
2219XC768

Dismiss Submit

3. Enter the details of the inventory you are installing.

If this is non-serialized inventory and you enter a value that exceeds the quantity precision that's configured, then the precision is rounded off. For example: Quantity precision for an Inventory type = 2. You enter 1.4552; this is rounded off to 1.46. In general, the half-up rounding rule is applied; that is, 0.5 becomes 1 and 0.4 becomes 0. If you enter extra zeros after the decimal point, then all trailing zeros are trimmed and not displayed in the inventory pool. If you try to install more non-serialized inventory than you have in the pool, then the message, 'The quantity 6.5 exceeded your available quantity of 5. Are you sure you want to proceed?' is displayed.

4. Click **Submit**.
5. Optionally, click **Deinstall**.

This allows the ability to undo an install if, for example, a device was installed in error.

## How do I deinstall inventory?

Use the **Add to Deinstalled** action to track equipment or inventory removed from the customer pool. For example, if a technician removes an existing cable box at the customer premise, the **Add to Deinstalled** action tracks the removal of the equipment.

1. Open an activity that is in Started status.

- Open the **Inventory** tab and click the **Add to Deinstalled** link for the equipment in the customer pool. The Deinstall inventory dialog appears, as shown in this screenshot:

↑ Equipment List

## Add to Deinstalled

### Update Inventory

Inventory Type  
FIT2100 Treadmill

Model  
CT800

Description

Serial Number  
2219XC768

Dismiss
Submit

- Enter the details of the inventory you are deinstalling.

If this is non-serialized inventory and you enter a value that exceeds the quantity precision that's configured, then the precision is rounded off. For example: Quantity precision for an Inventory type = 2. You enter 1.4552; this is rounded off to 1.46. In general, the half-up rounding rule is applied; that is, 0.5 becomes 1 and 0.4 becomes 0. If you enter extra zeros after the decimal point, then all trailing zeros are trimmed and not displayed in the inventory pool. If you try to deinstall more non-serialized inventory than you have in the pool, then the message, 'The quantity 6.5 exceeded your available quantity of 5. Are you sure you want to proceed?' is displayed.

- Click **Submit**.

Equipment now shows as **Deinstalled**.

## How do I exchange the inventory installed for a customer?

Use the exchange action to replace equipment on the customer's premises with a piece of equipment from the technician's inventory pool.

Here's an example of an inventory exchange. Let's say a DVR set top box is being upgraded to a new model. The technician initiates an exchange action, which removes the equipment from the customer's pool and installs the upgraded box from the technician's inventory pool.

- Open an activity that is in Started status.
- Open the **Inventory** tab and click **Exchange**.
- On the **Inventory exchange** window, select another serialized inventory from the technician's inventory pool with which you want to exchange the customer's inventory.

4. Click **OK**.

When you exchange inventory, the original equipment in the customer pool shows as **Deinstalled** and the newly swapped device shows as **installed**.

## Change Inventory Properties

You can change the inventory properties on an existing customer pool inventory item.

1. Open the **Activity details** page for the activity that has the inventory to be modified.
2. Open the **Inventory** tab and open the inventory in the **Customer** pool.
3. Click **Update inventory**.

The **Update inventory** page appears:

↑ Equipment Details

### Update Inventory

CT800 - 2219XC768

Deinstall Exchange Delete Inventory

Inventory Type  
FIT2100 Treadmill

Model  
CT800

Description

Serial Number  
2219XC768

Dismiss Submit

4. Modify the required properties.
5. Click **Submit** to save changes.

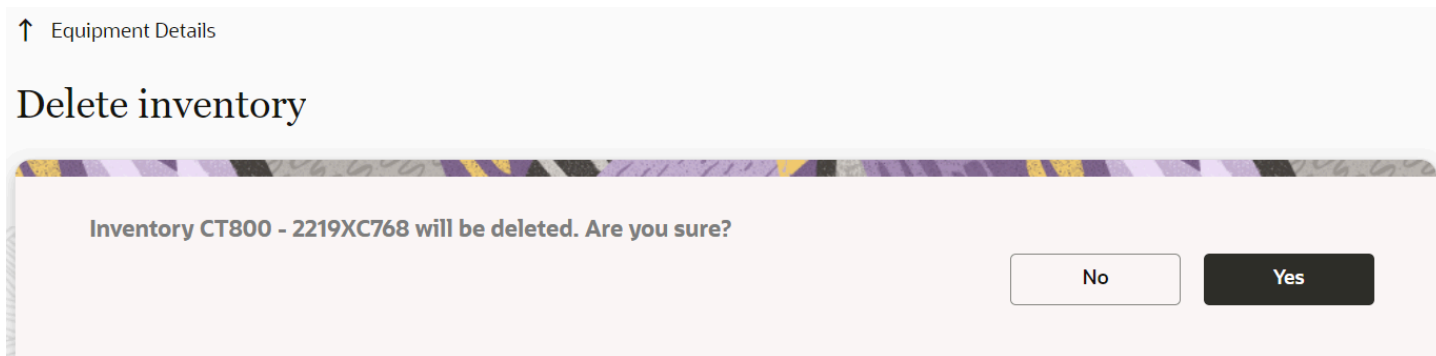
## Delete Inventory

Use the **Delete** action to delete items from the customer's inventory pool.

**Note:** You can delete inventory items only when the activity is in *Pending* status. When the activity is started, the Delete option is not available.

1. Open the **Activity details** page for the activity from which you want delete inventory.
2. Click the **Inventory** tab and go to the **Customer** pool.

3. Click the inventory that you want to delete, and then click **Delete**, as shown in this screenshot:



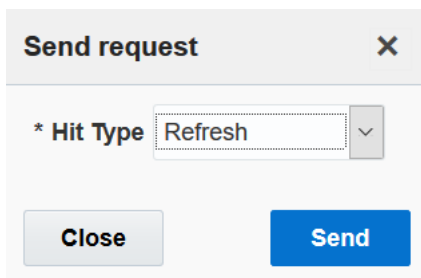
A confirmation message appears.

4. Click **Yes**.  
The inventory item is removed from the customer pool.

## Send a Hit

You configure a **Send Hit** request option to allow for the provisioning of equipment and services (that is, initialize device or refresh services). You can send a message, for example, to an external application and pass certain information to allow for the provisioning of that device. Send hit is usually configured as a **send request**, or a **manual message** in Oracle Field Service.

1. Click **Send Hit**.



2. Select the **Hit Type**.
3. Click **Send**.  
The manual message is triggered and sent as appropriate.

## Dashboard Charts and Reports

This section discusses the overview of dashboard charts and reports in the Oracle Field Service Mobile for Android and iOS app.

You can perform the following on dashboards and reports in Mobility:

- Configure dashboards in the Oracle Field Service Mobile app. The Main menu Dashboards in the mobile app serves as the single location to access Oracle Field Service reports, Oracle Field Service dashboards, and other application dashboards embedded in Oracle Field Service.
- Add Dashboard pages. You can now customize dashboard pages by arranging the available reports and dashboard in multiple tabs based on your preferences.
- Configure predefined dashboards. Predefined dashboards are ready to use dashboards for a user configured by another user. You can now configure predefined dashboards for a specific user type so that all the users in that user type can view this dashboard pages by default in dashboards.
- Configure available reports for a user type: You can now configure available reports or dashboards for a user type. Based on the configuration users in that user type will be able to see reports and dashboards in their available reports.

## Dashboard Charts

Dashboard charts are graphical representation of a report. You can configure a dashboard tab and drag the required chart icon from the Available reports menu and drop it inside a dashboard tab. The chart displays the details of the report accordingly.

You can remove a chart from a dashboard page using the X button in the upper right corner of the report.

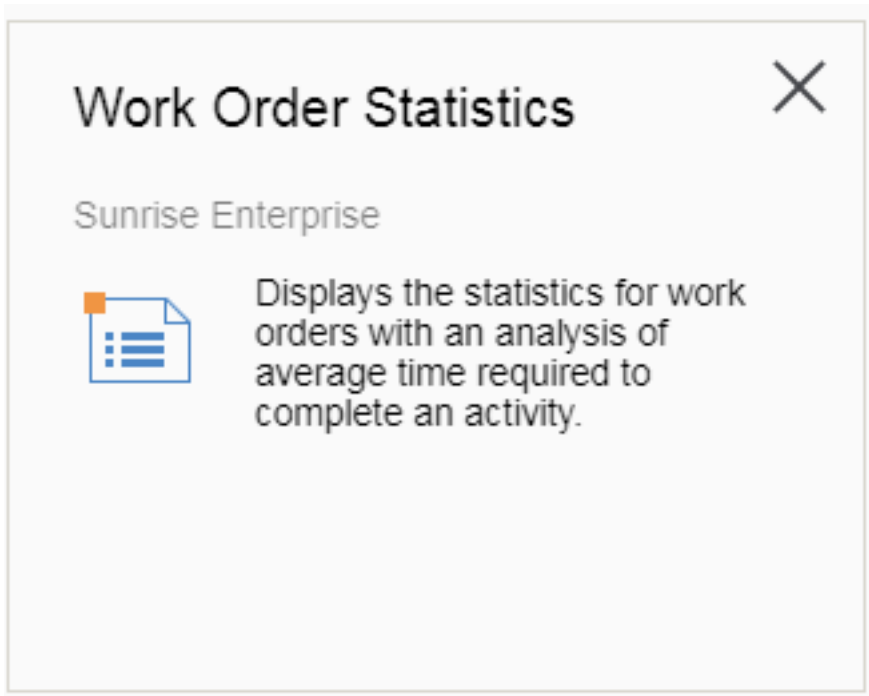
In case of predefined dashboards charts, administrators configure the settings at the time of creating the charts. Users who view the predefined dashboards cannot modify these settings.

## Standard Reports

Standard reports are represented as a tile in a dashboard tab. You can configure a dashboard tab and drag the report icon from the Available reports menu and drop it inside a dashboard tab. Reports are represented with a standard report icon and a name in the Available reports menu.

The report is displayed with a description of that report in the dashboard tab with a standard icon as follows:

This image shows a standard report.



While configuring a dashboard tab, you can add or remove the report tile from a tab. The Close button is available while configuring a dashboard. Clicking this button removes the report from dashboard tab. If the Available reports menu is hidden, you cannot remove or add reports to the dashboard tab.

Note that the following functionality is not available in the Core Application Dashboards:

- Reports export option
- Print the route option
- Schedule report option
- Report Resource-User association

## Work Offline

When you don't have Internet access while using the application, you still can manage your route and continue to perform many of your activity-related tasks. When the Internet connection is restored, your data is synchronized with Oracle Field Service Core Application

The application checks for the connection either periodically or when you perform some action. When your Internet connection is restored, it sends data about all the performed actions to Oracle Field Service and updates the data in the browser. All the actions performed offline are transferred in their chronological order, and the changes you made offline are merged with the changes in the application. This way, data in your mobile device browser is synchronized with the data in Oracle Field Service.

## Synchronization Conflicts

Offline functionality constraints may cause some conflicts during the synchronization. Conflict occurs if the changes you have made offline contradict with the relevant changes made in Oracle Field Service in the online mode (automatically or manually). Some examples of conflicts are as follows:

- You deactivated the route while offline, while a new activity was added to the route.
- You created an activity while offline, while the your route was deactivated.
- You started and completed an activity in the offline mode, while this activity was moved to another user or rescheduled.
- You completed the same activity in the offline mode and set to not done in Oracle Field Service.

## Resolve a Conflict

If a synchronization conflict occurs, you cannot synchronize some changes. In addition, some actions performed in the offline mode can be rejected. In this case, the error 'Internal error. Please review your route.' is displayed. You can view the details of the conflict and resolve it only through Oracle Field Service Core Application. You can track synchronization conflicts in the activity history, through the 'sync error' label.

1. Log in to Oracle Field Service Core Application.
2. Click **Dashboard** and then click dashboard in which you have configured the Offline Synchronization report.
3. In the **View** pane (left pane), select the resource and date for which you want to view the report.
4. Click **Offline Synchronization**.

The **Offline Synchronization** report is displayed. If there are no conflicts, the message, No conflicts found is displayed. If there are any conflicts, the conflicts are displayed in a table. This screenshot shows the Offline Synchronization report and indicates that there are no conflicts:

The screenshot shows the Oracle Field Service Core Application interface. At the top, there is a breadcrumb '↑ Dashboards' and the title 'Offline Synchronization' for user 'ARNDT, William'. A 'View' dropdown menu is visible on the right. Below the title is a search bar 'Q Name or ID' and a list of resources: ACME Contractor, Cranes, ARNDT, William (selected), BASILE, Terri, and BOVE, Leticia. The main content area displays a table with the following columns: Type, Identifier, Rejected action, Field, Value, Time, User, and Reason. The table content shows 'No conflicts found'.

5. Review the information in the conflict data table.

Column	Description
Type	The icon for the entity in which conflict has occurred: <ul style="list-style-type: none"> <li>○ Route</li> <li>○ Activity</li> </ul>



Column	Description
	<ul style="list-style-type: none"><li>o Inventory</li><li>o Service request</li></ul>
Identifier	The activity identifier in which conflict has occurred.
Rejected action	The failed action.
Field Value	The list of fields with corresponding values in which conflict has occurred.
Time	The time at which the operation was rejected.
User	The user that performed the activity.
Reason	The reason for which conflict has occurred.

6. [Optional] To filter conflicts, use the **View** drop-down menu and specify the filter.
7. Resolve the conflict manually by adding the appropriate details either in Oracle Field Service or in your external application such as CRM, Billing, or Provisioning.
8. After the conflict is resolved, select the check box in the first column and click **Mark resolved**.

## Monitoring

### Monitoring the Field

You can get a clear view of what is happening in the field in real time.

With one glance, you can tell who is currently working on which activity, whether resources have the right amount of work, and whether activities are in jeopardy of losing their service window. You get the information you need to address before they become problems.

### Monitoring First Thing in the Morning

At the beginning of the day, dispatchers and supervisors will want to verify that the resources' routes have been activated on time, the routes are efficient, and manual routing of new activities has been performed.

Perform these tasks:

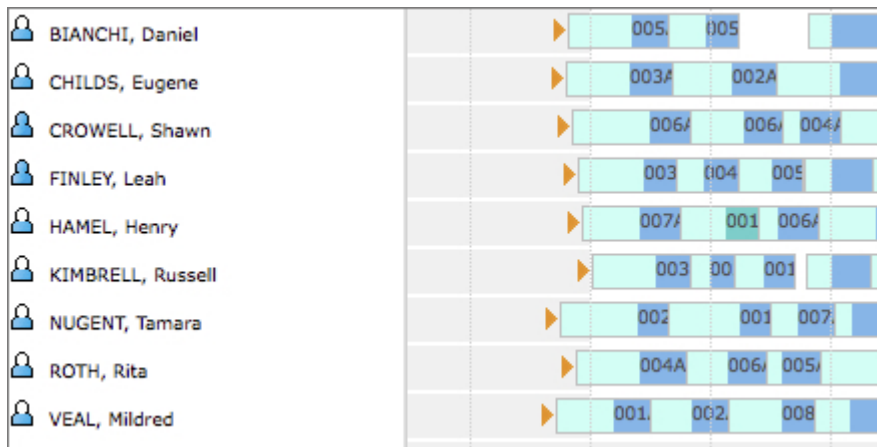
- *Check for route activation*
- *Identify available capacity*

#### Check for Route Activation

At the beginning of the day, dispatchers and supervisors will want to verify that the resources' routes have been activated on time, the routes are efficient, and manual routing of new activities has been performed. At the start of the shift, you can check the resource tree to verify that all of the resources have activated their routes.

1. In the resource tree, expand the bucket or buckets to see all of your resources.
2. Look for orange arrows at the beginning of the routes.

The start route indicator should be visible at the resource’s scheduled start time, as shown in this screenshot:



3. Use the resource tree search filters to narrow the list to only the resources that have not activated their routes. Investigate the resources that don't have orange arrows at the starts of their routes.
4. For routes that should be active, contact the resources and ask them to activate their routes. Alternatively, you can activate the route on the resource’s behalf.

## Identify Available Capacity

To make schedules more efficient, you can identify resources with available capacity on their schedules and then fill the *idle time* with activities.

1. In the **Resource Tree**, expand the bucket or buckets to see all of your resources.
2. Look for icons that are both white and blue.

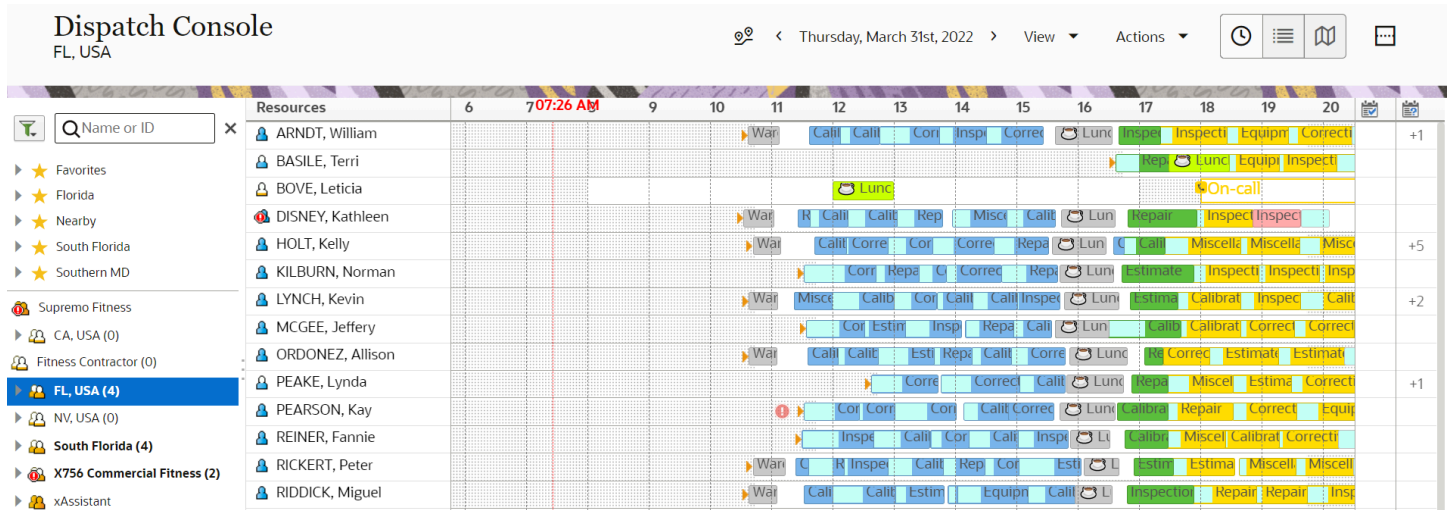
Icons that are completely blue indicate full loads. Icons that have some white space indicate less than full loads.

Icon	Meaning
	1/3 – resource has a low or no loading of activities.
	1/2 to 2/3 – resource has an average load of activities.
	Solid – resource has a load equal to or above the full load threshold and cannot take any additional work.

## Monitoring During the Day

When monitoring routes, the most important thing to pay attention to is the vertical red line that travels across the screen.

The red line represents the current time of day; the time is displayed at the top end of the line. Items to the left of the red line are in the past; items to the right of the red line are in the future. Consider the actions mentioned later to identify activities that might be in jeopardy of missing the service window. Look for blocks under the red line that are not dark green started activities or aqua green driving time. If the activity is any other color, there is a chance that the resource will not arrive in time to meet the service window. This screenshot shows the Time view page:



**Actions to consider:**

- Contact the resource to identify why the activity is not on schedule.
- If the resource forgot to start the activity, ask the resource to start the activity. If necessary, you can start the activity on behalf of the resource.
- If more time is necessary, ask the resource to add time to the activity. If necessary, you can add time to the activity on behalf of the resource.
- If necessary, move the activity to another resource.
- If the resource starts the activity late or if adding time is necessary, review the route to look for future activities that may be affected.
- If Oracle Field Service Smart Location is available, turn on **Show Resource Trace** and monitor employee compliance.

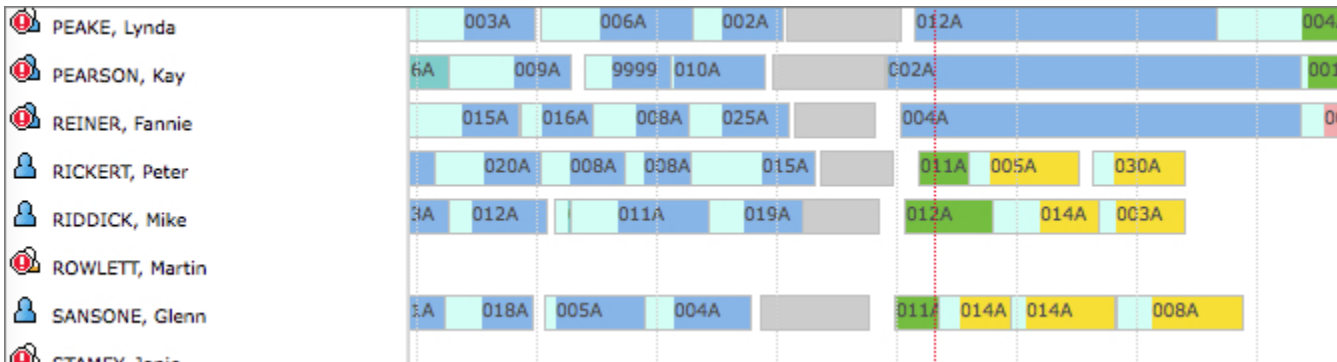
*Related Topics*

- [Identify Jeopardy Situations](#)
- [Add Time to an Activity](#)
- [Start an Activity](#)
- [How do I move an activity using the Assignment Assistant?](#)

## Identifying an Add-Time Situation

When an activity takes longer than projected, the resource must add time to the activity.

Look for green **Started** activities that do not extend to the red line (current time), which indicates the end of day or shift, as shown in this screenshot:



**Actions to consider:**

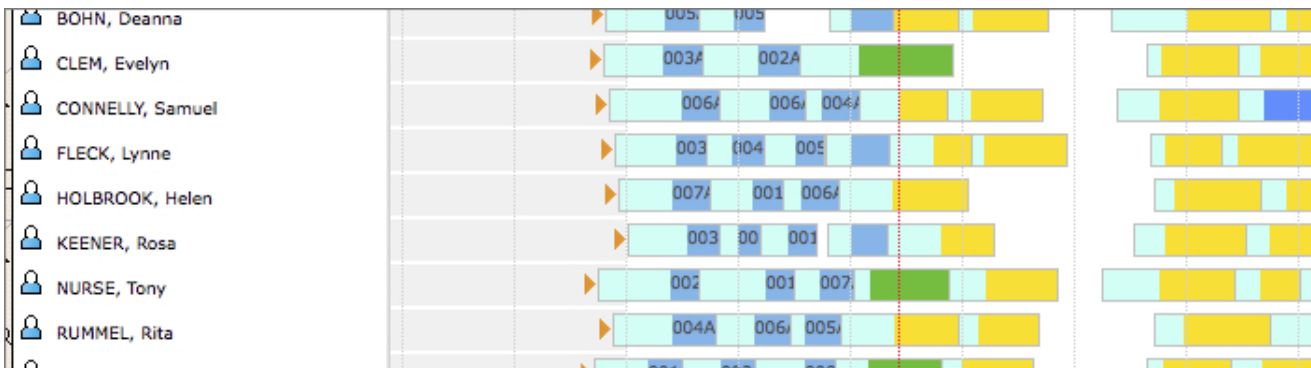
- Contact the resource to find out if a delay is necessary. If so, ask the resource to add time to the activity. If necessary, you can add time on behalf of the resource.
- If adding time to an activity is necessary, review the route to look for future activities that may be affected.

*Related Topics*

- [Add Time to an Activity](#)
- [Identify Jeopardy Situations](#)

## Identifying a Late-Start Activity

There are several reasons why the application may show an activity as starting late, and several options for resolving it.



If a yellow or red **Pending** order appears underneath the timeline, and the order before it is **Completed** (blue), one of these situations is likely:

- The resource is still driving to the activity, but the drive is taking longer than predicted.
- The resource is at the activity, but has forgotten to start the activity in the application.
- The resource has started an activity, but forgotten to record the activity in the application.

**Actions to consider:**

- Contact the resource to determine why the activity is not started. If the resource forgot to start the activity, ask the resource to start the activity. If necessary, you can start the activity on behalf of the resource.
- If more time is necessary, ask the resource to add time to the activity. If necessary, you can add time to the activity on behalf of the resource.
- Move the activity to another resource.
- If the resource starts the activity late or if adding time is necessary, review the route to look for future activities that may be affected.

*Related Topics*

- [Add Time to an Activity](#)
- [Start an Activity](#)
- [Identify Jeopardy Situations](#)
- [How do I move an activity using the Assignment Assistant?](#)

## Identify Jeopardy Situations

A jeopardy situation means that the activity will miss its promised service window. Jeopardy situations are easily identified by the pink blocks on the *list view* or *time view* screen. You can change the colors per your organization’s requirements, and you can display the status in text in the activity hint.

**List View:** Activity in jeopardy:

Activity	Activity type	Time Slot	Capacity Categories	Activity status	Duration	Service Window
<input type="checkbox"/>	HSD / High Speed Data install	08-10	Deinstall	completed	00:34	08 AM - 10 AM
<input type="checkbox"/>	Other	08-10	Deinstall	completed	00:28	08 AM - 10 AM
<input type="checkbox"/>	Inv Pick up	10-12	Deinstall	completed	00:26	10 AM - 12 PM
<input type="checkbox"/>	Other	10-12	Deinstall	completed	00:27	10 AM - 12 PM
<input type="checkbox"/>	Telephony Unwired Installs	10-12	Deinstall	completed	00:33	10 AM - 12 PM
<input type="checkbox"/>	Lunch break			completed	00:39	
<input type="checkbox"/>	Other	13-15	Install	started	00:43	01 PM - 03 PM
<input type="checkbox"/>	Other	13-15	Install	pending	00:21	01 PM - 03 PM
<input type="checkbox"/>	Add Outlets	13-15	Trouble Call	pending	00:26	01 PM - 03 PM
<input type="checkbox"/>	Telephony SRO	15-17	Trouble Call	pending	00:48	03 PM - 05 PM
<input type="checkbox"/>	HSD SRO	15-17	Trouble Call	pending	00:48	03 PM - 05 PM

**Time View:** Activity in jeopardy:

Providers	11	12	13	14	15	16	17	18
DISNEY, Kathleen	Multi	Othe	Lunch br	PAC Installs	Telej	Teleph		

To identify situations that are in jeopardy:

1. Identify activities that are in jeopardy.
2. Do one of these:

- Move the activity to a resource that has *idle time*.
- Move the activity back to the bucket to be re-routed later.
- If the resource can arrive on time despite the warning, don't thing.

#### Related Topics

- [How do I move an activity using the Assignment Assistant?](#)

## Identify Resources That have Stopped Reporting

When the start time for an activity has passed and the activity is not started in Oracle Field Service, the resource has stopped reporting.

1. Change your view to *Time view*.
2. In the resource tree, select the bucket or group that contains your resources.  
The routes are displayed.
3. Look for activities that have start times before the current time of day and are pink.  
Pink indicates that the activity is still pending and is late.
4. Contact the resource to identify why the activity is not yet started. If the resource forgot to start the activity in the application, ask him or her to start it now.  
If necessary, you can also start the activity on the resource's behalf.

## Monitoring at the End of the Day

At the end of the day, dispatchers and supervisors will want to verify that the resources' routes have been deactivated on time, that all pending activities have been allocated for re-routing and that overtime situations are minimized.

Perform these tasks:

- [Identify pending activities](#)
- [Identify overtime situations](#)
- [Check for route deactivation](#)

## Identify Pending Activities

At the end of the day, dispatchers and supervisors will want to verify that the resources' routes have been deactivated on time, that all pending activities have been allocated for re-routing and that overtime situations are minimized. At the end of the day, any activities that are still pending must be allocated either to a new route or back to the bucket to be routed automatically.

1. Change your view to **Time View**.
2. In the **Resource Tree**, select the bucket or group that contains your resources.  
The routes are displayed.
3. Look for activities that are yellow (pending activity, on time), pink Pending activity (in jeopardy of being late), or lime green (Pending internal activity or teamwork).

4. Choose one of these options.
  - o Move the activities back to the bucket so that they can be re-routed.
  - o Manually move the activities to another route.
  - o Change the activity status to Not Done.

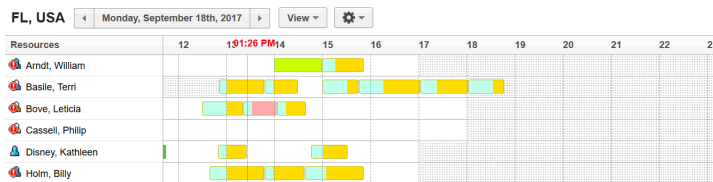
Some companies run a script that automatically moves activities with Not Done status back to the bucket.

## Identify Overtime Situations

When resources have activities scheduled outside of their normal working hours, you might want to move those activities to another resource or another time slot.

1. Click **Time View**.
2. In the resource tree, select the bucket or group that contains your resources.

The routes are displayed



3. Look for activities that extend beyond the white area into the grey area.
4. Choose one of these:
  - o Move these activities to other resources or other time slots.
  - o Move them back to the bucket so that the system can re-route them.

The white area represents the resource’s shift. The grey area represents time before or after the shift.

## Check for Route Deactivation

At the end of the shift, you can check the resource tree to verify that all of the resources have deactivated their routes. Routes must be deactivated so that calculations are accurate.

### Before you start

Before you can deactivate a route, you must reconcile any pending activities remaining on the route.

### Here's what to do

1. In the resource tree, expand the bucket or buckets to see all of your resources.
2. Check the color of the icons for each of your resources.

The default color coding is as follows:

- o Blue icons indicate that the resource has activated the route.
- o Yellow icons indicate that either the route is inactive, or that the resource does not have a route.
- o Gray icons indicate that the route is deactivated.

**Note:** The resource tree search filters search only for resources that have active routes.

3. Contact resources that have yellow and blue icons and ask them to deactivate their routes.  
If necessary, you can deactivate the route on behalf of the resource.

*Related Topics*

- [Deactivate a Route or Queue](#)
- [Identify Pending Activities](#)



# 3 Field Resource Activities

## Best Practices

Oracle Field Service Mobile for Android and iOS works best when it receives accurate information. For best results and to make your day-to-day work run smoothly, follow these best practices:

Activate your route on time. This lets dispatch know that you are on the job and ready for work.

- *Activate Your Route*

Start and stop your jobs when you actually start the work and end the work.

- *How do I start an activity as a field resource?*

If you forget to start a job, contact your dispatcher or supervisor and give them your actual start time so they can start the job for you and enter the actual time you started.

If you find that your job will take longer to complete than the duration assigned to it, add time to the job right away.

- *Add Time to an Activity*

Follow your company's procedures for those times when you cannot complete the activity.

- *How do I suspend an activity?*
- *Mark an Activity as Not Done*
- *How do I reschedule an activity?*

Add activities to designate time that is used for anything work related, even company meetings, lunch breaks, and stops for gas.

- *Add an Internal Activity*

Deactivate your route at the end of day.

- *Deactivate the Route*

Logout when you are finished for the day.

- *Log Out*

## Start Your Day

### Before You Start Your Day

The tasks you perform at the beginning of the day are important to the workday ahead.

These tasks include logging in, viewing your activities, and activating your route.

#### Related Topics

- [How do I create and use a PIN?](#)
- [View Activities](#)
- [Log In](#)
- [Activate Your Route](#)

## Log In

You can communicate with the dispatchers and management throughout the day using the installed app on a tablet or a smart phone. Simply browse to the URL provided by your system administrator.

Logging in requires a user name and password. Your system administrator assigns user names and passwords. Any web-enabled mobile device can access the application. If your organization uses the **Overnight Work** feature, and you have not deactivated your route and signed out of the application, you will see the previous day's date when you log in the next day.

1. In your mobile web browser, enter one of these URLs:

- `https://{alias}.fs.ocs.oraclecloud.com/m`
- `https://{alias}.fs.ocs.oraclecloud.com/m/company_name` , where *company\_name* is the name of the mobile environment provided by your system administrator

Depending on the defined login policy, the URL may need to be appended with the login policy. For example, for **openidconnect**.

2. (Optional, depending on the URL you entered.) Type your company name in the **Company** field.
3. Type your user name in the **Username** field.
4. Type your password in the **Password** field.
5. Click **Sign in**.

#### Results:

The home page configured for your user type opens.

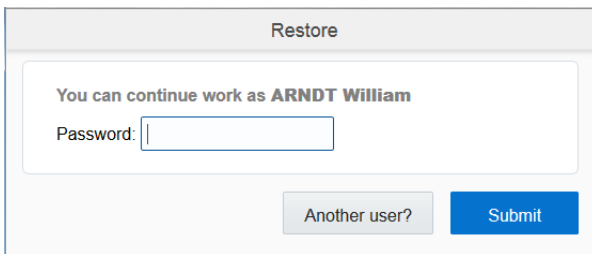
**Note:** You will be blocked from logging in once you reach the maximum number unsuccessful log in attempts. If you have forgotten your password, ask your system administrator to reset it.

## Create and Use a PIN

In addition to signing in with a password, you also can use a personal identification number (PIN) to access the application on Android and iOS devices.

When you sign in to Oracle Field Service Mobility Cloud Service for the first time, you're prompted to create a PIN.

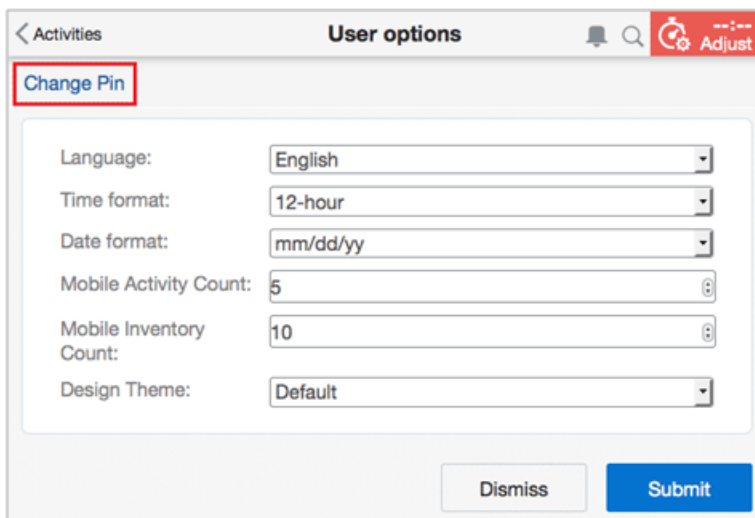
In some situations, you're asked to reenter/restore your PIN.



- After too many unsuccessful sign in attempts (if you've forgotten your password)
- When you sign in again and the page you were on when you logged out has been saved to the cache

You also can reset your PIN from the **Restore** page. Enter your PIN and click **Reset PIN**. The application logs you out and prompt you to sign in again, using your password. You're then redirected to the **Set PIN** page to create a new PIN.

When certain authentication methods have been implemented, you'll have the option to change your PIN instead of your password on the **User options** page.



Click **Change Pin** to access the **Change PIN** page. You must change the PIN for yourself, you can't change it for other users.

## Activate Your Route

You must activate your route at the beginning of every workday. You cannot start an activity until your route has been activated. This is a signal to the dispatcher and to your supervisors that you are ready to work and available to take jobs.

1. Log in to Oracle Field Service.  
A list of your activities for the day displays.
2. Click **Activate Route**.

3. Click **Yes** on the confirmation dialog box.

**Note:** After the route has been activated for the day, the **Activate Route** option no longer displays on the menu.

## Print Route

Now, the Print Route will have a more compact view. The Print Route option available in the Dispatch Console and Activity List screens enables users to print the route of field resources.

1. Navigate to the Activity List screen for a selected resource.

2. Click Actions, Print to print the route.  
This image displays a preview of the print route.

# Activities

(as of 06/17/21 10:44 PM)

## ARNDT, William

---

<b>01</b>	Activity ID <b>3952899</b>	Address <b>528 YELLOW TAIL PL</b>	City <b>OVIEDO</b>
	State <b>FL</b>	Coordinate Status <b>found</b>	Start <b>08:26 AM</b>
	ZIP/Postal Code <b>327666006</b>	Start - End <b>08:26 AM - 08:53 AM</b>	Account <b>0199213</b>
	Activity Type <b>Regular</b>		
	Customer Inventory: TD0530121, 200299908, 0006207612		

---

<b>02</b>	Activity ID <b>3952900</b>	Address <b>36 JACKSON CIR</b>	City <b>WINTER</b>
	State <b>FL</b>	Coordinate Status <b>found</b>	Start <b>09:41 AM</b>
	ZIP/Postal Code <b>327083424</b>	Start - End <b>09:41 AM - 10:10 AM</b>	Account <b>0199216</b>
	Activity Type <b>Regular</b>		
	Customer Inventory: 200491277, SARC14242, SABKHWV		

---

<b>03</b>	Activity ID <b>3952901</b>	Address <b>4004 ISLAND BAY CIR</b>	212 City <b>SANFOR</b>
	State	Coordinate Status	Start

## Configure Capacity Area Buckets

You can configure a capacity area using the Core Application.

### Before you start

#### Configure access to Quota Configuration

To access the Quota Configuration page, you must configure the Read-Only or Read-Write visibility for the user type. You can configure the visibility as follows:

1. Log in to the application with a user who has permissions to update the page configuration.
2. Click **Configuration, User Types**.
3. Select the required user type and select the **Screen Configuration** tab.
4. Select **Quota** from the Application Screens section.
5. Add the **Quota configuration** tab to the existing configuration as ReadOnly, ReadWrite.

You can add capacity area buckets in the Quota Configuration page as follows:

### Here's what to do

1. Select **Quota**.
2. Click the **Configuration** icon.
3. Click the **+** icon (next to the Search field).

The Add Capacity Area window displays the resource tree with these icons:

- Double figure: An organization unit or a bucket.
- Single figure: Field resource.
- Full blue filling: The resource tree item cannot be added as a capacity area (since it is already present in the capacity areas).
- Half blue filling: The resource tree item can be added as a capacity area.
- Grey icons: An item cannot be added as a capacity area (the tree branch already has another capacity area, or the resource type does not allow it).

4. Select the capacity area or search for the required capacity area and click **OK**.

The selected capacity area displays in the left pane. If a selected item cannot be used as a capacity area, a popup notice displays "Resource already defined as a Capacity Area".

5. To remove a capacity area bucket:
  - a. Go to the quota **Configuration** page.
  - b. Select the resource that you want to stop using as a capacity area.
  - c. Click **Stop using as a Capacity Area**.
  - d. Click **Save**.

## About Working Offline

When you don't have Internet access, you still can manage your *route* and continue to perform many of your daily tasks.

The word **Offline** in orange text below your name on your home page indicates that your Internet connection is not stable enough to support online operations, and that the application is not sending or receiving information. Activity tasks and options that are not available when working offline are disabled in the menu bar.

Tapping the word does two things:

- Displays a message confirming that you are offline
- Initiates the synchronization process, which checks the availability of an Internet connection

When you work offline, your actions are saved in your browser’s memory. The actions synchronize with the **cloudfieldserv** server as soon as your mobile device is back online. Subsequently, there is no need for you to check your Internet connection continuously. When the connection is restored automatically, the **Offline** text disappears and the normal menu bar displays.

**Note:** Offline storage capacity is limited, and is device- and browser-dependent. For example, iOS browser storage capacity is 5MB; Chrome on Android is 10MB. One way to minimize the amount of data that needs to be stored offline is for field managers to configure the pages to show only the information that is essential for job performance.

If you suddenly lose your connection, you should also be aware that:

- You will be redirected to your home page if you are in one of the pages that is not available in the offline mode.
- You cannot send or receive updates to your route. You must contact dispatch to review all changes that affect your route.
- You might see a message telling you that you have exceeded your browser’s memory-storage limit, indicating that some of your actions will not be saved.

Some things you should know about the synchronization process:

- If synchronization completes successfully, the message, **Synchronization completed** appears and the normal online page displays.
- If a synchronization error occurs, the message, **Internal error. Please review your route.** displays.
- If you attempt to access one of the online-only pages when the connection has just been restored but the synchronization process is not yet complete, the message, **Synchronization in progress. Please wait.** appears, with a red **Loading** indicator in the bottom-right corner of the page.

You can:	You cannot:
<p><b>For the route</b></p> <ul style="list-style-type: none"> <li>• Activate/deactivate/reactivate route</li> <li>• Browse the activities list</li> <li>• Print the route</li> <li>• Add activities</li> <li>• Send resource requests</li> <li>• Browse the resource-request list</li> <li>• Browse resource-request details</li> </ul> <p><b>For scheduled activities</b></p> <ul style="list-style-type: none"> <li>• Change activity order/position in the route</li> <li>• Browse activity details</li> <li>• Edit activity details</li> </ul>	<p><b>For resources</b></p> <ul style="list-style-type: none"> <li>• Log in/log out</li> </ul> <p><b>Note:</b> If you close and then reopen your browser during the time you are offline but are within the session expiration time, the browser will restart and the offline session will resume. Enter the URL of any page to access the Restore page.</p> <ul style="list-style-type: none"> <li>• Change your password</li> <li>• View maps, directions, or map layers</li> <li>• View calendars</li> <li>• Select a resource or change users</li> <li>• Change options</li> <li>• Manage activities not on today’s route</li> </ul>



You can:	You cannot:
<ul style="list-style-type: none"> <li>Set an activity to started/completed/canceled/delayed/suspended/not done</li> <li>Delay/adjust time</li> <li>Create/complete/delay pre-work</li> <li>Send activity requests</li> <li>Browse the activity-request list</li> <li>Browse activity-request details</li> </ul> <p><b>For non-scheduled activities</b></p> <ul style="list-style-type: none"> <li>Send activity requests</li> <li>Cancel activities</li> <li>Browse activity details</li> <li>Edit activity details</li> </ul> <p><b>For inventory</b></p> <ul style="list-style-type: none"> <li>Browse the inventory list</li> <li>Browse/edit inventory details</li> <li>Add/edit/install/deinstall/exchange inventory</li> <li>Send inventory requests</li> <li>Browse the inventory-request list</li> <li>Browse inventory-request details</li> </ul> <p><b>Other</b></p> <ul style="list-style-type: none"> <li>Manage activity links (with some constraints)</li> <li>Search the Parts Catalog (if provisioned and cached)</li> <li>Work with segmentable activities (however, the number of segments cannot be calculated correctly)</li> </ul>	<ul style="list-style-type: none"> <li>Add a teamwork activity</li> <li>Reschedule an activity</li> <li>View nearby activities</li> <li>View activity history</li> <li>Download and view thumbnails of files, images, and signatures</li> </ul> <p><b>Note:</b> You can add new files to the activity when you are offline, but they are synchronized only when you are back online. By design Filter restrictions are applied only when you are online. When you are offline, you can only use the options that were loaded in the filter till the time the device went offline.</p> <ul style="list-style-type: none"> <li>Preview files that are already on the server</li> <li>Use buttons that are only available for online use</li> <li>Use Oracle Field Service Collaboration Service</li> <li>Use Oracle Field Service Smart Location</li> </ul> <p><b>Functionality for field managers only</b></p> <p><b>Note:</b> These tasks are in addition to the ones listed above.</p> <ul style="list-style-type: none"> <li>Move an activity to another resource (when move within a user's route is enabled)</li> <li>View all resources on the resource selection page if all resources don't fit on a single page</li> <li>View the Manage page</li> <li>Perform resource-management functions including, but not limited to: <ul style="list-style-type: none"> <li>Create/edit groups</li> <li>Make calendar changes</li> <li>Use the team map</li> <li>Use the Gantt view</li> </ul> </li> </ul>

If a synchronization conflict occurs, you may not be able to synchronize some changes. In addition, some actions performed in the offline mode can be rejected. In this case, the message, 'Internal error. Please review your route.' is displayed. You can view the details of the conflict and resolve it only through Oracle Field Service Core Application. You can track synchronization conflicts in the activity history in Oracle Field Service Core Application, under the **sync error** label. You can view the rejected actions in the Offline Synchronization Dashboard report. This table describes the columns in the report:

Column	Description
Type	The icon for the entity in which conflict has occurred: <ul style="list-style-type: none"> <li>Route</li> <li>Activity</li> <li>Inventory</li> <li>Service request</li> </ul>

Column	Description
Identifier	The activity identifier in which conflict has occurred.
Rejected action	The failed action.
Field Value	The list of fields with corresponding values in which conflict has occurred.
Time	The time at which the operation was rejected.
User	The user that performed the activity.
Reason	The reason for which conflict has occurred.

You can resolve the conflict manually by adding the appropriate details either in Oracle Field Service or in your external application such as CRM, Billing, or Provisioning.

## Field Resource User Interface

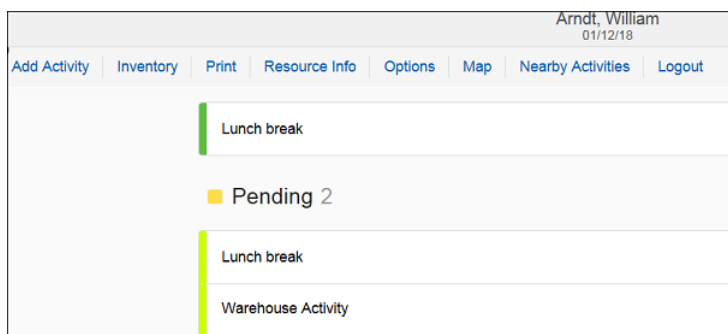
### Field Resource Landing Page

The Field Resource Landing page provides useful information about you, such as the activity details, route, inventory, and so on.

Your administrator configures the Field Resource Landing page using the 'Field Resource Landing Page' parameter. You can see either the **Activity List** view or **My Route** option depending on the configuration.

#### Activity List

When your Administrator has configured the **Activity List** option, you see the list view upon logging in.



#### My Route

When the **My Route** option is configured, you see your route details. The page also displays a number of tiles related to activities, travel details, route details, and team details. This information helps you to make decisions instantly without

having to navigate to different pages. Based on the device, the content appears either in a narrow or a wide screen mode. This screenshot shows the **My Route** page:

**ORACLE** Search in activities or parts DK

**DK** **My Route** Thursday, March 10th, 2022  
DISNEY, Kathleen

**0: 21 Adjust** **Start**

**A** **ETA 08:00 AM** **>**  
**Cardio Equipment Repair** Issues with  
Exercise Bike Indoor Stationary 10KG  
Rowing Machine for Home use  
Slot **08-10**  
**+12322223125**  
**90 N Orange Ave, Orlando, FL, 32...**

Idle Time: **1:12**

Travel Time 0:09

**B** **ETA 01:00 PM** **>**  
**Cardio Equipment Installation 4**  
Fitness Exercise Bike 2 Senior treadmill  
electric folding treadmill  
Slot **13-15**

**My Route** **62%** **3 Pending**

**Activities** **Add Activity**

**Start Activity** **Parts Cart**

**Parts Ordered** **Inventory**

The tiles are shown in this order:

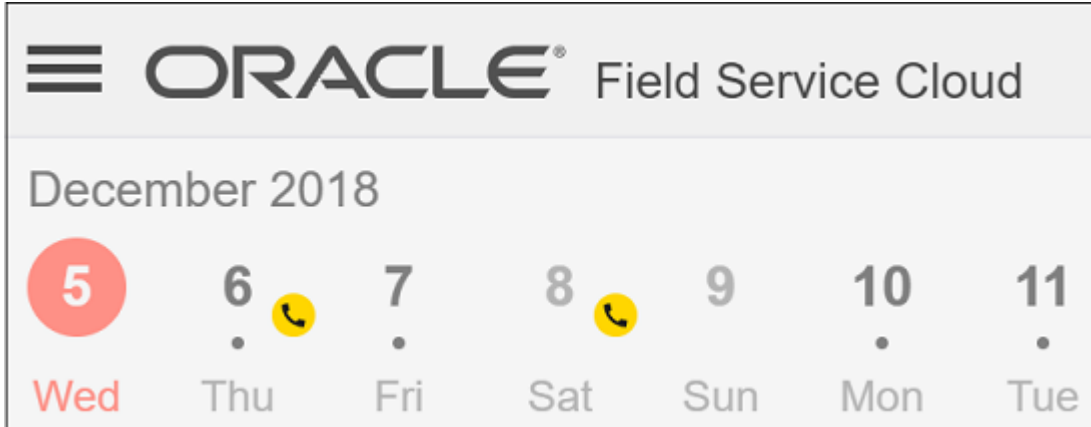
- **Resource Info**
- **Activate/Deactivate/Reactivate Route**
- **Current/Next Activity**
- **Idle Time**
- **My Route**
- **My Team**
- **Activities**

The order of **Assign To Team**, **Inventory**, **Add activity**, **Options**, and **Plug-in** tiles are based on the buttons configured for Activity List.

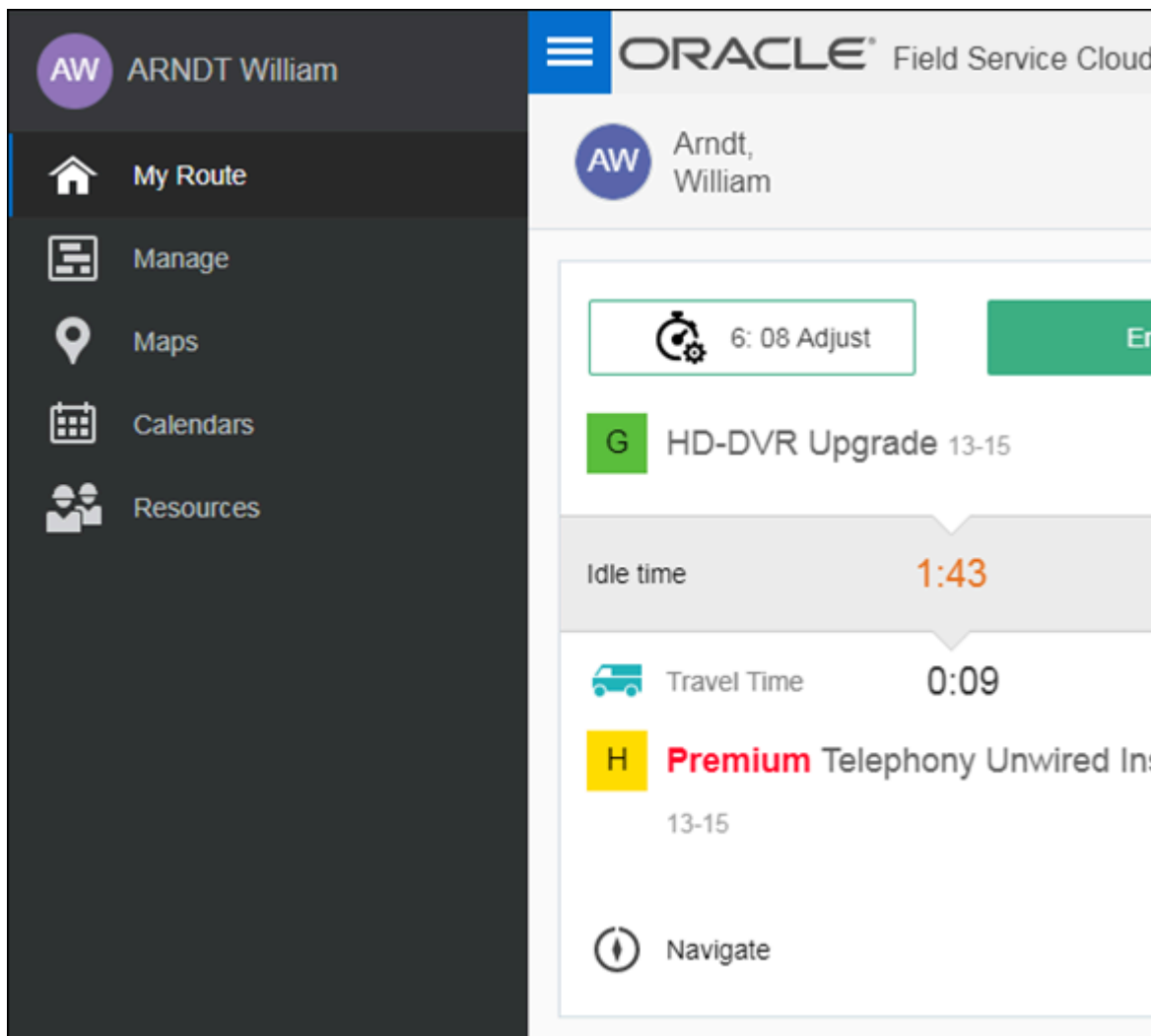
### The Calendar Panel

You can click the date in the header to open the calendar panel appears on the Landing page. This information is displayed for future dates:

- On-call — The phone icon appears if you have an On-call shift on the selected date.
- Workload — A dot appears if you have at least one activity for the specific date. This does not apply for mass repeating activities.
- Non-working day — The date appears gray.



A hamburger menu contains the Main menu items based on the page configurations.



### Offline mode

When you are offline:

- The tiles on the Landing page that are available only in online mode turn gray and you can't click them. You can't click the Resource Info option, but the color remains the same.
- Arrow '>' near the Team holder name is not available and it disappears.
- 'Offline' warning appears in the header.

### Related Topics

- [Access Time View](#)

## Landing Page Dashboard Tiles

The Landing page displays information about a resource's route, activity details, etc.

The landing page has the following dashboard tiles:

- **Resource Info**
- **Activate Route / Deactivate Route / Reactivate Route**
- **Current / Next Activity**
- **Idle Time**
- **My Route**
- **My Team**
- **Activities**
- **Assign to team**
- **Inventory**
- **Add Activity**
- **Options**
- **Plug-in**

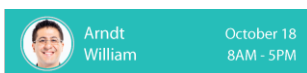
For information on setting up the presentation plug-in tiles on the Dashboard Landing Page, refer to the Mobile Plug-in Framework Guide.

## Resource Info Tile

You can see your personal details on this tile.

This tile includes:

- photo
- name
- current date
- shift start — end time



If your photo is not available (for example, the photo is not uploaded or you are offline), your initials are displayed instead.

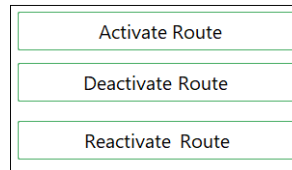
You can click this tile to open the **Resource Info** page, if your administrator has added Resource Info to the **Activity List** Context layout structure. If the option is not added, you cannot click the tile.

You can click the date on the Resource Info tile to access the **Resource Calendar** page.

## Route Activation Tiles

You can activate, deactivate, or reactivate your route from this tile.

You can see the 'Activate Route', 'Deactivate route', and 'Reactivate route' tiles only if your administrator has configured the corresponding buttons on the **Activity List** Context layout structure.



You can see only one of these tiles at a time based on these conditions:

- **Activate Route**

You can find this tile after the Resource Info tile and it links to the **Activate Route** page. You can notice the expected departure time mentioned next to 'Activate by', which indicates that you must activate your route at that time.



You can see this information for the current day until you activate your route. After you activate your route, you cannot see the 'Activate by' text on the Activate Route tile. The color of the tile turns green when the shift start time is passed. You can consider the displayed time as Route activation time, when:

- The travel time is estimated before the shift start time.
- The travel time starts at the shift start time.
- The ETA (expected time of arrival) of the first activity is same as the shift start time.
- The idle time is before the start of travel.

Other than **Activate by**, you can also sometimes notice the **Leave by** and **Arrive by** information on the Resource tile. Let us understand when this information is shown:

- Leave by (suggested departure time) — This information is shown when the Travel start time estimated is before the shift start time or when the travel starts at the shift start time.
- Arrive by — This information is shown when the first activity's ETA is same as the shift start time.
- Activate by (shift start time) — This information is shown when the your idle time is between the start of the shift time and the start of travel time.

**Note:** The Travel time is based on estimated travel statistics.

- **Deactivate Route**

You can view this only if you have activated your route and there are no started and pending activities in your route. The tile displays the shift end details and links to the **Deactivate Route** page. The tile disappears when you submit the route deactivation time. The color of the tile turns Green when the shift end time is passed.

- **Reactivate Route**

You can view this tile if your route is deactivated. The tile links to the **Reactivate Route** page. When you submit the route reactivation time, the tile is replaced with Deactivate Route.

## Current and Next Activity Tiles

You can see the actual state of your route on this tile.

The number of activities displayed in the current and next activities tile depends on the number you have entered for the **Mobile Activity Count** setting on the **User options** page. If there are more activities than the configured number, **View more** is available. Filters restricting the visibility of activities may reduce the maximum number of activities displayed here. The current and next activities tile shows this information:

- **Started activity**
- **Next activity**
- **Travel time to next activity**

**Started activity:** The current activity you are supposed to proceed with at the moment. The tile contains these elements:

- **Square block with a letter:** The color of the block depends on the activity type and status. If the activity address is not resolved, the block is empty.
- **Activity identifier:** The list of activity properties that are configured on the **Identify activity by** page.

**Note:** By default, all the properties are displayed in a single line. To display each property in separate rows, "End of line" markers can be used when configuring Identify activity by screen.

- **Arrow:** Links to the **Activity details** page for that activity.
- **Adjust:** The countdown with the projected activity duration. Click **Adjust** to update the projected duration. The button turns red when less than 5 minutes to activity end is left.
- **Complete:** Links to the **End activity** page.

**Travel time:** This is displayed only when you are moving to the next pending activity in the route. It contains these elements:

- **Adjust:** The countdown with the projected duration of travel time. Click **Adjust** to update the projected duration. The button turns red when the travel end time has passed.
- **Start:** Links to the **Start Activity** page.



**Next activity:** Displays the activity which is the next in the route but is not started yet. The tile contains these elements:

- **Square block with a letter:** The color of the block depends on the activity type and status. If the activity address is not resolved, the block is empty.
- **Activity identifier:** The list of activity properties configured on the **Identify activity by** page.

**Note:** By default, all properties are displayed in a single line. To display each property in separate rows, "End of line" markers can be used when configuring Identify Activity by screen.

- **Arrow:** Links to the **Activity Details** page for that activity.
- **Navigate:** Opens the device native application to show the activity location. The button is displayed if: the **Navigate** button is configured on the **Activity Details** page AND the activity address is resolved.
- **Call:** Calls a number on a phone-capable device. It is displayed if:  
The Customer phone (cphone) property is configured on the **Activity Details** page and the customer phone property is not empty.

## Idle Time Tile

You can view your idle time in a separate tile, Idle Time.

The idle time may occur:

- Before the next activity in the route
- Between the current activity and the next activity
- After the last activity in the route

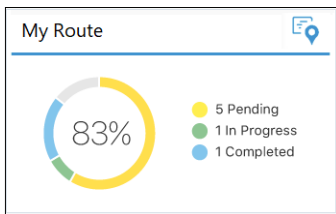
Idle time is calculated as the time period between the end of one activity (projected or actual) and the beginning of travel to another activity. So, if one activity is expected to end at 9 AM, the next activity is scheduled for 11 AM, and the projected travel time between the activities is 30 minutes, the idle time is one hour and thirty minutes.

## What information can I see on the My Route tile?

The information you see on the My Route tile depends on the width of your device screen. A wide screen device shows more information.

### Wide screens

The My Route tile for wide screen contains the Workload bar with the percent of resource work time load for the selected day.



The percentage of workload is calculated using the formula:  $\text{Load} = (\text{Duration}/\text{Shift}) * 100\%$ , where:

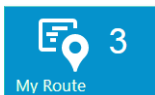
Duration is the time taken to complete an activity, which is = duration of the activity + travel time

Shift is the duration of the shift in minutes.

The Workload is grouped based on these activity statuses:

- Pending
- Started
- Completed
- Suspended
- Not Done

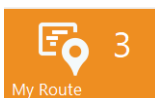
On a narrow screen device, you see the total number of activities in the route for the selected day.



The tile redirects to the **Route Map** page if your administrator has configured the **Map** action link on the **Activity List** Context layout page.

This tile is always displayed even if there are no activities in your route.

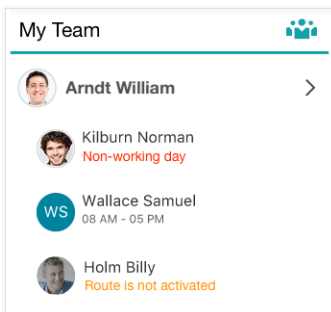
If an activity is in jeopardy (for example, Missing SLA window), the tile turns orange.



## My Team Tile

On the My Team tile, you can see the information about all the teams that you contribute to for the selected day.

This information is displayed only if you assist or are assisted by other resource for the selected day.



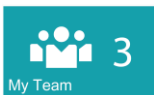
The team holder's name is displayed first in the list and is marked in bold. The arrow links to the Dashboard of the team holder. If you are the team-holder, the arrow does not appear. Team members are listed further. Different teams are separated with a horizontal divider.

These notifications may be displayed under the resource name:

- Non-working day
- Route is not activated
- Shift start-end — When the resource shift differs from shift of current resource.

Of these notifications, you can see only one item, based on the order of the items ('Non-working day' is the highest).

Tile for a narrow screen device shows the total number of resources in all the resource teams. Click or tap this tile to open a separate window with the team details.



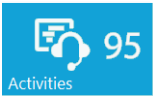
If there are any warnings (when a team member has 'Non-working day' or 'Route is not activated'), the tile turns orange and the number of warnings is displayed on a small tile.



## Activities Tile

You can see the number of non-scheduled activities on this tile.

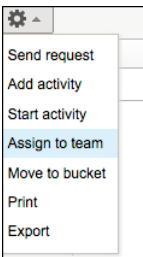
Click this tile to open the **Activity List** page.



## Assign to Team Tile

You can see the activities that can be assigned to a team on this tile.

This tile is displayed if your administrator has configured the `create_teamwork` button on the **Activity List** Context layout structure.



## Inventory Tile

You can use this tile to navigate to the **Inventory** page.

Inventory tile is displayed if your administrator has configured the `list_queue_inventories` button on the **Activity List** Context layout structure.

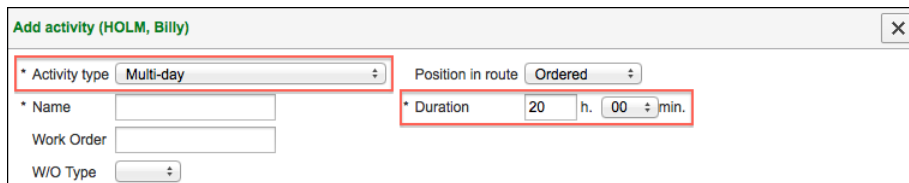


The color of the tile turns orange, if there are any **Started** or **Pending** activities with missing required inventories. In this case you see the missing number of inventories.

## Add Activity Tile

You can use this tile to navigate to the **Add Activity** page.

This tile is displayed if your administrator has configured the add\_activity button on the **Activity List** Context layout structure.



## Options Tile

You can use this tile to navigate to the **Options** page.

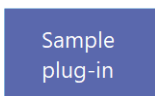
This tile is displayed if your administrator has configured the **Options** button on the **Activity List** Context layout structure.



## Sample Plug-In Tile

You can open any plug-in that is configured for your organization. The Plug-In tile can contain the plug-in name or an icon, and it's color can be changed as well.

A separate tile is displayed for each plug-in that your administrator has configured as a button on the **Activity List** Context layout structure.



## Custom Forms on the Landing Page

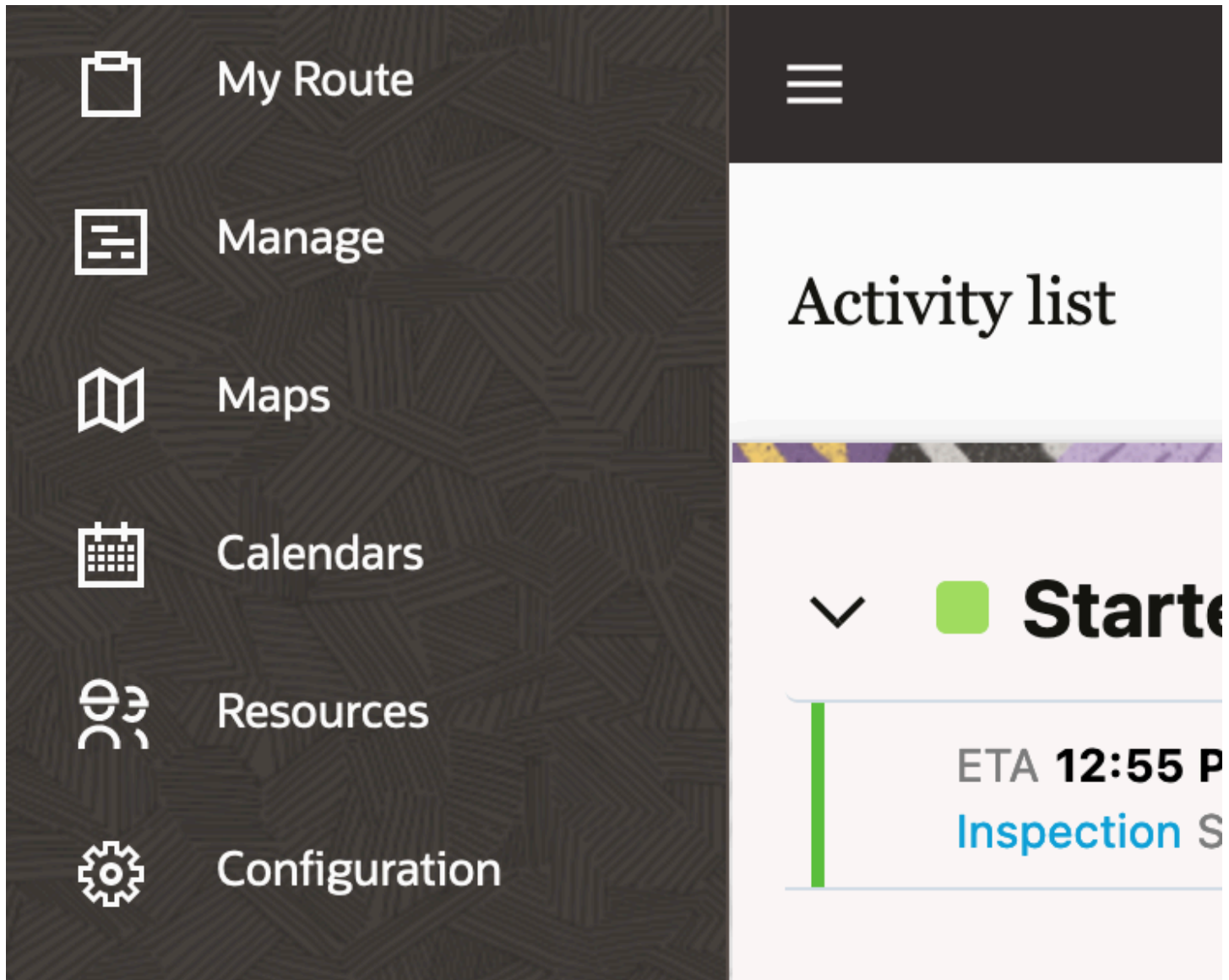
You can view custom Forms on the Landing page and can navigate to them quickly. Examples of custom forms are vehicle or safety inspection details and expense reports.

You can see the custom forms if your administrator has configured forms on the **Activity List** context layout structure. If multiple forms are configured, each form is presented on a separate tile on the Landing Page. Tiles contain the action link name and a pre-defined icon.

## Main Menu


Typically, for field resources, the Main Menu provides access to the Maps, Calendars, and My Route pages. The About and Preferences options also appear in the Main menu on small screen devices.











Your administrator configures the Main Menu and includes links to pages that are required for your business. If you open the Main Menu and click **My Route**, then either **My Route** or **Activity List** is opened. This depends on how your administrator configures the **Field Resource Landing Page** setting on the **Configuration > Preferences** page. This screenshot shows a typical Main Menu:



## Activity Color Codes

Activities that display are classified by color, providing you with a quick view of the status of the day's schedule. Your organization chooses the color codes during implementation to suit the colors you prefer.

Color Code	Activity Status
 Color: Yellow; Hex: FFDE00	Pending activity (on time)

Color Code	Activity Status
 Color: Pink; Hex: FFAAAA	Pending activity (in jeopardy of being late)
 Color: Light Orange; Hex: FFCC99	Not ordered activity
 Color: Lime Green; Hex: CCFF00	Pending internal activity or teamwork
 Color: Green; Hex: 5DBE3F	Started activity or teamwork
 Color: Blue; Hex: 79B6EB	Ended activity
 Color: Electric blue; Hex: 99FFFF	Suspended or cancelled activity or teamwork
 Color: Humming Bird; Hex: COFFEE	Travel time
 Color: Gray; Hex: CCCCCC	Ended activity
 Color: Turquoise; Hex: 60CECE	Not done activity
	Pre-work, or re-opened activity

## Notifications in the Collaboration Window

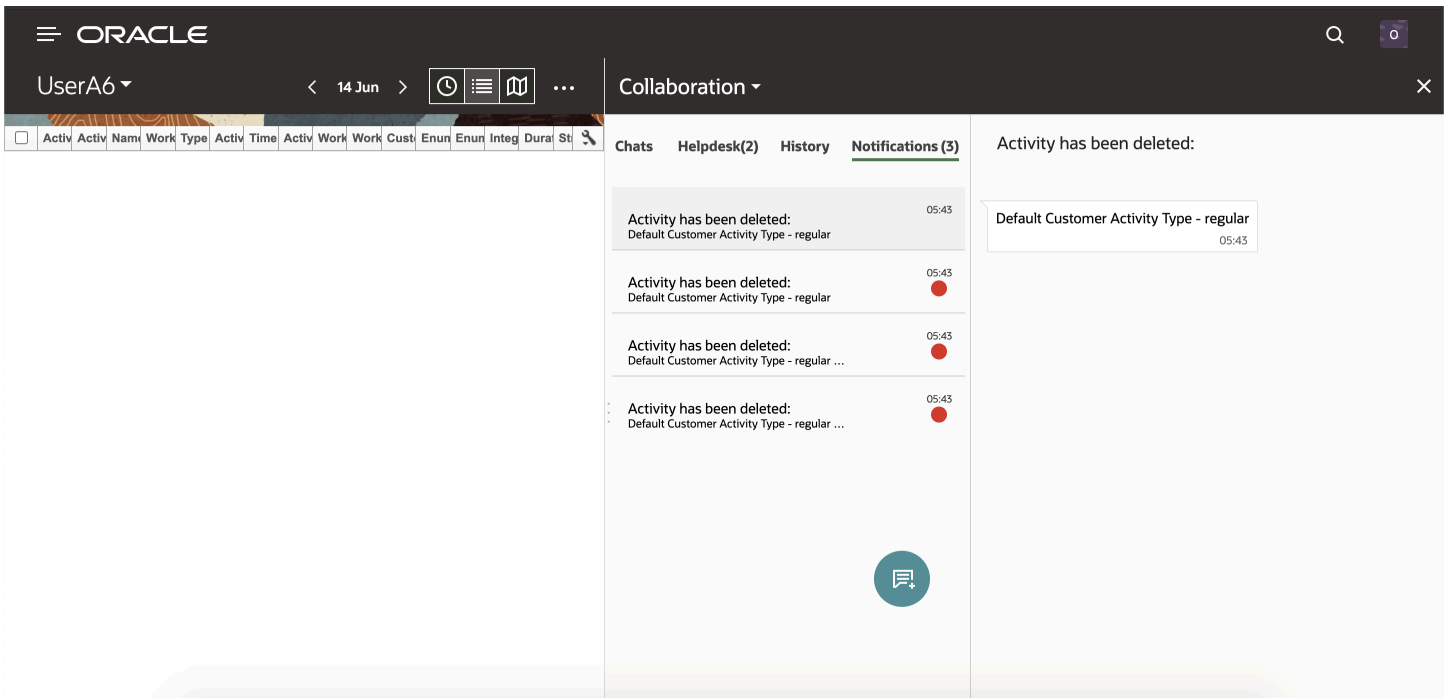
You can view the notifications such as activity and location alerts, help desk chats in the **Collaboration** window. All the notifications are consolidated in one area under the chat icon in the header. This consolidation makes it easier for you to manage your read and unread messages.

If your user type is not configured with Collaboration, you can still get the notifications under the same icon. However, you cannot see the Collaboration features such as chats, helpdesk chats, and historical messages. Instead of the **Collaboration** window, you see the **Notifications** window and it lists all the available notifications.

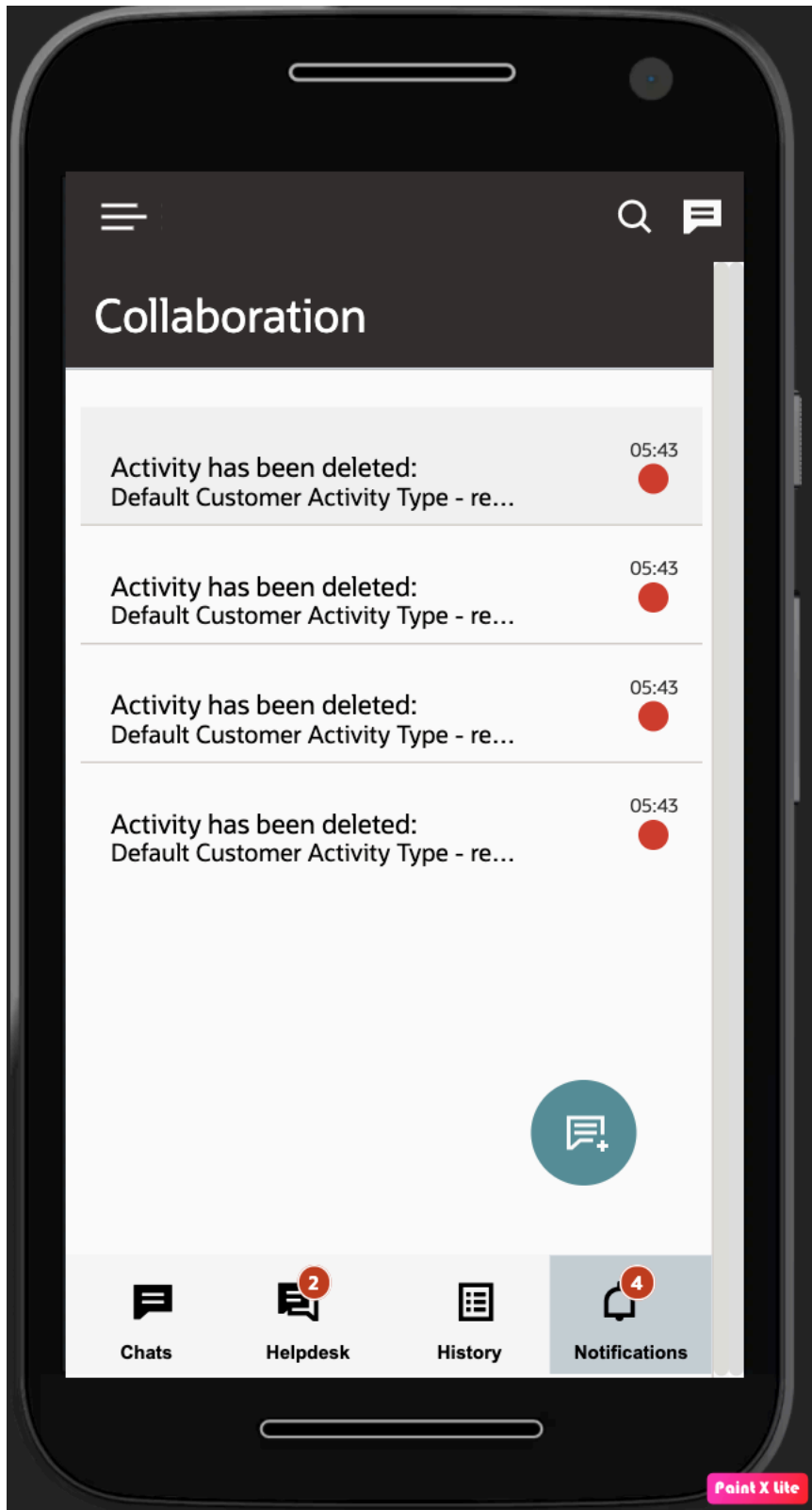
**Note:** The notification messages are available on the **Notification** tab for an active session. The messages disappear if you refresh the page. If you log in to the application again, you will get new notifications as part of the new active session.



This screenshot shows the Notifications tab in the Collaboration window, as seen in a browser:



This screenshot shows the Collaboration window with the Notifications tab in the installed app:



These are the features of notifications:

- You can see the Notification tab only when you activate your route.
- Supervisors, dispatchers, or admin users who manage multiple users can see the notifications of their teams, when the manager (user) views the Activity List of a resource, only when the technician's route is activated.
- The Notifications displays the count of unread notifications.
- The left pane of the Collaboration window contains the notification title, the time of arrival of the notification, and a colored dot to indicate unread notifications.
- The right pane of the Notification tab contains the details about the notification with a header as the title of the notification.
- The Collaboration icon shown in the header shows the sum of all unread chats and notifications when Collaboration is not open on the page.
- Each notification appears as an individual item within the Notification tab.

If you are using the native application in Android devices, you can get the Collaboration notifications even when the app is running in the foreground. That way, you get the new Collaboration notifications on any page within the Oracle Field Service app. You can click **Back** from the Collaboration chat list page and navigate back to the previous Oracle Field Service page from where you had opened Collaboration. If you are in the detail pages of Collaboration, you are navigated back to the previous page.

In-app notifications are notifications that are sent to the user, while the user is using the app in the foreground. Note these points:

- In-app notifications are not available on iOS devices.
- In-app notifications are not available when you are working within the Collaboration pages.
- In-app notifications include all activity and location alerts that are displayed in the **Notifications** tab within Collaboration. Further, they also include all Collaboration related notifications such as new message, broadcast, helpdesk, group messages, and message scenarios.

## How do I configure my display preferences?

You can change some display options to suit how you work and how you prefer to view information.

Depending on your company's configuration and your user type, display options might differ.

**1.** Click the menu icon and then click **Preferences**.

The **Preferences** page displays.

**2.** Complete these fields:

- **Language:** The language you want to use.
- **Time format:** Either 12- or 24-hour mode. This affects an activity's start and end times.
- **Date format:** The date format you want to use.
- **Mobile Activity Count:** The number of activities that's displayed on the landing page and in the activities list. The number of activities displayed on the landing page includes the activities in Started and Pending statuses. The default number is 5. If there are more activities than the configured number, **View more** is displayed. Filters restricting the visibility of activities may reduce the maximum number of activities displayed on the landing page and the activity list. If you don't see this field (which means if the field isn't

added to the **Preferences** page by your administrator), the number of activities you see on the landing page is based on the number defined for the **Number of activities per page** field on the **Configuration > Display** page. Further, if you set the value for this field and then the field is removed from the page, Oracle Field Service still uses the value you'd set before the field was removed.

- **Mobile Inventory Count:** The number of inventory items you want to see on each page.
- **Design Theme:** The way you want your mobile application to look. You've two options:
  - Classic theme: The classic style theme displays tabs with text.
  - Vanilla theme: The Vanilla theme displays icons in the header region for the most frequently accessed screens. It has a menu to the left of the screen, which provides access to the remaining screens.
- **Photo:** Your photo.

**3. Click **Submit**.**

The amount of information will not change, only the way in which it displays on your screen changes.

## Change Your Password

Depending on the configured login policy, you can change your password from your home page.

- 1. Click the hamburger icon and then click **Settings**.**  
The **User options** page displays.
- 2. Click **Change Password**.**  
The **Change Password** page displays.
- 3. Enter your old password, and then your new password twice.**  
Ensure that your new password complies with your company's password rules.
- 4. Click **Submit**.**

### *Related Topics*

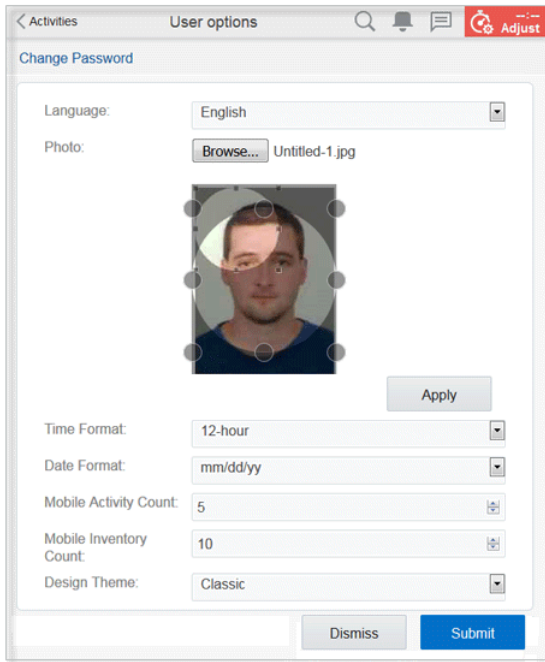
- [How do I create and use a PIN?](#)

## Assign an Avatar

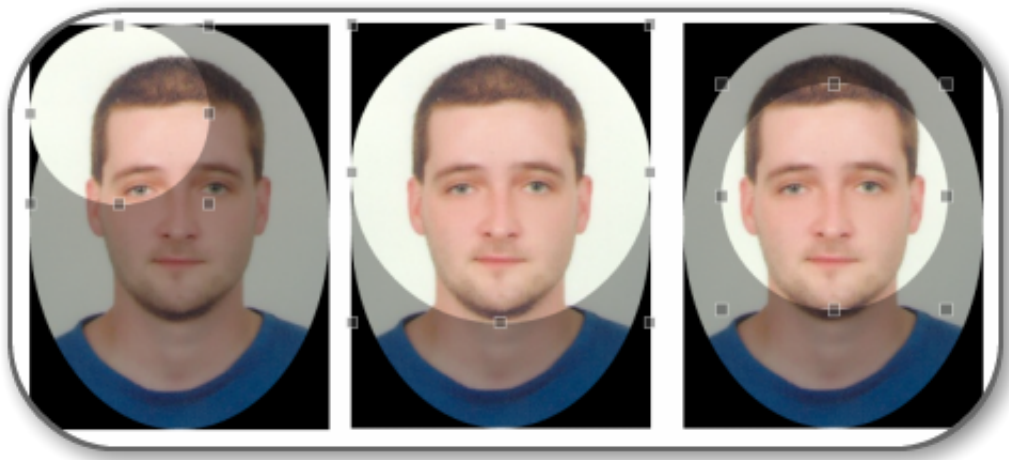
You can upload a photo for the user for which you are currently logged in. Resources without images have their initials with the background colors displayed as avatars.

- 1. Click the menu icon and then click **Preferences**.**
- 2. On the **Preferences** page, locate Photo and tap **Add Image**.**

3. Browse and select the photo that you want to upload.  
The photo you select is displayed on the **User options** page in the edit mode.



4. Drag the edges of the round crop tool to resize and move the area of the photo that you want to select.



5. Tap **Apply**.
6. Tap **Submit**.  
The photo is saved.

## Remove an Avatar

You can remove the photo for the user for which you are currently logged in. Resources without images have their initials with the background colors displayed as avatars.

1. Click the hamburger icon and then click **Preferences**.
2. On the **Preferences** page, locate **Photo** and tap x.
3. Tap **Submit**.  
The photo is removed and the initials of the resource appear.
4. To download the photo, tap the **Download** icon.

**Note:** You must first remove an existing photo and then click **Add Image** to upload a new photo.

## Workflows

### Overview of Workflows

A workflow helps you visualize the flow of steps while performing an activity. It guides you through your work, and lets you see what steps are completed and what steps remain to be completed. While workflows help you perform all the steps without missing anything, it helps organizations onboard the mobile workforce quickly. Workflows also provide a new kind of audit for dispatchers and managers; they can easily identify how technicians are moving through their activities. Workflows are supported for all type of activities, for example, regular activities, mass and repeating activities, segmentable activities, and team work.

**Note:** You cannot change the workflow after a resource starts an activity.

Workflows help organizations enforce compliance in various ways. For example:

- Your corporate compliance requires the mandatory completion of a form. Forms dealing with COVID19 are a great example of this type of compliance.
- Safety compliance requires you to fill in a security or safety form before starting an activity.

#### How does a Workflow Work?

Oracle Field Service calculates the activity workflows dynamically, based on the workflow conditions that are defined on the **Workflow Manager** page. A workflow is displayed on a panel on the **Activity Details** page. You must click the steps available in the workflow panel, enter applicable data, and submit the steps.

#### Workflows for Segmentable Activities

All segments of a segmentable activity must be associated with a single workflow. It's not possible to associate different segments with different workflows. The segments inherit the workflow from the master activity.

## Workflows in Offline Mode

Workflows are supported in offline mode; there is no difference in their functionality whether the application is online or offline.

Be aware of these points:

- All the workflows for the day are loaded for offline usage.
- Visibility conditions, dynamic calculations, default and validation rules are supported.
- Plug-ins added as workflow steps must support offline work. The steps for plug-ins that do not support offline mode are disabled in offline mode.

## Workflow Step Counter

A counter of steps is displayed on the workflow panel.

This counter helps you see how many steps are there in the workflow and how many of them are completed. For example, if the counter shows 'Steps 2/7', it means that you can see a total of seven steps, and you have completed two of them.

The counter shows the total number of steps that are visible on the page, but it doesn't necessarily mean that those are the only steps that are configured for a workflow. The reason for that is that the availability of steps is driven by the data collected in the field, and the application cannot predict which of the steps is visible and which is displayed.

## Workflow Panel on Large and Small Screens

The application allocates limited space to show the workflow panel and in some cases, not all of the steps fit within the panel's height or width. When that happens, you can scroll inside the panel and access any steps that are located on either side of the page.

The workflow panel is displayed horizontally on large screens such as desktops, laptops, and tablets. In the landscape orientation, you can scroll the workflow panel from left to right. The panel can contain up to seven steps.

The workflow panel is displayed vertically in the portrait orientation. In portrait orientation, the workflow panel behaves the same way as all other sections on the page. On small screens devices, the panel is displayed vertically and shows up to five steps upfront. If the panel's height doesn't take up more than 50% of the screen height, then three steps are displayed. If there are more than three steps, you can scroll inside the panel to access the other steps.

## Complete the Workflow Steps

You can complete the workflow steps as you move through an activity—you can open the steps, collect data, and submit the steps. You have to complete the steps in the order enforced by the configuration of a workflow; the conditions of the steps influence when the steps become available or completed.

The workflow panel displays the steps that match the configured conditions:

- An *available* step shows with a *circle* icon. Tap this icon and the page where you must enter data is displayed.
- A *completed* step shows with a green tick inside the circle. Completed steps are shown as part of the workflows.
- Sometimes, some completed steps may not be available for modification. Such steps are displayed with a green tick and the step name is disabled. You can only see this step, but cannot click it.
- A step that is not completed and doesn't match the configured conditions does not appear on the workflow panel.

The workflow panel shows your custom themes, if any. The color depends on the color you have selected as the background for the header. For dark themes, the panel is displayed in the default color, and for light themes, the background of panel is white.

### Workflow for Activities in Final Statuses

The workflow remains displayed for activities in the final statuses, such as Completed and Not Done. There is no difference in the visualization of the workflow panel or the steps for activities in these statuses. Availability of steps here is determined by the way the step is configured.

### Positioning of Steps

The positioning of steps within the workflow panel is as follows:

- The first available not completed step is always visible.
- The completed step preceding the first available not completed step also is visible, if there is one.
- When all the steps are completed, the position points to the last step of the workflow.
- The application recognizes any connections to steps that aren't visible and demonstrates that there are more steps in the workflow, than what's displayed on the panel. When you navigate to the activity, the page automatically scrolls to the next available workflow step to make it easy to distinguish.

### Can other resources complete the steps for you?

Yes, in these ways:

- Dispatchers and managers can complete the steps through the user interface.
- API calls or message scenarios can complete the steps in the background. This works for steps where the **Show completed when** conditions are based on field and custom property values.

## Activities

### Manage Page Availability

The **Manage** (time view) page displays the resources in the selected group. Resources are listed alphabetically, together with their routes. The activities in the routes are displayed as bars that are color-coded according to their status. Travel time, idle time, and their duration, are also shown.



The **Manage** page is displayed based on these rules:

- The **Manage** page is not available if it is not added to the **Main** menu and the technician can see only themselves.
- The **Manage** page becomes available, if a bucket is visible for a technician. In this case, all the resources of this bucket with their routes are visible to the technician.
- If the **Self-Assignment** option is selected for a technician, then the **Manage** page is still available, but without access to any resources of the visible bucket.

## Before You Work with Route Activities

Most of the work you do in the application involve activities.

You can do any of these with activities on your route:

- View
- View and add *activity* details
- Start and complete
- Add time to an activity
- Assign *status*
- Reschedule
- Suspend
- Mark an activity as Not Done

You can use the **Nearby Activities** page to view unrouted activities, either in a list or on a map. Depending on your user type, you might also be able to move the unrouted activities to your route.

### *Related Topics*

- [Find Nearby Activities](#)

## Non-Travel Activities

When an activity does not require travel (that is, you have cleared the **Calculate travel** check box for the Activity type), the idle time before that activity is considered as travel to the next activity that requires travel in the route.

You can split the travel between activities into two (or more) pieces by inserting non-travel activities in between. As a result, in Time View, non-travel activities are placed over the travel time for activities that require travel. A non-travel activity may have a different location when compared to the previous travel-required activity (or provider start location), if a non-travel activity is placed over a travel-required activity.

To understand the concept better, let's consider this sequence of activities:

- First activity: For example, installation requires travelling, ends at 10:00
- Second activity: For example, phone call doesn't require travelling starts at 17:00 and ends at 17:10
- Third activity: For example, upgrade requires travelling; service window starts at 17:30 and ends at 18:00

Assume that the travel time between First activity and Third activity is 3 hours. The time line would be:

Time	Action
10:00	First activity is finished
10:00 to 14:20	Idle time
14:20 to 17:00	Travel toward third activity
17:00 to 17:10	Second activity (phone call)
17:10 to 17:30	Continue travel toward third activity
17:30	Third activity started without any overdue and as early as the service window allows

**Note:** When you place a non-travel activity manually on a time interval that is occupied by the travel bar of a non-movable (for example, due to service window) travel-required activity, the travel bar can be partially placed before the actual time. In this case, the best practice would be that you move the non-travel activity to another place in the route.

## Get Driving Directions in Navigate

You can use the Navigate option to get the driving directions for a selected activity.

You can use the **Navigate** option on the **Activity Details** page to use the navigation apps on your mobile device such as Google Maps that are configured by your administrator.

**Note:** The **Navigate** option is visible in the **Activity Details** page only if it is configured in the **Action Management** section.

## Get Driving Directions for an Activity

You can get the driving directions for a selected activity using the **Navigate** option.

1. Log in from your mobile device.
2. Open the required activity from the list.
3. Click **Actions** and the click **Navigate**.

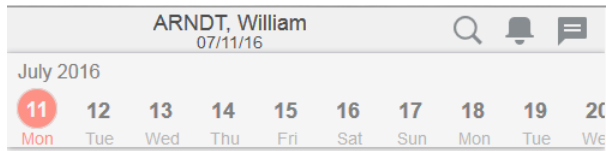
The Navigation app that is configured for your organization opens the directions for the selected activity location.

## View Activities

The activities listed on your home page are grouped by status. *Started* activities are displayed at the top of the page, *Pending* activities in the middle, and closed activities (those that have been *Completed*) at the bottom.

Pending activities appear in chronological order. Tap the up and down arrows to expand or collapse the sections.

You can view activities scheduled for another day by tapping the date under your name, dragging the calendar to the left or right, and then tapping the desired day.



If you are missing any of the inventory required to complete an activity on your route, the application notifies you immediately, in red **Missing required inventory** text. This notice prevents you from showing up empty handed at a customer's location. Open the **Activity details** page and arrange to pick the inventory up before you travel to the customer's location.

#### Related Topics

- [View Activity Details](#)

## Estimate Travel Time Using Real-Time Data

The travel time for resources using Oracle Field Service Core Application or Oracle Field Service Mobile for Android and iOS is updated using real-time traffic data from the configured map provider. You can use this feature only if you are signed in with your resource credentials. It is not applicable when you navigate to routes of other resources.

**Note:** The application can estimate the travel time using real-time data only if you have subscribed to Oracle Field Service Enterprise when using Oracle Field Service Standard Map Cloud Service with Google Maps or Baidu Maps.

The real-time traffic data is used to update the travel time to activities in your route for the current day, during one of these actions:

- When you activate the route, that is, when you update travel time to the first activity in a route. When you activate the route from Oracle Field Service Core Application or Oracle Field Service Mobile for Android and iOS, the real-time travel data from the map data provider (for example, Google Maps) is used to update travel time to the first activity in your route for the current day. The travel time is updated, if these conditions are true:
  - Your first activity has resolved coordinates with an accuracy level 0 – provided by an external application, 8 – “intersection” or 9 – “address”.
  - You have selected **Calculate travel** on the **Configuration > Activity Types > Add activity types or Modify activity types**, Features section for this type of activity.
  - Your travel time to the first activity is totally or partially included into the working time for the current resource type (**Configuration > Resource Types > Add resource type or Modify resource type**, Travel Allowance section).

**Note:** If the geolocation is gathered by your device at the last minute, then it is used as the starting point of travel. If the geolocation is not gathered, then the Start Location coordinates are used. The Start Location is used, if the resource's start location is defined and the coordinates are available. Otherwise, the travel time is not updated.

- When you activate the route, that is, when you update travel time between activities in a route. When you activate the route from Oracle Field Service Core Application or Oracle Field Service Mobile for Android and iOS, the real-time travel data from the map data provider (for example, Google Maps) is used to update the travel time between ordered activities that is, between the first and second activity, second and third activity, on the current day route. To use this option while activating the route, these conditions must be satisfied:
  - The previous and next activities include geo-coordinates with an accuracy level 0 – provided by an external application, 8 – “intersection” or 9 – “address”.
  - **Calculate Travel** is selected for the next activity. To set this parameter, navigate to **Configuration > Activity Types > Add activity types or Modify**, Features section.
- When you complete an activity, that is, when you update travel time to the next activity in a route. When you complete an activity using Oracle Field Service Core Application or the Oracle Field Service Mobile for Android and iOS, the real-time travel data from the map data provider (for example, Google Maps) is used to update the travel time to the next activity on the route. To use this option after completing the activity, these conditions must be satisfied:
  - **Calculate Travel** must be selected for the activity type of the next activity in the Features section on the Add activity type or Modify activity type page. To navigate to this page, click **Configuration > Activity Types > Add activity types or Modify**.
  - The next activity has resolved coordinates with an accuracy level 0 – provided by an external application, 8 – “intersection” or 9 – “address”.
  - The current resource position (gathered by your device) is used as the starting point of travel. If the resource’s geolocation is not gathered during the last minute, the coordinates of the current activity are used as the starting point of travel (if available and the accuracy level is 0, 8, or 9). Otherwise, the travel time is not updated.

**Note:** If the travel time differs from the previously-defined travel duration and the new travel data is available, **Travel Time** on the **End activity** screen displays the real-time travel duration. This is applicable when **Display and allow adjustment of remaining Travel Time** is selected on the **Configuration > User Types > Activity Management** section.

**Note:** Traffic information varies based on the map provider’s data availability, which may not be available in all the countries, areas, states, provinces, and localities. Check the map provider’s website for data availability. When the traffic data is available, the application uses the most recent information available from the map provider, which may not always be the current information.

- When you set the ‘En Route’ status for an activity, that is, when you update the travel time to an activity you are travelling to. When you set the ‘En Route’ status for an activity using Oracle Field Service Core Application or the Oracle Field Service Mobile for Android and iOS, the real-time travel data from the map data provider (for example, Google Maps) is used to update the travel time to this activity. To use this option while setting the ‘En Route’ status, these conditions must be satisfied:
  - ‘En Route’ activity has resolved coordinates with an accuracy level 0 – provided by an external application, 8 – “intersection” or 9 – “address”.
  - Geolocation is gathered by your device at the last minute, it is used as the starting point of travel. If the geolocation is not gathered, then the travel time is not updated.
  - When you set the ‘En Route’ status for another resource, the position is obtained from the Smart Location service. If the geolocation is gathered during the last five minutes, then the travel time is updated.

- **How to enable and disable this feature?**

You can enable this feature by selecting **Use real-time traffic data** from the **Configuration > User Types > Permissions** section.

**Note:** You cannot use this feature if you are a Contingent Worker (**Configuration > Resource Types > Add resource type or Modify resource type**).

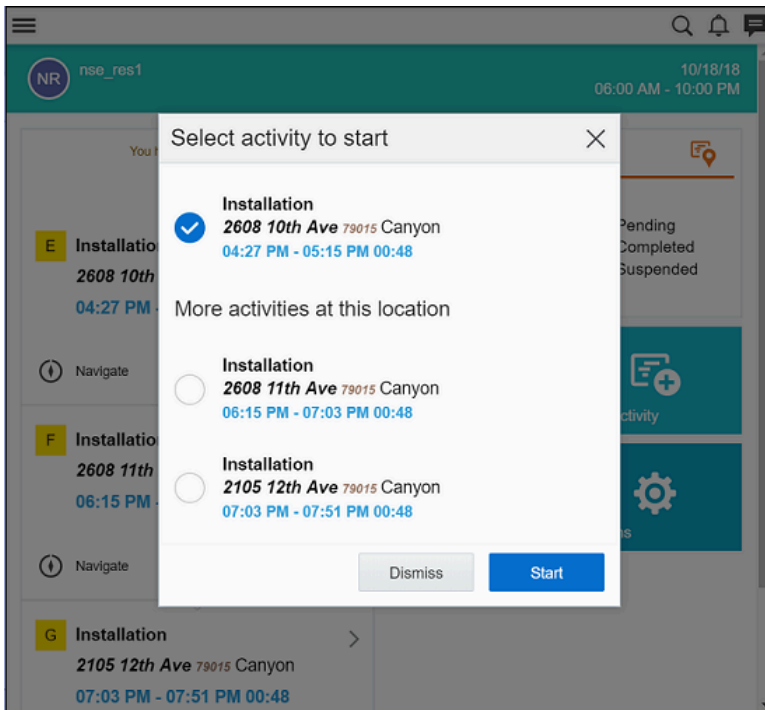
## Select an Activity to Start from Multiple Activities

If you have more than one activity in the same location as your next pending activity, you see the notification 'You have N more activities at this location' above the **Start** button.

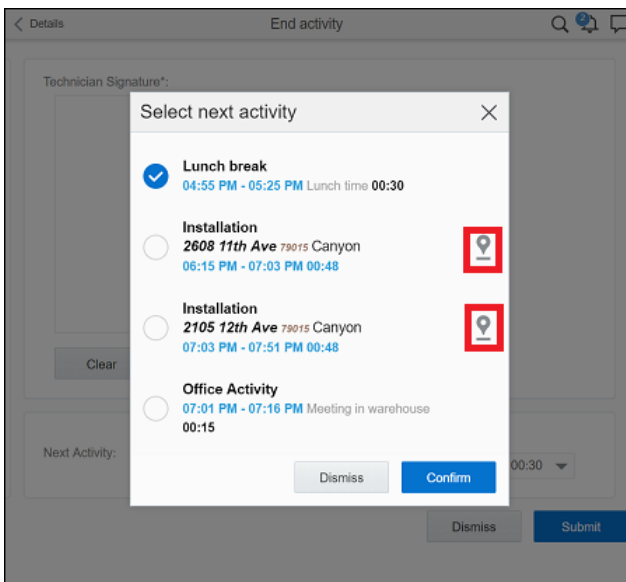
When you click the **Start** button, you get the list of activities placed at the same location. An activity is considered to be in the same location only if the following conditions are true:

- scheduled for the current day
- has resolved coordinates
- has a status of Pending
- must be located in the same location — distance to the next activity must not exceed 'X' meters, where 'X' is the Resource Parameter
- not blocked by other linked activity

By default, you have the first activity selected. You can select any activity placed at the same location from the list and then click **Start**.



When you are about to end an activity, you receive the notification 'You have more activities at this location' on the **End Activity** screen. When selecting the next activity, you can notice that the activities present at the same location are highlighted with a location marker next to them.



You can select any of the listed activities and click **Confirm**.

By default, this option is not available for all the users. Your administrator must enable it from the **Configuration** page.

## Start an Activity

When you arrive at a customer location, you must start the activity in Oracle Field Service from the **My Route** page. The application uses this data to project activity durations, travel time, and distance.

Always start activities as soon as you arrive at the customer's location, even before you get out of your vehicle. If you forget to start an activity on time, contact dispatch so that they can start the activity and enter the correct start time for you.

**Note:** You must always start the scheduled activities in order. This means, you can only start the next activity in the list. Unordered activities are different, they can be started at any time.

1. Open **My Route** and click **Start** for the activity that you want to start.  
A confirmation page displays. By default you start the first pending activity in the route.
2. Select the time of start and click **Submit**.  
The activity status changes to **started**. You can't select a time that's earlier than the current time.

**Note:** After you start an activity, you've the option to adjust time or to change the activity status. Menu options are driven by previous activity actions.

## Work-Progress Countdown Indicator

The work-progress countdown indicator appears on your page after you start an activity, and displays the time remaining until you complete that activity.

Where the indicator appears on your page depends on the mobile device you are using. If your screen width is 540 pixels or more, the indicator displays as a bar across the top. On narrower screens, the indicator displays on the right side of the title bar.



As the time remaining decreases, the color of the indicator changes from green, to yellow, and then to red. You will receive an expiration reminder when the countdown reaches 5 minutes. When the timer runs down to 0 hours and 0 minutes, the time is replaced with two dashes (--) for hours and minutes and the timer remains red.



**Note:** If duration of an activity is set to 5 minutes, the countdown indicator will be red immediately.

You can adjust the time to indicate when you plan to leave the activity site by clicking **Adjust** and selecting the additional time you need to complete the activity. Adjusting the time updates the information that displays in the indicator.

Since the indicator displays on many pages, it still will be visible should you need to navigate away from the **Activity details** page.

## View Activity Details

When you want to know more about an *activity*, you can view the activity details.

The **Activity details** page includes information like customer name, account number, work order type, and primary phone number. Depending on your configuration, this page also includes links to further details about customer contact information and the ability to create a Service Request Order.

**Note:** This page is often configured to closely fit the needs of the business. As a result, your view might differ from the one in this guide.

To open the **Activity details** page, click on an activity on your home page.

## Edit Fields on the Activity Details Page

You can update the values of the editable fields from the **Activity Details** page or tabs within those pages.

**Note:** The **Submit** button displays if the value of at least one of the fields on the page is Read-Write or Mandatory. However, if all the fields on the page are Read-only, then the **Submit** button is not displayed.

The visibility values (such as Read-Write, Mandatory, Read-only) are configured in the Visual Form editor. See the User Types section in the *Administering Oracle Field Service Guide*.

When you try to select a value from a drop-down list (for an enumeration property), the keyboard is displayed to help you search for the value.

If you edit a field on the Activity Details page and you attempt to navigate to a previous page or tap **Dismiss**, then the message, “Your changes were not submitted. Do you want to save a draft of your updates?” is displayed.

- Tap **No** to discard the changes and navigate to the previous page.
- Tap **Yes** to save a draft and navigate to the previous page. See *Restore Partially Filled Pages from Drafts*. When you navigate to the **Activity details** page, click **Restore draft** and make further changes (if required).

If you attempt to click a tab or a button, then the message, “Your changes were not submitted. Do you want to save the changes and proceed to the next screen?” is displayed:

- Tap **No** to navigate back to the **Activity Details** page and retain the edits to the fields.
- Tap **Yes** to save the changes and navigate to the selected tab or button.

**Note:** This does not apply to standard pages such as **End activity** and **Suspend activity**.



## Notifications Panel

The **Notifications** panel notifies you about the route changes or activities that are no longer on your route.

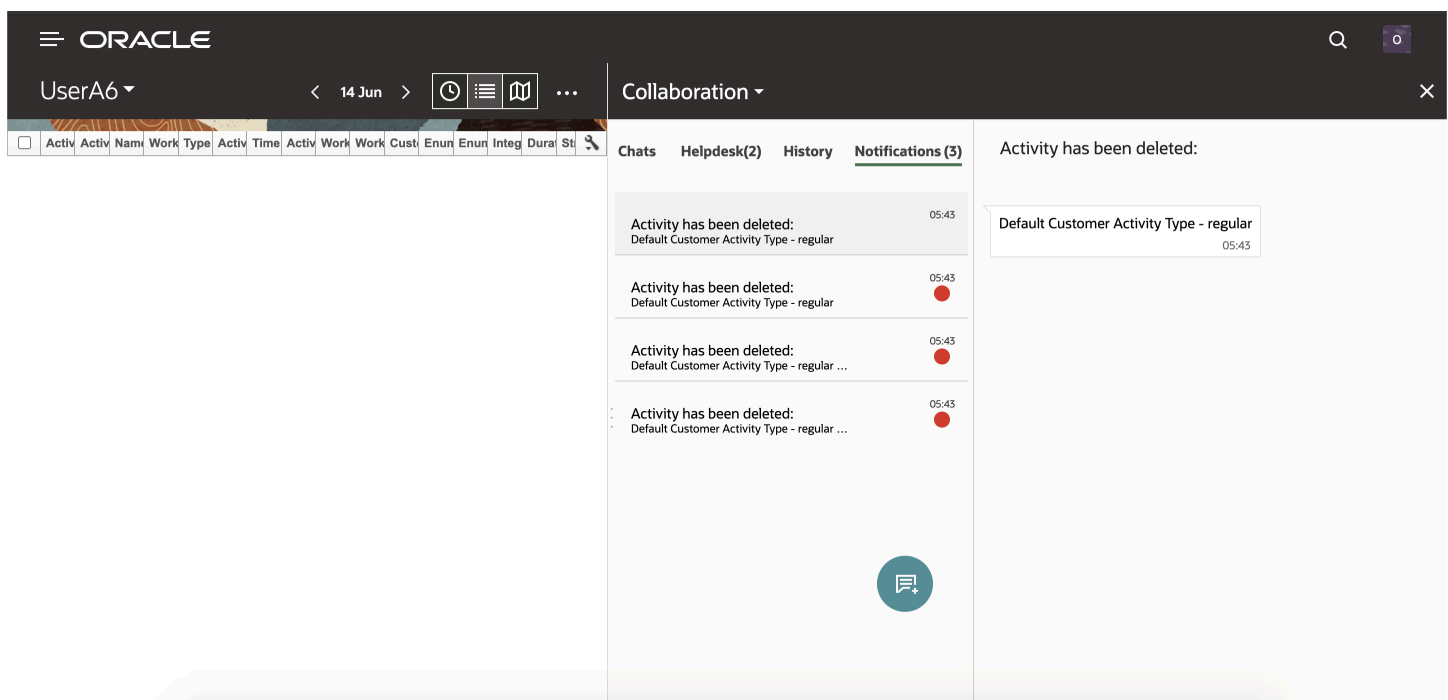
A *notification* can save you time by stopping you from driving to a canceled *activity*. All notifications become available as soon as you activate your *route*, and a bell icon appears on your **Activity details** page.

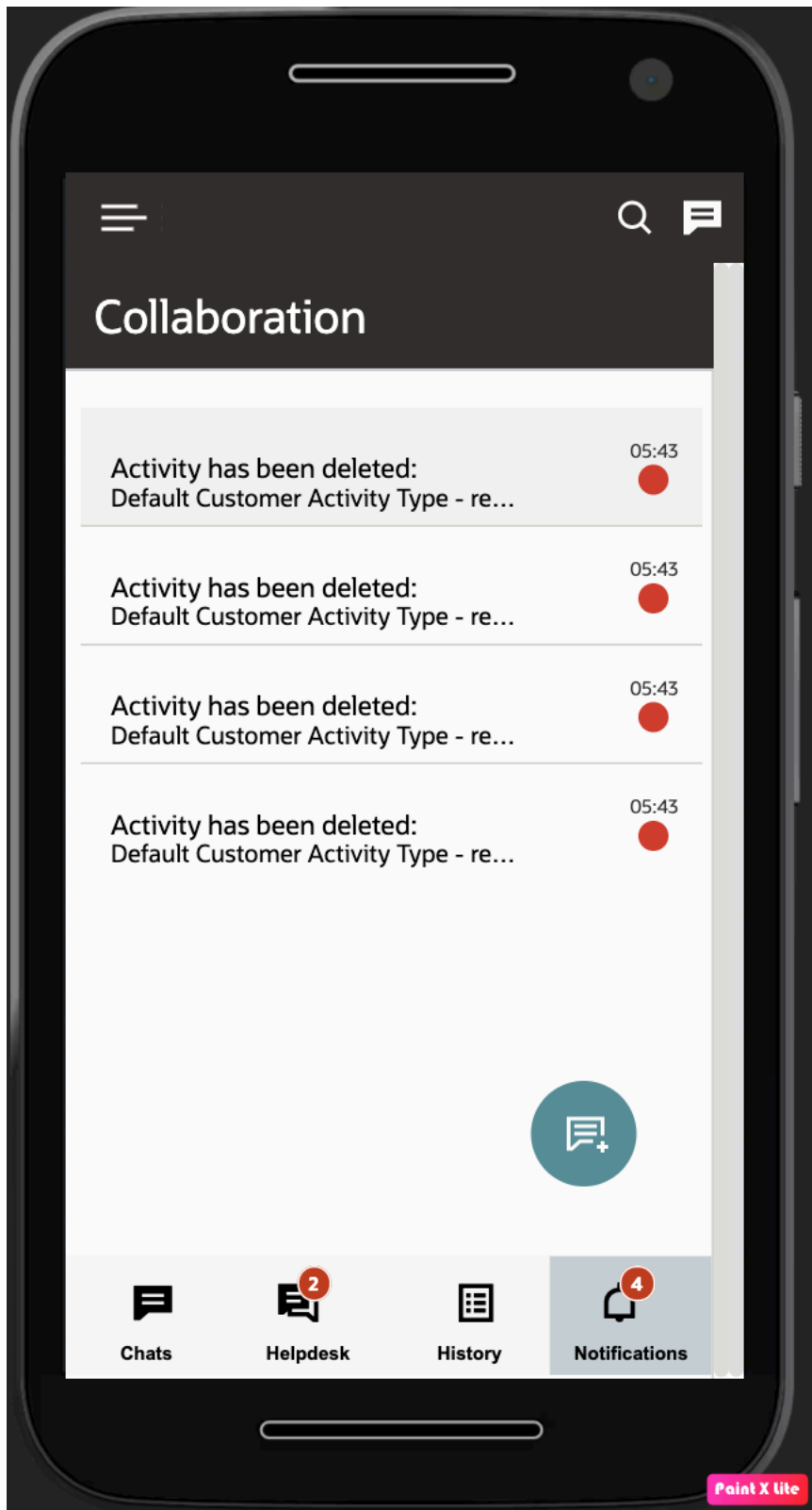
There are three types of notification messages:

- Activity has been added
- Activity has been deleted (that is, when an activity is removed from your route)
- Activity address has been updated

When an activity is added or removed from your route or when the address of an activity on your route changes, a number indicating how many notification messages you have displays on the bell icon.

Clicking the icon opens the **Notifications** panel and shows the notifications, as shown in these screenshots.





When you refresh your browser, messages that are read are not displayed on the page. If you are offline for some time, all notifications accumulated during that time display when you log in again.

Separate address-change notifications contain the updated information (in bold white text), as well as the old (in bold gray text).

You receive this type of notification when any of these information changes:

- Address
- City
- State
- ZIP/Postal code

If an address-change notification is longer than two lines, clicking the ellipsis (...) displays the full text of the message.

#### *Related Topics*

- [Notifications in the Collaboration Window](#)

## View Additional Information about an Activity

Some of the details of your activities are displayed on the home page. If you want to view additional information such as job number, map grid, node ID, and services list, you must open the **Activity details** page.

1. Select an activity from your home page.  
The **Activity details** page displays.
2. Scroll to the bottom of the **Activity details** page and click **Additional Info**.  
Additional information about this activity displays:
3. Click **Details** to return to the **Activity details** page.  
You can also use the 'Pull to Refresh' option, which refreshes the content on your home page.

## View an Activity's History

You can see the same information about the history of an *activity* as the dispatcher/supervisor.

An activity's history displays when you click **History** on the **Activity details** page.

This image shows the activity history as viewed from Oracle Field Service Core Application. The tabbed options at the top of the page vary by configuration. You may not see all these tabs on your page.

Action time	Action	Changes	User
03/30/20 08:45 AM	created	W/O Type: UP Activity type: HD-DVR Upgrade Duration: 00:39 <a href="#">Show more</a>	Admin (admin)
03/30/20 08:45 AM	updated	Coordinate Status: not_found	
03/30/20 08:48 AM	updated	Account Number: 005623109	Admin (admin)
03/30/20 08:50 AM	add activity link	Start after Activity: Cable Upgrade - 401, Island Parkway - 94065	Admin (admin)
03/31/20 02:06 AM	updated	Work Order Class: C Time Slot: 13-15 Service Window: 01:00 PM - 03:00 PM	Admin (admin)
03/31/20 02:06 AM	reordered		Admin (admin)

When viewing the activity history from a mobile device, the page looks something like this:

Action time	Action
02/15/16 02:03 AM	route updated
<b>Activated</b>	<b>03:21 AM</b>
<b>Time Zone</b>	<b>GMT-5</b>
<b>Difference</b>	
<b>Calendar Time from</b>	<b>08:00 AM</b>
<b>Calendar Time to</b>	<b>05:00 PM</b>
Action time	02/15/16 02:03 AM
Action	updated
<b>Time Notified</b>	<b>10:00 AM - 11:15 AM</b>
<b>Time Zone</b>	<b>GMT-5</b>
<b>Difference</b>	
Action time	02/15/16 11:48 AM

## Add an Internal Activity

For Oracle Field Service to provide accurate estimates, you must account for all of your time while working. If your user type supports it, you can add activities to your *route* for the internal or non-customer facing work that you do. You might add an *activity* for a company meeting, a lunch break, vehicle maintenance, or a stop for gas.

**Note:** If you don't have permissions to add an internal activity, you can contact dispatch or your supervisor to add an internal activity on your behalf.

1. On the home page, click **Add Activity**.
2. Type the information about the activity in the fields, and then click **Submit**.

When the activity is added, **Position in route** defines the new activity to be ordered or not. Ordered means that the activity is displayed on your route in a given order.

If you are not allowed to select the value for **Position in route**, if you specify a time slot, the activity is displayed in that time slot. Otherwise, it is added as pending at the end of the route.

## Add Time to an Activity

After you start an *activity*, if you determine that you cannot complete it within the estimated duration, you can add additional time. This action automatically recalculates the estimated start times for the activities later in the route.

**Tip:** After you start your activity, perform a site survey to determine if more time might be needed. If it is need, click **Adjust** to add the time.

1. Click **Adjust** for the started activity on your home page.
2. Select the number of additional minutes you require from the **Time till leaving the activity site** drop-down list.
3. click **Submit**.

## How do I suspend an activity?

You can suspend an activity and return to it at a later time in the route.

You can suspend both started and pending activities. The started activity is always ordered; the pending activity must be ordered.

When you suspend a started activity, the activity has these characteristics:

- You can work on it later during the day.
- A duplicate of the original activity is created in a suspended status.
- The duplicate is created for tracking purposes.

When you suspend a pending activity, it is converted to a not-ordered pending activity.

1. Open the **Activity details** page for the activity.
2. Click **Actions > Suspend**.  
The **Suspend activity** dialog box displays and shows the fields configured for your organization.
3. Select the time required to complete the remaining part of the activity in the **Duration** field.  
The duration of the pending activity is the duration you've added here and not the one calculated automatically.
4. Select the reason for suspending the activity from the **Suspend Reason** drop-down list, and enter any notes you think might be helpful.
5. Click **Submit**.  
If you suspend an activity multiple times, the final duration of the activity is considered to be the duration provided for the most recent suspension.

## Duration for Suspended, Reopened, and Pre-Work Activities

You can set the duration for suspended, reopened, and pre-work activities manually. This helps while estimating the remaining duration—it shows the additional work that is needed to complete the activity.

Your Administrator must add the **Duration** field for the **Suspend activity**, **Reopen activity**, and **Start prework**, context layout structures with a Read-Write or Mandatory visibility. When you opens these pages, the application populates the **Duration** field with the activity's initial value. You can modify this value manually, however, be aware of these consequences:

- The new pending activity is populated with the value submitted on the **Suspend activity** page.
- Prework is populated with the value submitted on the **Start prework** page.
- The reopened activity is populated with the value submitted on the **Reopen activity** page.

## Mark an Activity as Not Done

When you select **Not Done**, the activity appears as completed on your route. This status closes the activity so that you can move on to the next activity.

1. Open the **Activity details** page for the required activity.
2. Click **Actions > Not Done**.
3. Select the time of cancelation in the Cancellation Time drop-down list.  
The current time is displayed by default. You can leave it as it is, or change it.
4. Select the reason for which the work could not be done, and enter any notes you think might be helpful.
5. Click **Submit**.  
The activity moves to the closed list and is color-coded with the not-done status color.

## How do I reschedule an activity?

If your user type allows it, you can reschedule an activity for another day. Activities that have crossed the Overnight work time are 'frozen'. You cannot reschedule such activities.

1. From the **Activity details** page, click the activity that you want to reschedule.

**2. Click Actions > Reschedule.**

The **Reschedule Activity** page displays.

**3. Click the date to which you want to move the activity.**

- Blue dates are in the future and can be selected
- Black dates are in the past and cannot be selected

Oracle Field Service checks your schedule for the day and then displays the times in your schedule that are available for moving this activity. Rescheduling options include these:

- Not ordered
- Set first
- After (an activity)
- Set last

If no schedule information is available, Oracle Field Service displays **Not Ordered** and **Ordered**.

**4. Select a rescheduling option for this activity.**

**5. Review the alerts in the confirmation dialog box, and then click Submit.**

## End an Activity

After you have completed the work, you must close the *activity* in the application. Depending on your business, ending the activity may include assigning codes, notes, and reasons, as well as obtaining a customer signature.

**1. Click Activity Completion** for the current activity on your home page.

The **End activity** page displays.

**2. Select the time of completion from the Completion Time drop-down list.**

By default, the list displays your current time. You can change it, or leave it as it is.

**3. Select the appropriate finding-code options from the drop-down lists, and then click Submit.**

The activity is marked with a **Completed** status, and appears in blue on the list view in the **Closed** section. Be aware that you cannot update the inventory details for a completed activity. In addition, be aware that if you are using a touch screen device, the app detects touch as the method to fill the signature. In such cases, you cannot use the mouse to fill the signature.

## How do I update an activity location by repositioning the pin?

Sometimes, the activity location can't be resolved, is resolved with a low accuracy, or the site may have multiple entrances. In such cases, you can update the activity location by repositioning the pin on the map manually.

The Reposition button is available when:

- The address is resolved with a high accuracy.
- The address is resolved, but the accuracy is low.

- The address isn't resolved and an approximate location is available.

**Tip:** If you've requested Google to change any information on the map, Oracle Field Service may take some time to display it. You can keep refreshing the page to see the change. If not, you can make some insignificant change to the address so that Oracle Field Service sends a new request to update the address.

1. Open the activity for which you want to update the location.
2. On the **Activity Details** page, click **Update Activity Location**.
3. Click **Reposition Pin** and place the pin at the desired location on the map.
4. Click **Update**.

If you modify only the address fields and click **Resolve**, then the address fields and coordinates are updated. If you reposition the pin without modifying the address, then only the coordinates are updated.

When you update a location on the map, then the coordinate accuracy is considered as high. For more information about the best practices to resolve the coordinates, see the knowledge article **What are the best practices to resolve geocoordinates in Oracle Fusion Cloud Field Service? (Doc ID 2947220.1)** on My Oracle Support.

## 'En Route' Activity Status

You can set an ordered, a not-ordered, or a non-scheduled activity in the route as 'En route'. However, to set the 'En route' status for an activity that is not the first activity in the route, you must have the permissions similar to the 'Start' activity. You must have the 'Allow activity reorder inside the route' and the 'Allow activity move from non-scheduled pool to scheduled one' permissions.

When you enable the **En route Support** feature, you cannot use the activity bundling feature. You can perform the activities that don't require travel (non-travel activities) according to the order in the route. However, after you set 'En route' for an activity, you cannot perform a non-travel activity.

You can change the activity status to 'En route' in these scenarios:

- At the beginning of the day
- After a break
- After completing the previous activity

After you set the 'En route' status, you can perform these tasks:

- Change the activity and work on a different activity
- Stop the travel and move the activity to another day or resource
- Cancel the 'En route' activity
- Move the 'En route' activity

When you set 'En route' for an activity, the application adjusts the travel time according to your location (with real-time traffic) despite existing Service Window, Access hours, or SLA and updates the ETA. If you have configured a Message Scenario to notify your end customers, they are notified. The Where is My Technician page shows the actual On the Way status with an updated ETA. Routing excludes the activities with En route status from optimization.

**Note:** Real-time traffic is available only if you have a valid license for Oracle Field Service Enterprise Edition with Google Maps.



If your organization has enabled the 'En route Support' feature and you do not set an activity as 'En route', then:

- Oracle Field Service doesn't consider you as on the way to an activity until you set the "En route" status.
- Travel time is not recalculated.
- If you have configured a Message Scenario to notify your customers, they are not notified.
- Where is My Technician page doesn't show the "On the way" status and your position and track.

## Change the Status to En Route at the Beginning of the Day or After a Break

You can set the 'En route' status through the My Route or Activity details page, or through the Activity hint. This is possible only if your administrator has configured the 'En route' button for your user type.

1. Log in to Oracle Field Service.
2. Activate your route.
3. Go to the My Route or the Activity details page. Or, click the hint for the activity for which you want to change the status.
4. Click **En route**.

The ETA is updated with the Real-Time Traffic, regardless of the existing Service Window, Access hours, or SLA and the travel starts immediately. It is NOT a best practice to use the en route status when you are not going to a customer site. The landing page shows the activity in the En route tile.

If there is an alert for the activity, the color of the alert takes precedence over en route in the Dispatch Console. For example, if you set an activity as 'En route' and the activity is likely to lose the SLA, Dispatch Console shows the color configured for the SLA alert.

Sometimes you may agree with a customer to meet earlier than the Service window, Access hours, or SLA specified in the appointment. If the time of arrival calculated on the 'En route' page is at least 15 min earlier than the beginning of the time window, then you customer is notified with an appropriate message. For example, 'For this activity SLA window starts at 18:00'.

When an activity doesn't have the resolved coordinates, the device location is not available, or the device is offline, then a corresponding message is displayed on the map of the 'En route' page. The message could be 'Activity location cannot be found', 'Cannot identify your location', or 'Map is not available when offline'.

**CAUTION:** Don't use the 'En route' status if you want to arrive earlier and wait near the customer site. The status change updates the ETA and sends a notification.

## Change to En Route After Completing an Activity

When you mark an activity as End, Not Done, or Cancel you can select the next activity that you're going to. After the confirmation, the next activity becomes 'En route'.

1. Sign in to Oracle Field Service.
2. Open the Activity details page for the activity that you want to complete.
3. Click **Complete**.
4. Fill up the required fields and click **Submit**.

5. On the **Select next activity** dialog box, select the next activity that you want to go to.  
The Travel Time option is available on the **Select next activity** dialog box only if **Display and allow adjustment of remaining Travel Time** is selected on the **Configuration > User Types > General** page for your user type.
6. Click **Confirm**.  
The selected activity is assigned with the En route status. This behavior doesn't depend on the 'En route' action link configured for your user type.

## Take a Break After Completing an Activity

When you mark an activity as End, Not Done, or Cancel you may take a break, before proceeding to the next activity. You can indicate this in the application.

1. Log in to Oracle Field Service.
2. Open the Activity details page for the activity that you want to complete.
3. Click **Activity Completion**.
4. Fill up the required fields and click **Submit**.
5. On the **Select next activity** dialog box, select **I will be idle for a while**.  
If you do not have the 'Allow selection of the next activity on Complete' permission, you can't change the order of appointments. So, you will not see the **Select next activity** dialog box.
6. Click **Confirm**.  
The remaining activities in the route are in Pending status. Your travel time is not considered for learning until you mark the next activity as En route.

## Change the Activity After Selecting 'En Route' Status

Sometimes, an urgent activity may come up when you have already set 'En route' to an activity. You can change the activity, select the urgent activity and click 'En route'. You must have the 'Allow activity reorder inside the route' and 'Allow activity move from non-scheduled pool to scheduled one' permissions to change an En route activity to a different activity.

You must perform this procedure when you receive an urgent activity after marking an activity as 'En route'.

1. Open the **Activity details** page for the urgent activity that you want to attend to.
2. Click **En route**.  
The previous activity is returned to the Pending status and is ordered first in the route. The urgent activity is changed to En route. If there is an alert for the activity, the color of the alert takes precedence over en route in the Dispatch Console. For example, if you set an activity as 'En route' and the activity is likely to lose the SLA, Dispatch Console shows the color configured for the SLA alert.

## Stop Travel and Move an Activity to Another Day or Resource

Let's say you are on the way to an activity and your vehicle breaks down. You can stop your travel and reschedule the activity to another resource or another day. You can proceed to the next activity after your vehicle is repaired.

1. Open the **Activity details** page for the activity that you want to stop.
2. Click **Stop Travel**.  
A confirmation dialog box appears and informs you that the status of the current activity will be changed to Pending.
3. Click **Submit** on the confirmation dialog box.  
The current activity is marked as Pending.

4. Open the **Activity details** page and move the activity to another resource or day.
5. When you are ready to go to the next activity, open **My Route**.
6. Click **En route** for the next activity in the route.

## Restoring Partially Filled Pages from Drafts

You can save the data on the partially-filled Forms or Tabs and restore the data at a later stage. Drafts are supported for serialized inventory and not supported for non-serialized inventory.

You have this option available on the Activity, Resource, Inventory, and User pages.

When you edit or fill a form partially and try to navigate to another page, a confirmation dialog box appears on the page. Depending on your selection (either Yes or No), you can either save the draft or discard the changes.

Click **No** you'll be redirected to the previous page and you'll lose all the unsaved data.

Click **Yes**; you save a draft of the changes and navigate to the previous page.

If you save the draft and navigate back to the same page, **Restore Draft** appears on the page. This indicates that a partially filled form exists and you can restore it. Click **Restore Draft** to restore and use an existing draft. After you submit the draft, you won't find the same draft again.

**Note:** If your device does not have enough browser storage or space, the application does not provide this option.

Drafts are retained when you suspend an activity and for the Pending activity that is created upon the Suspend action when you use the same browser or device.

### Draft Retention Impossible States

A draft is available only in your browser or device where it is saved. If you log in using another browser or device, the draft won't be available. In addition, your drafts won't be retained in these cases:

- If the activity status is changed to Completed, Cancelled, or Not Done.
- The following day, defined by the **Overnight Work** setting on the **Business Rules** page for the following pages and statuses:

- Resource, Inventory, and User pages
- Pending and Started activities

## Save Image Metadata from Camera Images

The application automatically saves the timestamp and GPS coordinates in the metadata of the images taken from the camera in the Core Application. Both coordinates are stored in the metadata of the images in the EXIF format.

- Timestamp Metadata

The timestamp is always saved in ISO format with the UTC zone offset for all the images taken from a camera. You can obtain the timestamp from these metadata tags:

- DateTimeOriginal: Date and time when the original image was taken.
- DateTimeDigitized: Date and time when the image was stored in .
- OffsetTimeOrigin: Time zone of the original date and time.
- OffsetTimeDigitized: Time zone of the digitized date and time.

- GPS Coordinates Metadata

Enable these functions on your mobile devices to save the GPS coordinates in metadata:

- Enable the Geolocation setting in General settings.
- Enable the Location setting in Camera settings.

You can obtain the location from these metadata tags:

- GPSLatitudeRef: Indicates whether the latitude is North or South. The ASCII value 'N' indicates north latitude, and 'S' is south latitude.
- GPSLatitude: Indicates the latitude. The latitude is expressed as three rational values as dd/1, mm/1, ss/1. When degrees and minutes are used, for example, fractions of minutes are expressed up to two decimal places, then the format is dd/1, mmmm/100, 0/1.
- GPSLongitudeRef: Indicates whether the longitude is east or west. ASCII 'E' indicates east longitude and 'W' is west longitude.
- GPSLongitude: Indicates the longitude. The longitude is expressed as three rational values as ddd/1, mm/1, ss/1. When degrees and minutes are used, for example, fractions of minutes are expressed up to two decimal places, the format is ddd/1, mmmm/100, 0/1.

1. Log in to Core Application.
2. Take a photo in Core Application.
3. Save the image.
4. Verify the image's properties.

### What to do next

**Note:** Location and time stamp are an integral part of images. You should download images to your external applications through a Core API or Daily Extract and retrieve the information from the metadata. Currently, doesn't show this information either in UI nor provides it separately through public APIs.

## View, Download, and Clear Images

You can download the images taken by technicians or view the images in their full-size dimensions. Field workers can view the photos and download them on their mobile devices, if needed. The Download and Clear options are available automatically when you add an image element to a Visual Form Editor. The Download and Clear options are also available for the File attachment and Signature elements.

1. Log in to Core Application or the installed application.
2. Open the **Activity details**, **Inventory details**, or the **Form history** page.
3. To view the image in full-size, click it.

The image is displayed in its real size, overlapping the page. Here, real size means:

- For custom properties: The dimensions specified in the property configuration.
- For form elements: The default dimensions.
- Compression applied by the application.

4. To download the image, click the download icon below the image.

The image is downloaded to your device.

5. To remove the image from the activity or the Form, click the clear icon.

The image is deleted from the application. The clear icon is available for the fields that have Read-Write or Mandatory visibility.

## Manage Activities from a Map

You can manage a large number of activities from the map quickly and efficiently.

You can view and assign non-scheduled activities depending on the geographical information, resource's work skills, and urgency of the activity. You can use the map to:

- View assigned activities on the map and in the form of a list
- View the resource's start and end location
- Identify intervals of available time in the route list
- View nearby non-scheduled activities and their priorities (**Urgent**, **Normal** and **Other**)
- Review additional details of the route and nearby activities
- Estimate a summary duration of the selected group of nearby activities
- Assign and schedule multiple nearby activities to the route in a single step
- Estimate distance using the map scale
- Review and order the new route, including seeing any constraint violations

The number of locations displayed on the Map varies depending on the device screen size; this could range from a few dozen to hundreds.

The location of the non-scheduled activities is displayed based on the priority using these grades:

Type	Definition	Order by	Marker Size/Color
Urgent Activities	Activities that have one of the values of priority property specified in the business rules on "Urgent" Activity Priority Configuration.	<ul style="list-style-type: none"> <li>specified in the business rules on "Urgent" Activity Priority configuration.</li> <li>aid — activity creation time</li> </ul>	Big/Red
Normal activities under risk	Activities that have one of the values of priority property specified in the business rules on "Normal" Activity Priority Configuration.	<ul style="list-style-type: none"> <li>order specified in the business rules on urgent "Normal" Priority configuration.</li> <li>SLA end — the SLA ends before the end of the given day</li> <li>activity creation time (aid)</li> </ul>	Big/Pink
Normal activities	Activities that have one of the values of priority property specified in the business rules on "Normal" Activity Priority Configuration.	<ul style="list-style-type: none"> <li>order specified in the business rules on urgent "Normal" Priority configuration</li> <li>SLA end</li> <li>activity creation time (aid)</li> </ul>	Big /Yellow
Other activities under risk	Any other activities that have SLA ends before the end of the given day	<ul style="list-style-type: none"> <li>SLA end — the SLA ends before the end of the given day</li> <li>activity creation time (aid)</li> </ul>	Small / Pink
Other activities	Any other activities	<ul style="list-style-type: none"> <li>activities with SLA end ordered by SLA end, then activities with undefined SLA end</li> <li>activity creation time (aid)</li> </ul>	Small / Yellow

## Select Activities to Manage

You can click on any activity marker to view the details of the activity.

When selecting a multi-marker, the activity details of the group appears on the page.

1. Log in to the Oracle Field Service Core Application.  
A list of your activities for the day is displayed.
2. Click **Map**.  
The map and activity list appear on the page.
3. Select the **Scheduling layer** from the layers icon to display non-scheduled activities.

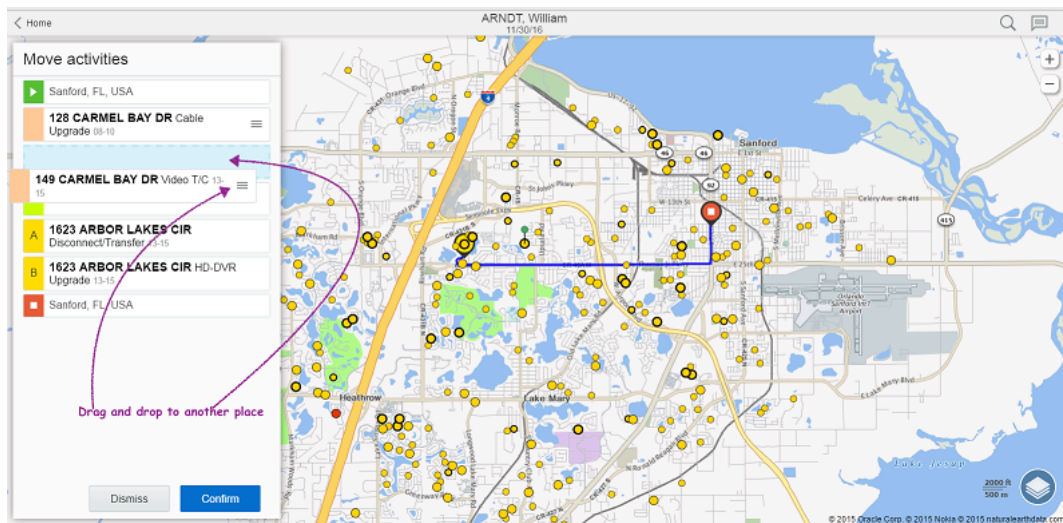
4. Click an activity marker.  
The activity details appear on the page.

## Assign or Schedule Activities

You can assign activities from the map by clicking each activity and dragging and dropping it.

The selected activity's information is displayed at the bottom of the page or on the left side based on the screen size. When you click **Assign**, the selected activities are added to the route. If an activity cannot be added for reasons such as losing service window or beyond access hours and schedule, an alert is displayed.

1. Open the **Map**.
2. Click an activity on the selected route and view its details.
3. Drag and drop the activity to the desired position in the route.  
The activity is added to the route and you can reorder it within the activity list.
4. Click **Dismiss** to remove an activity from the route or **Confirm** to add the activity to the route.



## Move Activities

You can move the location of activities from one point to another on the map.

1. Select the activity that you want to move.  
The details of the activity is displayed at the bottom.
2. Click **Move**.
3. Click **Move** to move the activity to desired location on the map or **Dismiss** to keep the activity in the existing location.  
If the activity cannot be moved for violation of rules, an appropriate alert is displayed.

## Group Operations on Selected Activities

You can perform group operations on selected activities from the map page. You can select, review, and assign up to 99 activities at once using the multi-marker.

1. Log in to the Oracle Field Service.

2. Click **Map**.

The Map and Activities list appears on the page.

3. Select the **Scheduling layer** from the layers icon and display the non-scheduled activities.

4. Click an activity marker.

The details of the activities appear on the page.

5. Click **Assign** to add the activities to the route for ordering or click **Dismiss** to go back to the map.

6. Repeat steps 4 and 5 to add activities to your route.

7. Drag and drop each activity to the desired position on the map.

8. Click **Confirm** to add activities to the route or click **Dismiss** to remove the activities from the route.

**Results:**

Required operation is performed on the selected group activities.

## Adjust Travel Time

You can adjust the time required to travel to the next activity location.

The travel time countdown indicator appears on your page after you change the activity status to End, Not Done, or Cancel, and displays the travel time to the next activity.

If you are offline and if you select an activity that is not the next activity in the actual route, the travel time to the next location will have a blank value as default. You can choose any value from the drop-down list.

The travel time countdown indicator appears on your page depending on the mobile device you are using. If your mobile screen width is 540 pixels or more, the indicator is displayed on the right side of the title bar.



For the devices with a small screen width, the indicator appears as a bar across the top.

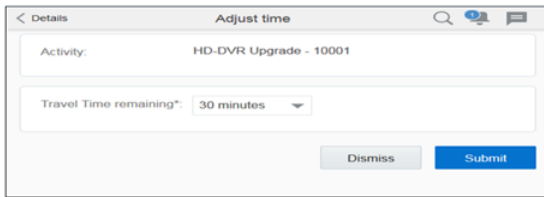


As the time remaining decreases, the color of the indicator changes from green to red.



You can adjust the travel time to indicate if you need additional time to travel to the activity site by clicking **Adjust**. Adjusting the time updates the information that is displayed in the indicator.





Since the indicator displays on many pages, it still will be visible should you need to navigate away from the **Activity details** page. You cannot adjust travel time for next activity for Multiday segments.

## How do I adjust travel time for the next activity?

You can adjust the time required to travel to the next activity when you are about to complete the current activity.

**Note:** The **Display and allow adjustment of remaining Travel Time remaining** option must be selected on the **Configuration > User Types** page for the corresponding User Type to use this functionality. The behavior is also influenced by the **Allow selection of next activity on Complete** option on the **Configuration > User Types** page for the corresponding User Type.

When you are about to mark an activity as **End**, **Not Done**, or **Cancel**, you can adjust the travel time for the next activity. You will find different options based on how Allow selection of next activity selection on Complete is configured.

1. Start an activity by selecting **Start**.
2. Change the status of the activity to one of the three options (End/Not Done/Cancel). Either one or both options appear on the page:
  - o Ability to select the Next Activity from a drop-down list. This displays a drop-down list where you can select the next activity to be visited.
  - o The Travel Time Remaining selection field.
3. Select the required time from the **Travel Time** drop-down list.
4. Click **Submit**. The travel time for the next activity is updated.

**Note:** If there is no idle time before the next activity, or if the idle time is less than the amount of time travel that is being adjusted with, the start time of the next activity may be shifted to a further time. If the previous activity finishes late, you must adjust the travel correspondingly to shift the planned start time of the next activity.

## Scan NFC Tags

You can scan Near Field Communication (NFC) tags to populate data in custom forms, or to write data to the tags using your installed app. In addition to using NFC scanning, you can type or edit the values in the fields configured for NFC scanning.

Conditions to use this option:

- Your administrator has configured the fields for NFC scanning.
  - You are using the Update 22C Android or iOS installed app.
  - Your device supports NFS scanning and it is enabled in Settings.
  - The NFC tag contains a single field containing plain text.
  - The format of the tag is NDEF.
1. Navigate to the page or form containing custom properties, product fields, or form fields that are configured for NFC scanning. These elements are indicated with a special icon.
  2. Tap the NFC icon and hold your phone next to the tag.  
The app populates the data from the tag into the field. The app also displays typical warning or errors such as these:
    - Hold your phone near the tag.
    - Enable NFC scanning in your mobile device.

## Take Photos Using the In-App Camera

You can take photos using the in-app camera available in the installed app, without navigating away from the app. If you access Oracle Field Service through a browser, you will use the native device camera.

1. Follow these steps to take a photo:
  - a. Click a field that has an image property. The capture image page opens.
  - b. Tap an area to focus.
  - c. Click the capture image button.
  - d. Switch between the front and back cameras through the swap camera button on the capture image page.
  - e. Click Cancel to go back.
2. Follow these steps to zoom in or zoom out:
  - a. Pinch the image in or out to zoom in or zoom out. When you activate zoom, you can also use the slider to zoom in or out. The slider disappears, if the zoom function is idle for a while.
3. To set the flash, tap the flash button in the top right of the capture image page. You can turn the flash On or Off, or set it to auto.
4. Follow these steps to preview a photo:
  - a. After you capture an image on the capture image page, you get the preview page where you have options to:
    - View the captured images.
    - Edit the captured image.
    - Save the image (Submit button).
  - b. You can click the back icon in the top left and go back to the capture image page. If you go back without saving, you see a warning that you will lose the captured images and any edits.
5. Follow these steps to crop an image:
  - a. Click the crop icon on the top left of the preview page to activate the crop mode.
  - b. Move the crop grid to the required area and crop the image. When you finish cropping, click the check mark at the bottom right to confirm the edits.

- c. Click the back button to exit the crop mode.
  - d. If you have cropped an image incorrectly, you can reset the crop by clicking the reset button at the lower left corner of the crop page.
6. Follow these steps to draw an image:
  - a. Click the draw icon on the top left of the preview page to activate the draw mode.
  - b. Draw on the image and highlight the required areas. When you finish highlighting, click the check mark and confirm the edits.
  - c. Click the back button to exit the draw mode.
  - d. To reset a drawing, click the reset button at the bottom left.

A watermark is added to the image, if your administrator has configured it. The watermark includes the current date and time, UTC offset, and the latitude and longitude. The date and time are recorded in the your time zone and displayed in the format configured for you. Further, you must select the location service on your mobile device for the watermark to be added. If you open the application on a browser, you must select the permission to track the geolocation on for the environment.

## Overview of Booking an Activity

When you perform an activity at the customer's premises, the customer may enquire about the possibility to perform another job for them on a different day. You must be able to collect the information about the new job, create an activity, and schedule it right away. To book an activity, you must also have the ability to check the available capacity for that specific date and time. This situation is handled by the Book new activity option. The **Book new activity** option is configured in the **Application screens** section of the **Screen Configuration** page.

**Note:** The activity booking functionality, Quota management page, and the Capacity Area configuration functionality are available only with the "Oracle Field Service Enterprise Cloud Service" subscription.

You can book activities in three ways:

- Direct assignment booking
- Quota-based booking:
  - Time slot based
  - Booking interval based (or availability based)

### Direct Assignment Booking

Activity booking uses the activity information and finds all the Capacity Areas that match the activity requirements. If a Capacity Area is configured for booking using direct assignment, the activity is created (or reassigned) in your route, provided you meet the activity requirements and has enough time to complete it. When there are many available resources that can work on the activity for a particular date and time slot, Oracle Field Service assigns the activity to one of them. The application typically finds a technician that has a smaller set of working skills than a technician with a wider skillset. This way, resource selection is optimized, so that the following activities that require booking have more available options. With this feature, you can control the booking strategy that is used on a Capacity Area level. You can also configure different capacity areas to use different booking strategies.

### Availability-Based Booking

You can book activities for Capacity Areas with booking interval based quota configuration. You can use the booking interval based quota when the time slots overlap or, have a significant variation in the activity duration. When you

choose the booking interval based quota, you must select the booking intervals on the Quota Configuration page. If you do not select the booking intervals, the application uses the default Capacity intervals that are configured on the **Business Rules** page.

When you configure a Capacity Area for booking using Quota (time slot based or availability based), then the activity is created (or reassigned) on the bucket that is associated with the Capacity Area. If there are multiple Capacity Areas, you must select a Capacity Area, select the day and time slot on which they want to perform the activity, and book it.

When you try to book an activity, the application uses the activity information you have entered and provides you the list of options where it may be booked.

As soon as you book an activity, Oracle Field Service subtracts the capacity required for its performance from the available capacity and adds it to the used capacity. It compares the used capacity to the quota values to make sure that orders for new activities are accepted only when the capacity is still available. As having capacity information up-to-date is crucial for the functionality, Activity Booking is available only in the online mode.

## Booking Recommendations

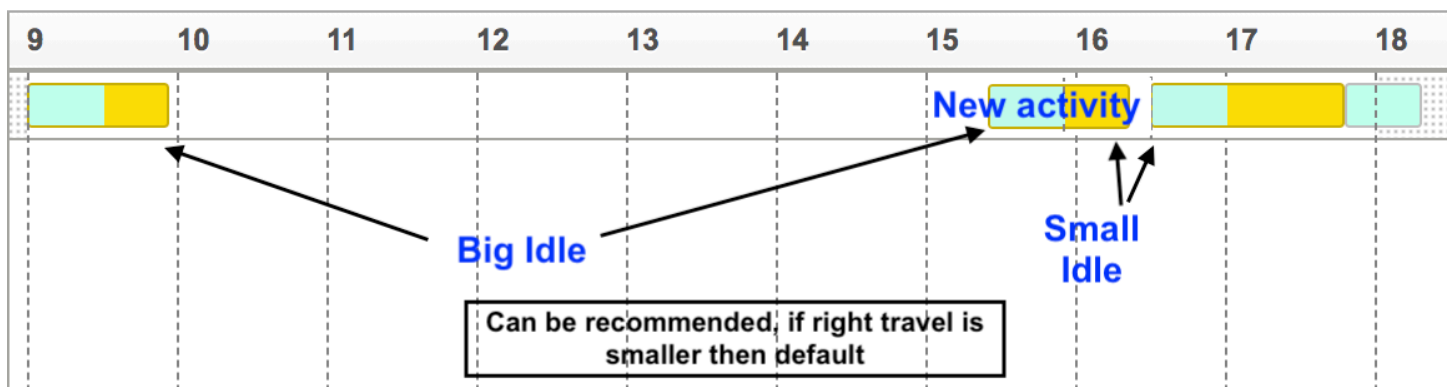
You can choose to include recommendations for booking activities for each Capacity Area independently. The application typically recommends time slots that reduce overall travel expenses.

The application tries to optimize travel time, so if there are some booking options that allow better activity distribution, it marks those options as preferable or recommended. The application recommends a booking option if the travel time that appears after the booking is less than the default travel time for the activity type. The application provides recommendations in the same way for both, direct assignment booking and for booking by Quota. However, for the direct assignment option, the application uses the travel time estimation (minutes). Whereas, for booking by Quota the application suggests the options by optimizing the distance to other existing activities in the bucket that are close by time and place.

The application considers these travels:

- Travel to the booked activity, if there is a preceding activity close enough with small or no idle time.
- Travel after the booked activity, when there is a following activity with small or no idle time.
- Average of travels "to" and "after," if a new activity is booked between two others with small or no idle time.

Example of a technician route when the application recommends the booking option. In the example, the option may be preferred, if the travel time after the booked activity is smaller than the default travel time:

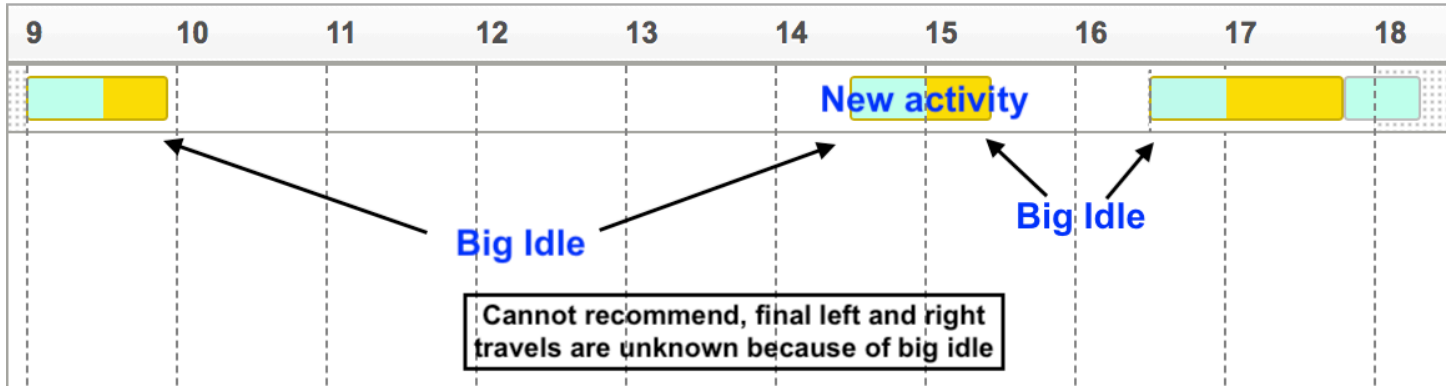


Oracle Field Service does not mark the available options as recommended or preferred, if:

- The application cannot estimate any of the travels (before or after).

- The idle time before and after the activity is big, which means that later on another activity might be added and the travel might change.
- The estimated travel is bigger or equal to the default travel time.

Example of a technician’s route with a long idle time before and after the activity. This option may be used for booking, but the application cannot recommend it over the other booking options:



Example of the Book Activity page with some recommendations:

Time Slot

Booking | Planning ▾

October 2020 November 2020

	25 Sun	26 Mon	27 Tue	28 Wed	29 Thu	30 Fri	31 Sat	01 Sun	02 Mon	03 Tue	04 Wed	05 Thu	06 Fri	07 Sat	
08-10 (08:00 AM-10:00 AM)			👑												08-10 (08:00 AM-10:00 AM)
10-12 (10:00 AM-12:00 PM)			👑												10-12 (10:00 AM-12:00 PM)
13-15 (01:00 PM-03:00 PM)			🚫												13-15 (01:00 PM-03:00 PM)
15-17 (03:00 PM-05:00 PM)															15-17 (03:00 PM-05:00 PM)

Show legend

**i** Please select a time to book a scheduled activity

The options marked with a special sign give a bigger probability of decreased overall travel expenses.

Assuming 100% as the number of all booking options shown on the page, then:

- Gold: Approximately 5% of all the booking options, which are the best from the possible travel reduction.
- Silver: Approximately 5 to 20 % of the options.

Let’s say, a booking screen shows 80 cells for booking an activity, where there are many options for the activity to be booked close to an existing activity. Oracle Field Service recommends those options that optimize traveling expenses.

Not more than 20% of all the options are shown as recommended ( $84 / 100 * 20 = 16$ ), giving 16 marks, 4 of which would be the gold recommendations ( $84 / 100 * 20 = 4.2$ ) and the remaining 12 would be silver recommendations.

However, the actual number of recommendations may vary and depend on the number activities with close coordinates. If there are equally good options, then the recommendations can become more than 5 or 20 percent of the options, because Oracle Field Service cannot choose which option to recommend. So, in the example, there could be more than 4 gold and more than 12 silver recommendations, if identical options are available.

## Create a Booked Activity

The activity booking process includes three steps: creating the activity, scheduling the activity, and updating capacity. This section describes these steps.

You can access the **Book Activity** function in two ways:

- From the button on the **Activity List** page
- From the **Activity Details** page of an existing activity

Your administrator must add the **Book Activity** button to the context layout structures of the corresponding pages, before you use the function.

## Create a Booked Activity From the Activity List

Use the **Book Activity** button located on the menu bar. As the feature is available only in the online mode, the button is disabled when the mobile device is offline.

### 1. Tap **Book Activity**.

The **Book Activity** page opens with a blank activity booking form.

### 2. Add the activity and the customer details.

### 3. Click **Dismiss** to abort the operation, or click **Next** to continue with creating the activity.

## Create a Booked Activity with Predefined Activity Information

Use the **Book Activity** button located in the **Activity Details** page. As the feature is available only in the online mode, the button is disabled when the mobile device is offline.

### 1. Tap **Book Activity**.

The **Book Activity** page opens with the details filled in.

### 2. Edit the details as required.

### 3. Click **Dismiss** to abort the operation, or click **Next** to continue with creating the activity.

### 4. Click **Activity** to view the activity details.

## Schedule a Booked Activity

The **Time Slot** page is displayed when you click **Next** on the **Book Activity** page. Use this page to schedule a booked activity. The fields displayed on this page depend on the way you have set up the layout. If the data entered in the Create a Booked Activity step is insufficient, the capacity is not calculated, and an error message is shown.

### 1. From the **Schedule to** drop-down list, select the capacity to which you want to schedule the activity.

The available time slots change based on the selected capacity. The available time slots are displayed in Green and the current date is highlighted.

### 2. Use the navigation arrows to review the time slot availability in future dates.

Time slots are displayed for a maximum of 45 days from the current date.

3. Tap the time slot in which you want to schedule the activity.

You can select only one time slot for an activity.

4. Tap **Details** to view the activity details.

5. Tap **Submit**.

The message, Activity has been booked appears.

#### Related Topics

- [Error Messages](#)

## Reschedule a Booked Activity

You can use the Activity Booking page to not only book a new activity, but also to reschedule an existing activity. You can configure the page layout to show the activity information with the booking options. You can also configure the activity properties that must be modified while rescheduling, for example, the "Reason for Reschedule" property.

## Error Messages

This section provides the list of possible errors and the corresponding messages the user may encounter while booking activities.

### Missing context error

If at least one of the two contexts ('Book new activity', 'Schedule booked activity') is not added before using the Activity Booking functionality, the message: Form is misconfigured. Context layout missing appears. Depending on which context is missing, the error is shown so, you can access the corresponding pages.

### Validation errors

If any of the mandatory fields is empty on the booking activity contexts ('Book new activity', 'Schedule booked activity'), the validation message, Validation failed, please review your form is shown. If a time slot has not been selected on the **Time Slot** page, the activity is not booked and the message, Validation failed, please review your form. Time slot is not selected is displayed.

### Capacity calculation errors

Capacity is not calculated in these cases:

- Data entered in the previous step (creating booked activity) is insufficient.
- A configuration has not been properly performed.
- There is no available capacity that matches with the activity parameters.

The possible error messages that may occur at the capacity calculation stage, that is after submitting information entered in the booking activity form are as follows:

- Work skills support is disabled at the company level.
- Work skills are not supported by this type of activity.
- Capacity category cannot be determined using the given activity fields.
- The selected activity type is inactive.
- Work zone cannot be determined by the given activity fields.
- Field or property that is required for work zone 'location' value calculation is missing.

- Time slots are not supported by this type of activity.
- Field or property that is required for the duration estimation is missing.
- Field or property required for travel estimation is missing.
- The matching buckets found don't have the required quota for booking this activity.
- Unable to find appropriate quota bucket for this activity.

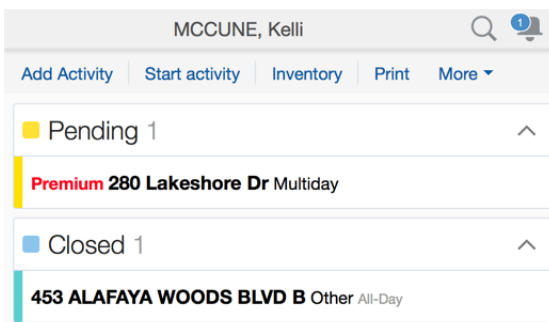
## Working with Segmentable Activities

### About Segmentable Activities

A *segmentable activity* requires several days to complete. The *activity* is split into segments that can be managed individually while remaining parts of a single entity.

Due to the specifics of segmentable activities, you must create them in Oracle Field Service Core Application and **not** in Oracle Field Service Mobile for Android and iOS. However, as soon as you create and schedule the activity in Oracle Field Service Core Application, you can view and manage its segments in Oracle Field Service Mobile for Android and iOS.

Segmentable activity segments appear in the activity list on your home page, and are included in sections according to their statuses.



### Start a Segmentable Activity

Starting a *segmentable activity* segment is the same as starting a single-day *activity*.

If a segment is the first pending activity in an activated *route*, click **Start** to access the **Start activity** page.

When you start a segmentable activity, its status is **started**, regardless of the status of the current segment. The **Progress** field shows the progress of the segmentable activity performance, both in percentage and the number of segments.



< Home Activity details 0:57 Adjust

End Adjust Time Not Done Map Inventory

Time to complete: 25 hours

**Multi-day activity info**

Status: started

Total duration: 25 hours

Progress: 0%, 0 of 5 segments are finished

## Cancel a Segmentable Activity

You can cancel any pending *segmentable activity* or pending segment of a segmentable activity.

In addition to the fields usually present on the **Cancel activity** page for single-day activities, this page has a special **segmentable activity is finished** check box that allows you to cancel the entire segmentable activity together with the current segment. Checking the check box, confirms that you are completing the entire activity, together with the segment.

If you choose to cancel only the current segment (by leaving the check box unchecked), the **Cancel activity** page has the **Time to complete** field showing the remaining duration of the segmentable activity. Initially, the **Time to complete** value is the total duration of the segmentable activity minus the duration of the finished segments. The **Time to complete** can be adjusted simultaneously with canceling a segment. If you cancel the segment before the completion of the time to complete, the remaining duration is moved either to the non-scheduled pool or to a new segment on the next day, depending on where the activity was created and the activity is marked as canceled.

If you choose to cancel the entire segmentable activity and check the check box, the **Time to complete** field is hidden.

## Complete a Segmentable Activity

You can complete a started segment of a *segmentable activity* by clicking **End** and entering the required information.

In addition to the single-day activity fields, a **segmentable activity is finished** check box displays on the on the **End activity** page. When checked, you confirm that you are completing the entire activity together with the segment. When

the current segment is the last segment of a segmentable activity, the check box is enabled by default, otherwise it is disabled.

If the last segment is completed simultaneously with the expiration of **Time to complete**, the segmentable activity is completed. However, if **Time to complete** is longer than the duration of the last segment, the remaining duration is moved to the non-scheduled pool after the completion of the last segment, and the segmentable activity remains **started**.

If you choose to complete only the current segment (by leaving the check box unchecked), the **Time to complete** field on the **End activity** page shows the remaining duration of the segmentable activity. Initially, the **Time to complete** value is calculated according to the following formula:

$$\text{segmentable activity duration} - \text{Duration of finished segments} - (\text{current time} - \text{start time})$$

The **Time to complete** value can be adjusted simultaneously with completing a segment.

**Note:** Changing the **Time to complete** value results in recalculation of the remaining pending segments of the segmentable activity and may cause changes to their number and/or duration.

If you choose to complete the entire segmentable activity and enable **segmentable activity is finished**, the **Time to complete** field is replaced with the **segmentable activity status** field, allowing you to select either **completed** or **not done** from the drop-down list as the final status of the segmentable activity.

The final status of a segment may be different from the final status of the entire segmentable activity. For example, a segment can be closed as **not done** while the activity will have the **completed** status, and vice versa.

If you choose to complete the entire activity together with completing a segment that is not the last in the segmentable sequence, all subsequent segments are deleted from the route(s).

You can set a segmentable activity as not completed in a similar manner, except the final status of the activity will be **not done**.

The **not done** button of a started segment behaves in the similar manner, also offering an option of completing the entire segmentable activity or setting it as not done.

## Use Maps

### Overview of Maps

Oracle Field Service maps help you locate stops on your *route* by providing visual details and driving directions.

#### Related Topics

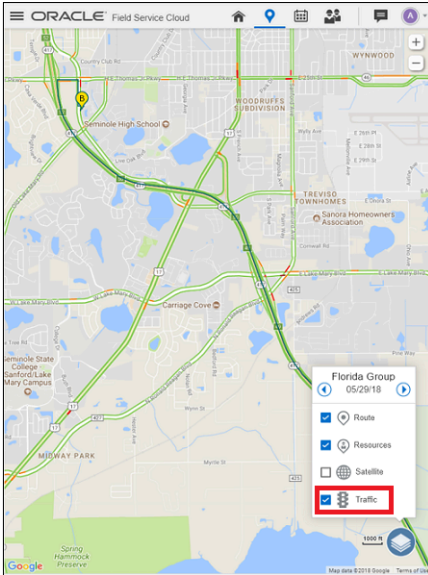
- [Work-Zone Shapes](#)
- [Custom Map Layers](#)
- [View Route Maps When You're Offline](#)
- [View Activity Location on a Map](#)
- [View Directions to the Next Activity on Your Route](#)

## View the Traffic Layer

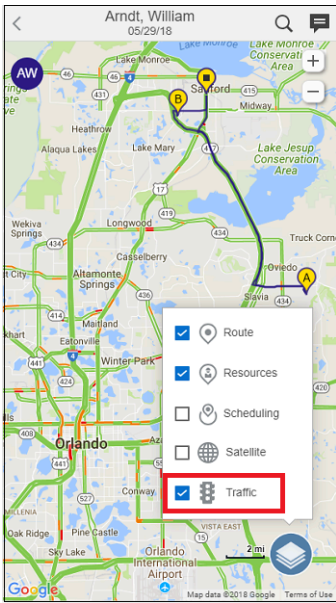
The traffic layer is available to users of Oracle Field Service Enterprise Cloud when Oracle Field Service Standard Map Cloud Service with Google Maps or Baidu Maps is part of your subscription.

The layer is available when using the Team or Route maps.

### Team Map



### Route Map



Traffic information is displayed on the map when the Traffic option is selected on the layer switcher for the current date. Navigating to a past or future date makes the Traffic layer inactive. The Traffic option needs to be reenabled if you navigate away from the Map view to another screen.

**Note:** Traffic information will vary based on the map providers data availability which may not be available in all countries/areas/states/provinces/localities. Please check the map providers website for data availability. When traffic data is available, the system uses the most recent information available from the map provider which may not always be the current information.

## View Activity Location on a Map

Before starting an activity, it is possible to view a map of the customer address.

To view the location of an activity on the map:

1. Select the activity that you want to map from your home screen. The **Activity details** screen displays.
2. Click **Map**.  
The map displays, with a green marker that indicates the location of the activity.
3. Click the marker to display the address.

## View Directions to the Next Activity on Your Route

When you complete an activity, you can view directions from your current location to the next activity.

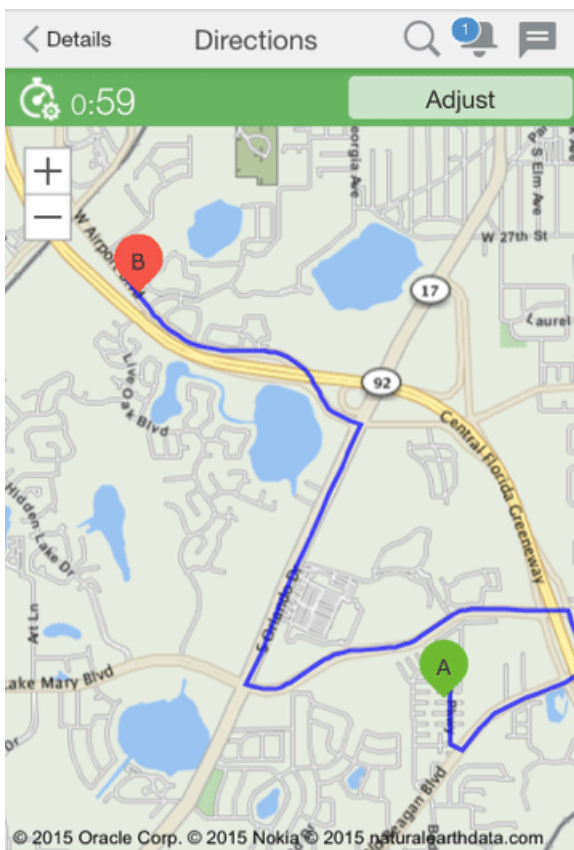
**Note:** When you view directions for the first activity of the day, the start location that is set up for you in Oracle Field Service displays.

To view directions to the next activity on your route:

1. Click the next activity on your route from the home screen.  
The **Activity details** screen displays.
2. Click **Directions**.

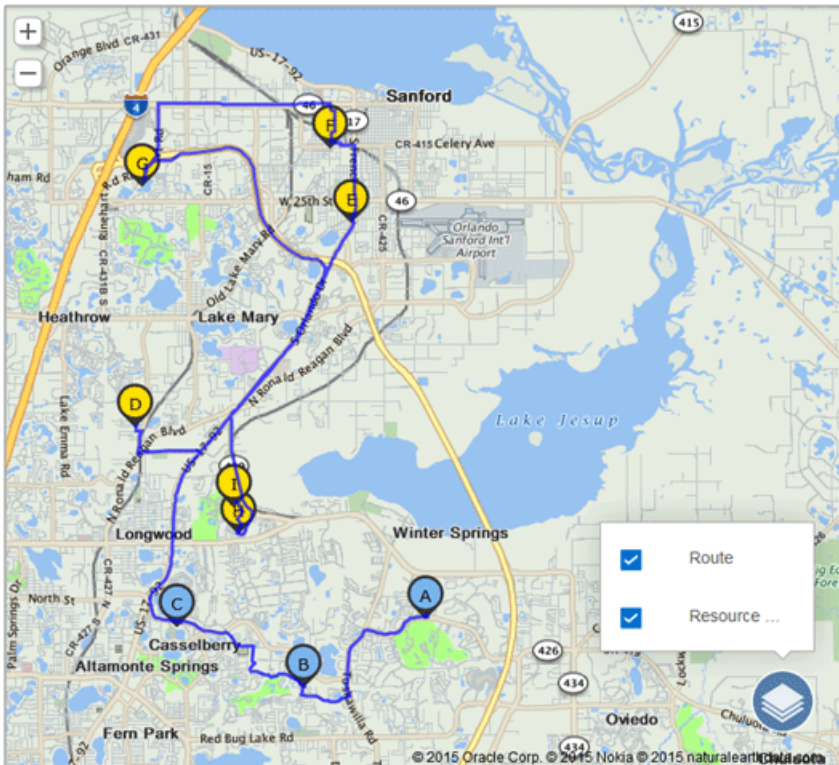
**Note:** Some customers may configure a navigation link plugin to launch a map application on a resource's device. This allows for turn by turn directions from the current location, and includes voice.

A map displays directions from the previous activity (A) to the next activity (B). If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown.



## Custom Map Layers


Map layers can display routes and resource locations, as well as demographic information such as population density, and the locations of gas stations, pipelines, and other geographical entities.



The following maps display custom map layers:

- Team
- Activity list
- Activity details

On the map, clicking the

 icon opens the list of all layers configured in the system. If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown.

Selecting a layer from the list adds the items contained in the layer to the map. You can select multiple layers to display their combined data. Deselecting a layer in the list removes its content from the map.

**Note:** Only the layers that are set as **Active** are shown here.

## Create an activity or a service request

You can create an activity or service request from a map layer and include the asset details and GPS location. In addition, you can interact with the asset directly and obtain historical and/or IoT data. The application can capture the correct location and asset properties automatically, if configured. As a technician or a dispatcher, you can open a plug-in or custom form from the map layer hint for a specific asset. Custom map layers are available for route and team maps within Core Application as well as in the installed iOS and Android apps.

## Create an Activity or a Service Request from a Custom Map Layer

In the utility organizations where map layers are commonly used, you can create an activity or a service request from a map layer and include the asset details and GPS location. You can also interact with the asset directly and obtain historical and/or IoT data about assets. The application can capture the correct location and asset properties automatically, if configured.

Example: A facility maintenance company wants its dispatchers and technicians to be able to create a maintenance activity from a map asset. The steps to perform in the application are:

1. Administrator configures the plug-in or the custom form. Let's say, your administrator has configured the 'Add maintenance activity' custom form.
2. Administrator configures the Shape hint button field for the plug-in or custom form, for the required custom map layer. For example, the Administrator has configured the Shape hint button field with the 'Add maintenance activity' custom form.
3. Dispatchers and technicians open the plug-in or custom form from the team map or the resource route map and create the activity or service request.

Steps to create an activity or a service request from a custom map layer:

1. Open the team map or the resource route map.
2. Click the layer icon and select the layer on which **Shape hint button** is configured. Based on the earlier example, select the layer for which the 'Add maintenance activity' custom form is configured.
3. Click the shape and then click the plug-in or custom form in the hint. Based on the earlier example, click 'Add maintenance activity'.

The configured plug-in or custom form opens. Based on the earlier example, the 'Add maintenance activity' custom form opens and lets you create the activity.

## View Route Maps When You're Offline

You can now view the map for a particular route even when your mobile is in offline mode.

With this new feature, you can:

- View the activity location
- View the pre-loaded titles of the map (if map is opened and then the network connection is off)
- View the activity list
- View the activity identifiers
- View custom map layers (if they were preloaded online)

### Menu item 'Map' always active

The Map option, which appears in Activity List and Activity Details screen, will be active even in offline mode now.

### Map tile in offline mode

When you open the map and then your mobile goes to offline mode, the map displays preloaded tiles of the map. If you open the map in offline mode, the whole map screen appears as a grid.

### Map layers in offline mode

The map layer must be loaded before your mobile goes to offline mode. If not, you get a notification when selecting a layer that you are offline.

## Time View

### Overview of Time View

You can manage and control the work of several resources at once on a mobile device on the Time view or the Manage page.

Time view is designed to delegate the responsibilities of a dispatcher, who generally works from the office using Oracle Field Service Core Application, to a field manager, who works with other resources in the field and uses Oracle Field Service Mobile for Android and iOS.

Similar to that of a dispatcher, a field manager's role is to monitor the activities resources (technicians), track possible jeopardy situations that might take place while on duty, and promptly contact the resources if it becomes necessary.

In time view, field managers can easily monitor routes and activities of several other mobile resources along with performing tasks of their own. Field managers can view the list of resources and their routes for several days, check resource status and work load, get information on shifts and work skills, and contact a specific resource or switch to that resource's interface.

### Access Time View

To access time view in Oracle Field Service Mobile for Android and iOS you must have at least two *resources* assigned to you as a user.

**Note:** Resources are assigned to a user in the **Users** screen in Oracle Field Service Core Application.

If there are no *groups* in Oracle Field Service Mobile for Android and iOS assigned to you as a user, you will be prompted to create a group after logging in to the application. You will be redirected to the **Group Details** screen with the corresponding notification displayed.

Click **Create** to start creating a group.

If you created at least one group, you will get directly to the Time View screen after logging in.



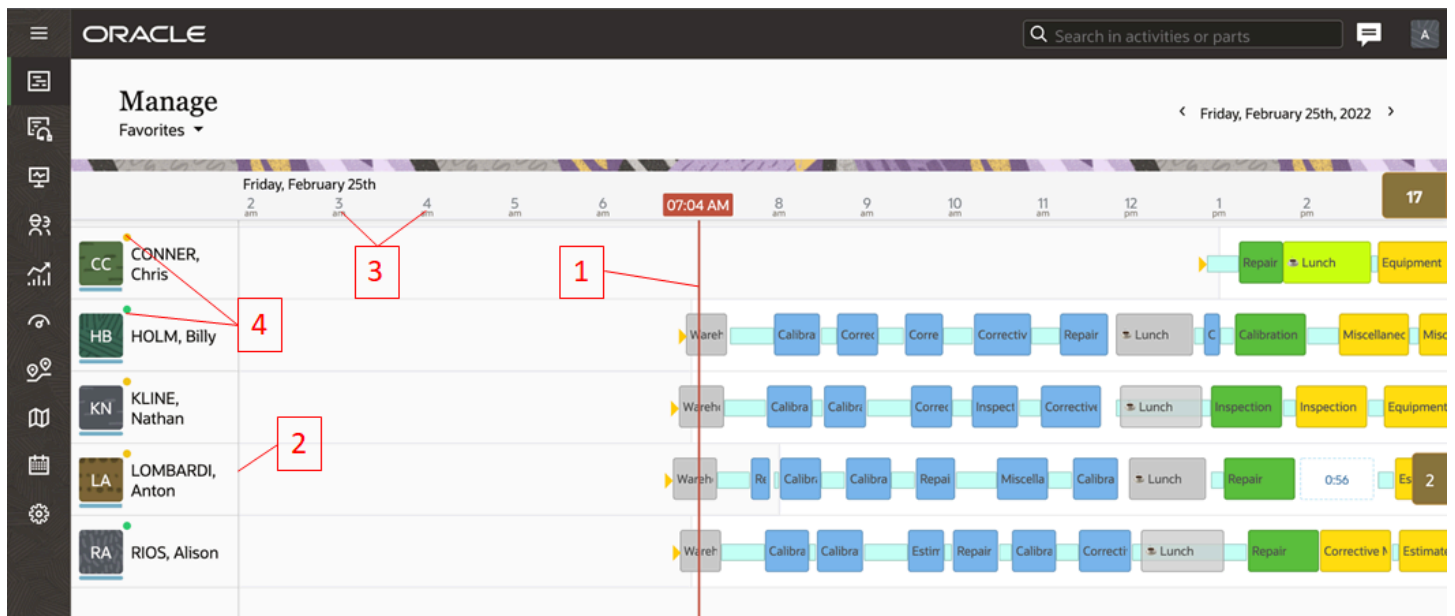
## Time View Area

The time view, or **Manage** area, allows a dispatcher or field manager to view all *resources* routes with their activities shown as color-coded blocks.

You can view the routes for a single day, as well as access the multi-day view on this page.

By default, the time view is scaled with the focus on the current time. However, you also can browse through different dates by scrolling across the screen. Or, alternatively, you can view multiple dates by pinching the screen on your mobile device to zoom in and out. Scrolling up and down allows you to view additional resources.

Essential time-view elements are shown in the following image:



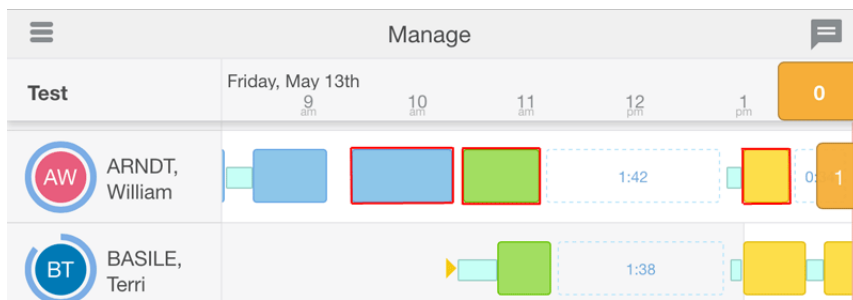
1 Time indicator: The vertical red line indicates the current time. The time corresponds to the time zone specified in your user settings. When Daylight Saving Time changes, the time at which it starts and ends is highlighted. A hint displays the number of hours by which the clock is turned forward or backward.

2 Date delimiter: Gray vertical dash lines specify the boundaries between the days.

3 Date indicator: For each day currently displayed in time view, a date indicator displays in the top-left of each day section. The date indicator is shown in the long-date format set for the user.

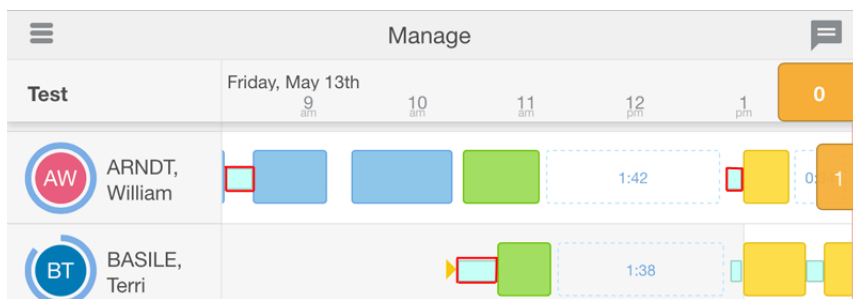
4 Offline/Online status indicator: A green solid circle indicates that the resource is online and a yellow solid circle indicates that the resource is offline. This icon is visible only to users that have the Collaboration permission enabled for their user type.

Ordered activities for each resource are represented as color-coded blocks on a resource's route. The colors displayed in the blocks are fixed. You can find more information about the color codes in the **Activity Color Codes** section. For this view, the colors are not changed based on what is configured for the particular Activity Type.



The length of the blocks is relative to activity duration (the longer the block, the longer the activity it represents). The activity label shown inside activity blocks is configured in the **Activity time view label** context in Oracle Field Service Core Manage Service.

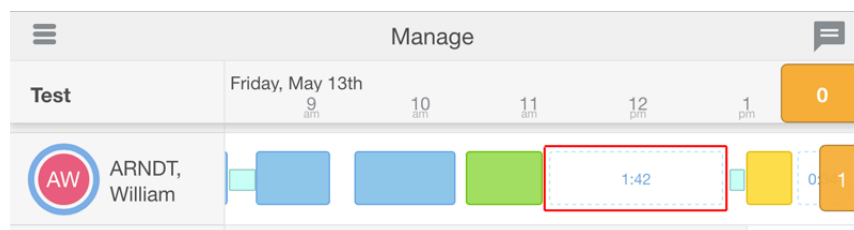
The light blue blocks represent travel time to activities as well as the final travel time, if the travel time is foreseen.



The length of the blocks is relative to travel duration (the longer the block, the longer the travel time).

The white blocks in a route represent idle time of a resource with the idle time duration shown inside.

**Note:** Idle time is not always explicitly shown in time view. If its duration is less than the minimal preset value (**Idle time minimal**), the idle time will show as gaps in a route rather than distinct blocks. You can define the **Idle time minimal** on the **Display** screen in Oracle Field Service Core Manage Service.

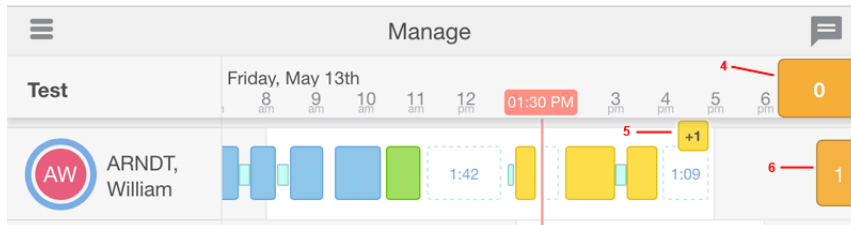


The yellow arrows on the route indicate the time of route activation (a right-headed arrow or the first of the two consequent right-headed arrows), reactivation (the second of the two consequent right-headed arrows, if applicable), or deactivation (a left-headed arrow).

The white (not shaded) area represents the working time of a resource, while the shaded area indicates non-working time (for example, vacation or sickness).

Areas highlighted in pale yellow represent on-call shifts.

Tapping on the larger orange counter (4) displays a list of not-assigned activities grouped by buckets.



**Note:** This indicator counts only scheduled activities for today (both ordered and not ordered).

For each bucket in the list, the following information is presented:

- Bucket name
- Number of not assigned scheduled activities for today (in the top right)
- Total: the total number of not assigned activities (both scheduled and non-scheduled)

Tapping on the bucket name will take you to the activity list of the selected bucket. Alternatively, tapping anywhere outside the panel will close it.

Tapping on the numbered yellow counter (5) displays a list of not-ordered activities. Tapping the smaller orange counter (6) displays a list of non-scheduled activities.

#### Related Topics

- [Activity Color Codes](#)

## Time View User Menu

You can use the user menu to configure your user settings and log out.

Tap the menu icon in the top-left corner of the page to access the menu.

The menu contains the following items:

- Manage: Displays the time view (**Manage** screen)
- Maps: Displays the locations of the resources
- Calendars: Displays all resource calendars
- Resources: Displays all the resources information

Tap the menu icon or anywhere outside to close the menu.

### Related Topics

- [Assign an Avatar](#)

## Time View Resource List

The time-view resource list provides various details about the resources with which you are currently working.

Icons indicate the following about a given *resource*:

- If the resource is online.
- If the resource is available for accepting a new task.
- If there are any issues with the resource's route.

A resource hint displays additional resource details, as well as essential links.

The resource photo shows the user for which the current resource is set as the main resource.

**Note:** The user-resource relationship is configured with the **main resource** property in the **Users** section of the Edit Resource page.

Resource initials are displayed in place of a photo, if:

- There is no user for which the current resource is set as the main resource.
- There is no user photo available.
- The user photo was not downloaded completely.

If any resources have identical initials, predefined background colors are automatically selected to distinguish them from one another.

**Resource name:** Displayed next to the photo on the right. Resource name will be shown or hidden depending on the width of the screen.





**Resource status in Oracle Field Service Collaboration Service:** A yellow or green circle in the top left of the resource photo. Green indicates that the resource is online; yellow indicates that the resource is offline.

If a resource is not available in Oracle Field Service Collaboration there is no status indicator. This might occur in the following situations:

- The user to which the resource is assigned as the main resource does not have access to Oracle Field Service Collaboration Service.
- The user to which the resource is assigned as the main resource is not included in your Oracle Field Service Collaboration Service user's contact list.
- The resource is not associated with any user. That is, no relationship has been set in the **main resource** property).

**Note:** The Oracle Field Service Collaboration Service indicator shows the current status of the resource, and is not dependent on the date selected when in the time view.

**Resource's route status and workload:** A circle around the resource photo that indicates the resource's status and workload. The color of the circle indicates the route status for the current day.

Color Code	Description
	The route is not activated
	The route is activated or reactivated
	The route is deactivated
	There are alerts in the route (regardless of route status)

The length of the circle indicates the resource's workload for the day. A complete circle indicates a 100% load, while no circle indicates that there are no regular activities assigned for the day. The workload indicator reflects only those activities within regular working time and does not factor in any workload within on-call shifts.

The workload indicator is subject to browser restrictions: for older browser versions which do not support Scalable Vector Graphics (SVG) image format, the workload indicator will not be shown. This restriction applies, for example, to Internet Explorer 8.

**Note:** Route status reflects the current state, and is not dependent on the date selected on **Time View**.

**On-call indicator:** A yellow telephone icon in the bottom right of the resource photo indicates that the resource is currently working on-call.

## Activity Pools

Each resource has three activity pools – scheduled, non-scheduled, and not-ordered.

- A *scheduled activity* has a specific date and time.

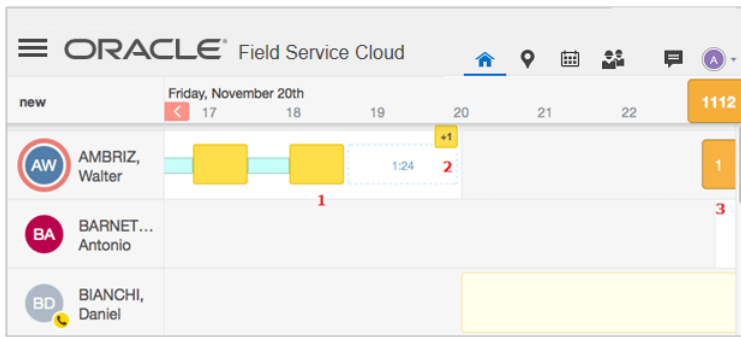
These activities are shown as color-coded bars representing activities of different statuses (1).

- A *not-ordered activity* has a specific date, but has no definitive place in the route.

These activities are shown as a square with the number of not-ordered activities at the end of your working time (2).

- A *non-scheduled activity* has no definitive date and time.

These activities shown as a tab with the number of non-scheduled activities at the right edge of the screen (3).



You can optimize the processing of non-scheduled activities to improve your mobile app performance. Even if you have large number of non-scheduled activities on the route, only limited number is displayed when you log in to the mobile app. The maximum number of non-scheduled activities to be displayed is set in the 'Mobile activities count' field. To access more non-scheduled activities, you should click the 'View more' link and same limited number of activities configured in the "Mobile activities count" field will be added to the list. In offline mode, you will have access only to those non-scheduled activities that were downloaded to your mobile device before your mobile was offline. 'View more' link is disabled in offline.

When any of your activities in the not-ordered pool has an alert, the pool-symbol color changes to red.

To view the list of activities within a pool, click or tap that pool symbol. The list header displays the type of activities it contains (non-scheduled or not-ordered), the number of such activities, and the date (for not-ordered activities)

To display the hint for an activity in the list, click or tap that activity.

To close the activity list, click or tap the activity header or on the screen anywhere outside the hint.

## Activity Movement

You can move activities between pools of the same resource, within the route of a resource, and between resources.

To move an *activity*, click or tap and hold it and then drag it to the new destination. When you drag the activity, all possible destinations are outlined with dotted lines and the destination you select is highlighted in green.

If your activity move violates any constraints for itself or for other activities, a warning window displays and you will be asked to confirm the move.

To close the confirmation window or abort the move, click **Don't Move** or tap the "X".

The system still allows you to move the activities despite the warnings. Click **Move** to proceed with the move or **Do Not Move** to abort it.

# Unrouted Activities

## About Working with Unrouted Activities

You can use the **Nearby Activities** page to view the unrouted activities, either in a list or on a map. Depending on your user type, you might also be able to move the unrouted activities to your route.

## Find Nearby Activities

Field resources equipped with mobile devices can consult a map that displays their route with any pending and unassigned activities close to their current location. Users configured for self-assignment can add nearby activities to their routes.

**Note:** To use this feature the **Self Assign** option must be selected for your user type.

1. Open the Route map.
2. Click the layer icon and select **Nearby Activities**

A map with the nearby activities displays. The map includes your scheduled (numbered) activities and colored flags that indicate the status of nearby activities that are unassigned. Both the size of the flag and its color indicate the urgency of the activity.

- Large markers indicate an activity that's SLA-critical.
- Smaller markers indicate activities that aren't as critical.
- Zoom in to see all activities.
- Zoom out to eliminate the less critical flags from the display.

3. Click **List** to display groups of activities.

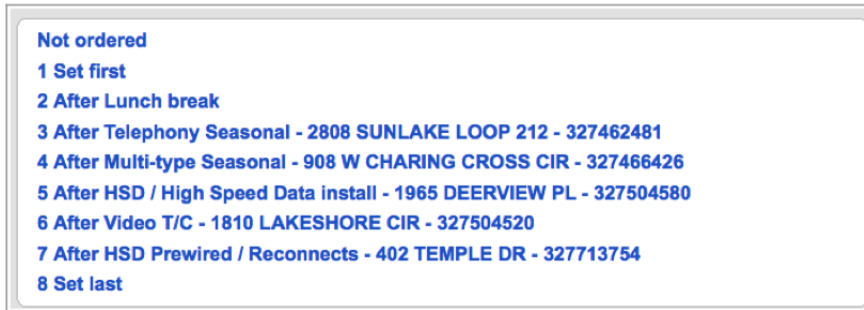
**Note:** Devices with larger screens display both the map and the list.

The groups are based on these:

- **Distance:** This group contains all unrouted activities listed by order of distance from your current location. Activities that are closest to you are listed first followed by activities that are farther away.
- **Time bounds:** This group contains all unrouted activities listed in order by SLA window expiration. The activities that will expire the soonest are listed first under subheadings, such as **Expires in 1 day**, **Expires in two days**, and so on, with 30 days being the maximum expiration period.
- **My route:** This group includes the activities that are already assigned to your route. You can't move these activities.

4. To filter the activities, click **View**. Select a predefined filter or Ad hoc Filter and add the required criteria. Click **Apply**. This filter option is similar to the filter option available in the Dispatch Console. The filter criteria that you select on this map are applied only to the nearby activities shown on the map. They aren't applied to your route activities.
5. Click an item in either the map or the list to display a hint box that includes more information, and a **Move** link.

6. Click **Move** to display the **Activity Move** page:



Use this page to position this activity relative to the other activities on your route.

7. On the confirmation page, click **OK** to remove the activity from the pending list to your route

## Inventory

### View Inventory

You can view the inventory associated with each job on your route as follows:

1. Click or tap an activity on the Inventory home page.

**Note:** A message in red displays if you are missing any inventory required for that activity.

The **Activity details** page displays.

2. Click or tap an **Inventory** to view the inventory list.

The **Inventory List** page displays. Inventory at the customer location is listed under a green house icon. All of the inventory on the technician's truck is listed under a yellow truck icon.

3. Click or tap the serial number to display the **Inventory details** page.

The page shows the inventory type, and includes options to deinstall or exchange the equipment.

### Find Inventory

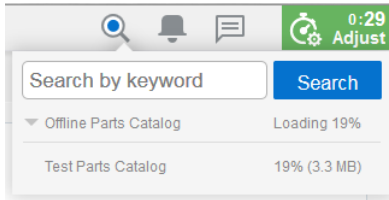
You can search the Parts Catalog for inventory that you need for installation, maintenance, or repair jobs.

Both field managers and resources can search the catalog. If you are a resource, you can predict the parts that you need on your truck. However, you can know the parts you need for sure only at the customer's site. .

You can view the Parts Catalog updates every 30 minutes after launching the application. You can view the updates both offline and online.



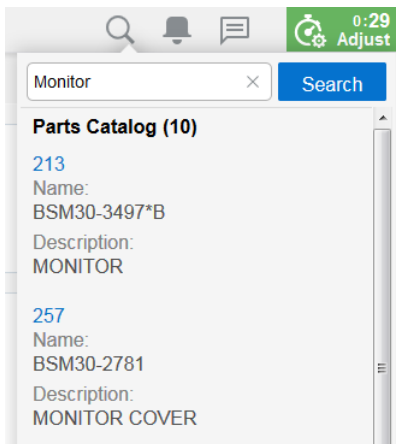
1. Do one of these:
  - (Field manager) From the **Manage** (time view) page, first select a resource and then click or tap the clipboard icon to access the **Activity details** page.
  - (Resource) Ensure that you are viewing your home page.
2. Click or tap the **Search** (magnifying glass) icon to open the search window.



**Note:** When you perform search for the first time, the Parts Catalog starts to download, and the progress indicator changes as the download progresses. You can notice that the progress indicator displays

The first time you perform a search, the Parts Catalog starts to download, and the top (percentage) indicator changes as the download progresses. The bottom (cache) indicator tells you how much memory is being consumed. When the download completes, the progress indicator displays **Downloaded** and the cache indicator displays the total memory consumed. Once cached, the Parts Catalog is available for use when working offline.

3. In the Search box, enter the name of the part to search, for example, “Monitor”, and then click or tap **Search**. A list of results displays.



4. From the search results list, click or tap a part number to display the **Catalog item details** page.

#### Related Topics

- [Add, Exchange, or Uninstall Inventory](#)
- [Send Information to a Piece of Inventory](#)

## Add, Exchange, or Uninstall Inventory

When you install or uninstall *inventory*, you move items from your resource pool to the customer pool, and vice versa.

1. Click an activity on your home page.  
The **Activity Details** page displays.
2. Click **Inventory**.  
The **Inventory list** page displays.
3. Click the inventory that you want to add, exchange, or uninstall to display its serial number, and then click the corresponding number.  
The **Inventory details** page displays.

**Note:** Inventory actions generally only appear after an activity has been started.

4. Click **Add, Exchange, or Deinstall**.  
If this is an exchange, the **Exchange inventories** page displays. The page contains a list of inventory items and their associated serial numbers.
5. Click the serial number of the inventory that you want to replace.  
The page updates to show the inventory installed at the customer's location, as well as the inventory in the resource pool that you are carrying in your vehicle.

**Note:** If you make a mistake, you can undo an install or deinstall. Click on the serial number of the device and perform the opposite action. For example, click **Deinstall** if you installed a device in error.

6. Enter the quantity of the inventory you are adding, installing, or deinstalling in the Quantity field.  
If this is non-serialized inventory and you enter a value that exceeds the quantity precision that's configured, then the precision is rounded off. For example: Quantity precision for an Inventory type = 2. You enter 1.4552; this is rounded off to 1.46. In general, the half-up rounding rule is applied; that is, 0.5 becomes 1 and 0.4 becomes 0. If you enter extra zeros after the decimal point, then all trailing zeros are trimmed and not displayed in the inventory pool. If you try to install more non-serialized inventory than you have in the pool, then the message, 'The quantity 6.5 exceeded your available quantity of 5. Are you sure you want to proceed?' is displayed.
7. Click **Submit**.

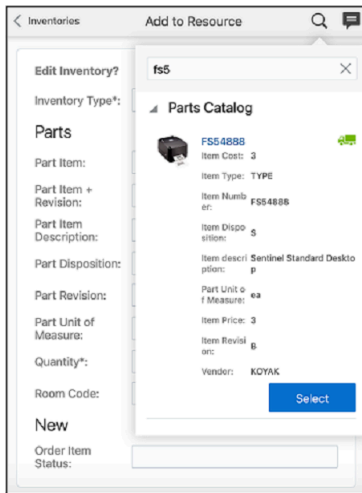
## Receive Inventory

There are cases when a technician receives inventory from another technician or gets it from a warehouse.

When an inventory item that you have ordered arrives, you must receive it and add it to your resource pool. Only then, you will be able to add it to an activity.

1. Go to your **Dashboard** and click **Inventory**.  
The **Inventory list** page appears.
2. Click **Add to resource**.

3. Fill up the required fields using Parts Catalog.
  - a. Open Search
  - b. Find the required inventory manually or using Barcode scanner.
  - c. Click Select near the appropriate item.
4. Click **Submit**. The selected item is added to your resource pool.



## Send Information to a Piece of Inventory

When inventory has been installed and specifically configured, you can send certain information to it using a service request.

For example, if the piece of inventory is a cable box, you might need to send the list of channels or you might send a test message to make sure that the connection is working.

1. Mark the piece of equipment as installed in the application.
2. From the list of the installed equipment, click the serial number of the piece of inventory to which the information will be sent.  
The **Inventory details** page displays.
3. Click **Hit Inv**.  
The **Send request** page displays.
4. Select the request and hit types from the drop-down lists.
5. Click **Submit**.  
The page refreshes with the request details.

### Related Topics

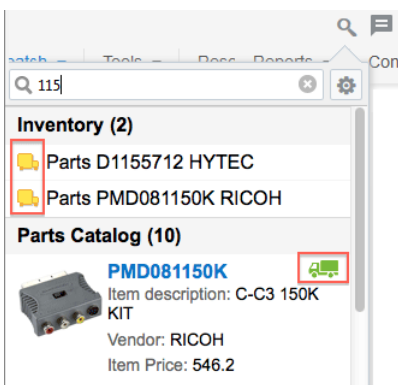
- [Add, Exchange, or Uninstall Inventory](#)

## Search the Parts Catalog

You can use the search function to search for inventory in the Parts Catalog and in all other inventory pools.

The search key that you enter must contain a minimum of three symbols. Leading and trailing spaces are not included in the search key. The key is then matched against all inventory pools associated with the current resource, and against the inventory in the Parts Catalog.

**Note:** If the search key is only found in one source, the section for the other does not display. This screenshot shows the Parts Catalog after you have searched for inventory:



The search results in the **Inventory** list are marked with pool icons to help you easily determine the pools in which the inventory item is found. If an item found in the Parts Catalog also happens to be in the resource's pool, the item is marked with a truck icon.

If you select an item from **Inventory**, the Inventory details page is displayed. If you select an item from the Parts Catalog, the **Catalog item details** page is displayed. This page displays the following information:

- General information about the selected catalog item
- A **Linked items** section that suggests items that you can use instead of the selected Parts Catalog item. Click a linked item. A page with the details of the linked item is displayed.
- An **images** section that shows available images of the selected item


If the selected item can be found in the resource's inventory, the **Catalog item details** page also includes a **Quantity in the truck** section that shows how many units the resource has.

If you initiated the search from the **Add to installed** or **Add to deinstalled** dialog of a started activity, you can click **Select** to select any item found in the Parts Catalog.

This screenshot shows the Select button in Parts Catalog.


Parts H-D0295115 HARVESTED

**Parts Catalog (20)**



**PMD081150K**  
Item description: C-C3 150K  
KIT  
Vendor: RICOH  
Item Price: 546.2

Select



**H-D0295115**  
Item description: [RECON]  
PCB:BICU  
AP-C2:GW:ASS&apos;Y  
Vendor: HARVESTED  
Item Price: 0.01

Select

The item's properties also automatically populate the appropriate fields on the page from which you initiated the search.

<b>Add to Installed</b>	<b>Add to Deinstalled</b>	
Inventory type * :	<input type="text" value="Parts"/>	
Item model:	<input type="text" value="PMD081150K"/>	
Vendor:	<input type="text" value="RICOH"/>	
Notice:	<input type="text"/>	
Price:	<input type="text" value="546.2"/>	
		<input type="button" value="Dismiss"/> <input type="button" value="Submit"/>

## Find and Share Nearby Inventory

You can use the parts catalog and search the trunk stock of nearby technicians for the inventories that you require to complete the ongoing activity.

When you click **Find Nearby Inventory** from the Catalog Item Details page, the nearby technicians who have the inventories that are required in their inventory pool are shown in the Find Nearby Inventory page. You can click **Start**

**Chat** on the Find Nearby Inventory page to initiate a group message with the identified technicians, chat with the identified technicians, and request them to spare the requested inventory or part for the ongoing activity.

The technician willing to spare the requested inventory, may use the Share Location option in Collaboration to share a common location (from where you can obtain the requested inventory) or the technician can drop the inventory at your location. Also, you can visit the technician's location to obtain the inventory. However, when you meet the technician, the Share Inventory option in Collaboration is used to obtain the requested inventory or part details.

**Note:** The Parts Catalog module must be uploaded in Oracle Field Service to utilize this feature. To configure the Find Nearby Inventory button, see *Add the Find Nearby Inventory Action to Part Details page* section in the Administering Oracle Field Service Guide.

To locate nearby inventories:

1. Log in as a technician.
2. Search for the inventory in the search window with the Parts Catalog module enabled.
3. Click the part to view the details.
4. Click **Find Nearby Inventory**.  
A list of technicians who have the inventory in their trunk stock is displayed.
5. Select the technicians that you want to contact.  
The Start Chat link is enabled.
6. Click **Start Chat**.  
The broadcast message with the selected technicians is initiated.
7. Click the > icon to share the inventory with the technicians.

## Track the Caching Process of Parts Catalog

You can track the current status and progress of the Parts Catalog caching process. The caching progress is used to calculate how long a resource has to stay online before leaving an area with reliable level of connectivity.

### Before you start

Prerequisites are as follows:

- For Setup environments with Parts Catalog containing 100000 or more items, the total amount of raw items data must be more than 10 MB.
- Setup user must have access to the Parts Catalog module.
- Mobile devices must have Internet Explorer Mobile 11 (for Windows), and Chrome (for Android).
- Mobile devices must have the possibility to simulate low bandwidth connectivity.

### Here's what to do

1. Log in to the application.
2. Select any resource and click the Search icon.  
A progress indicator displays the status of the Parts Catalog caching process:
  - **Initialization**—Indicates that caching has just started.
  - **Loading**—Indicates that caching is in progress displaying the percentage of caching that has completed.

**Note:** When internet connectivity is relatively slow and a significant number of items exist in Parts Catalog, Loading status may show up to 30 or 60 minutes.

**Loaded**—Indicates that caching has completed.

## Resources

### Resource Calendars

As a field manager, you can view and update the working, non-working, and on-call time assigned to your resources from the **Calendars** page.

You also can view and edit resource-calendar information for an individual resource by clicking or tapping on their name in time view.

The **Calendars** page is a grid with resource names in the rows and dates in the columns. Your device displays columns depending on the size and orientation. By default, you can view the current date highlighted in red color in the first column and the total number of hours of all resources in the group in column header.

Calendars  
Florida

< Tuesday, April 5th, 2022 >

Q Name or ID		April 2022													
		Tue 05	142	Wed 06	142	Thu 07	142	Fri 08	142	Sat 09	142	Sun 10	142	Mon 11	142
☆ Favorites	AW ARNDT, William	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9
☆ Florida	BT BASILE, Terri	1 p - 6 p	5	1 p - 6 p	5	1 p - 6 p	5	1 p - 6 p	5	1 p - 6 p	5	1 p - 6 p	5	1 p - 6 p	5
☆ Nearby	DK DISNEY, Kathleen	7 a - 6 p	11	7 a - 6 p	11	7 a - 6 p	11	7 a - 6 p	11	7 a - 6 p	11	7 a - 6 p	11	7 a - 6 p	11
☆ South Florida	HK HOLT, Kelly	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9	7 a - 4 p	9
☆ Southern MD	KN KILBURN, Norman	8 a - 5 p	9	8 a - 5 p	9	8 a - 5 p	9	8 a - 5 p	9	8 a - 5 p	9	8 a - 5 p	9	8 a - 5 p	9
Supremo Fitness															

You can scroll left or right to view past or future days by swiping a finger along the page. As you scroll along the page, you can notice that additional columns get loaded. If you want to view the current date without swiping your page, you can use the red colored arrow present in the date column.

If you scroll to view any future date and you want to return to the current date, use the left directional arrow present in the date column.

The screenshot displays the Oracle Field Service Calendars interface. At the top, there is a navigation bar with a menu icon, a search icon, a chat icon, and a user profile icon labeled 'A'. Below the navigation bar, the title 'Calendars' is shown, followed by 'Favorites' and a date selector 'Apr 7th'. The main content area features a calendar grid for April 2022. The grid shows the current date as April 7th (Friday) and the next day as April 8th (Saturday). The calendar is organized into columns for each day of the week. The resources listed on the left are AW, BT, DK, HB, and OA. Each resource has a corresponding row in the calendar grid. The grid cells contain time ranges and the number of resources assigned to that time slot. For example, for resource AW, the time range is 7 a - 4 p and the number of resources is 9. The grid is organized into columns for each day of the week, with the current date (Apr 7th) highlighted in the top right corner.

	April 2022	Sat 09	Sun 10
AW	7 a - 4 p 9	7 a - 4 p 9	7 a - 4 p
BT	1 p - 6 p 5	1 p - 6 p 5	1 p - 6 p
DK	7 a - 6 p 11	7 a - 6 p 11	7 a - 6 p
HB	7 a - 4 p 9	7 a - 4 p 9	7 a - 4 p
OA	7 a - 4 p 9	7 a - 4 p 9	7 a - 4 p



Similarly, if you scroll to any earlier date and you want to return to the current date, use the right directional arrow.

☰
🔍
💬
A

## Calendars

Favorites ▾ Apr 2nd ▾

	April 2022			Sun 03			Mon 04	
	>	43		43				
AW	7 a - 4 p	9	7 a - 4 p	9	7 a -			
BT	1 p - 6 p	5	1 p - 6 p	5	1 p -			
DK	7 a - 6 p	11	7 a - 6 p	11	7 a -			
HB	7 a - 4 p	9	7 a - 4 p	9	7 a -			
OA	7 a - 4 p	9	7 a - 4 p	9	7 a -			

Now, let's understand how you can set the date range in the calendar. To set a date range, you must define business-rules settings on the **Business Rules** page. This table explains commonly used terms in Resource Calendar.

Time	Meaning	Representation
Working Time	Working time of the resource	Pale Turquoise with its duration in a deeper color.
Default schedule	Working time configured for the whole organization, division, or for a particular geographic region	Darker shade.
Individual schedule	Working time configured for an individual resource	Lighter shade.
On-call	Time in which a resource is working on-call support	White with Yellow telephone icon.
Regular and On-call on the same day	Resource has regular and on-call tasks on the same day	The cell is divided into two parts with each part containing information about one schedule.
Regular and On-call overlapping in same period	Resource has regular and on-call tasks at the same time	When there's an overlap, on-call only displays for the period that does not overlap with the regular calendar.
Non-working	Vacation time	Blank cell.

A resource can have a default schedule or an individual schedule. A default schedule is the working time configured for the whole organization, division, or for a particular geographic region. In other words, a default schedule is the working time added at the Organization unit or Bucket level, which is inherited by the child resources. An individual schedule is the working time applied to an individual resource.

You can view the total available working time of the resources in a group from the column header. The time is expressed in any one of these units of measurement:

- Man hours — default unit of measurement
- Points — generally used if the company uses points in workforce management
- Scheduled — number of resources with working calendars for a particular day
- FTE (full-time equivalent) — sets the standard duration of a working day, as defined by the full-time equivalent parameter on the **Business Rules** page.


You can select the units of measurement, which are most suitable for your needs by clicking a column header. The column header produces a hint containing all available units of measurement with their equivalent values for the selected column.

**Note:** If you change the units of measurement in any column, all the columns present in the grid will change.


If you have the pre-loaded units, the hint shows planned working time-values. The planned values display in the units of measurement in which they were loaded, and the hint contains an additional Variance column, which shows the difference between the actual and planned values. If no plan is loaded, the Planned column shows dashes instead of actual values.

## Find Resource Information

The **Resource Info** page is a dashboard for field managers that displays an overview of a *resource's* data, and allows them to edit any of the information listed.



When you click  in the resource hint on your web browser, the **Resource Info** page displays. This screenshot shows the **Resource Info** page that contains general information about a resource.

↑ Calendars

 **ARNDT, William**  
Supremo Fitness > FL, USA

---

### Locations

-  Warehouse  
11350 University Blvd  
Orlando, FL 32817
-  Warehouse  
11350 University Blvd  
Orlando, FL 32817

### Resource Calendar




< April 2022 >

Mon	Tue	Wed	Thu	Fri	Sat	Sun
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	


### Information

External ID	33001
Name	ARNDT, William
Login	william.arndt
Status	Active
User Type	Technician
Resource type	Technician
Phone	555003300100
Email address	33001@sunrise.demo
Message Language	English
Time zone	Eastern
Time format	12-hour
Date format	mm/dd/yy
Gender	Male
Default Export Format	Comma-separated (csv)
Design Theme	Redwood
Long Date Format	weekday, month day, year
Organization	Supremo Fitness

### Work Skills

100%		Commercial
100%		Estimate
100%		Residential

### Work Zones



No Restrictions

### Resource Inventory

The page contains these blocks of information:

- General information (includes basic information about the resource, such as name, photo, e-mail address, and phone number)
- Additional information (includes time zone, time format, and date format)
- Locations (contains the list of locations assigned to the resource)
- *Resource Calendar* (shows the resource's work schedule for the month)—Working days in blue, Non-working days have white background color, Workload (a dot is displayed for the date if there is any other activity except mass-repeating activity), On-call icon to indicate there is a on-call shift for the selected date. if no working calendar has been specified for the selected resource, shift information is calculated according to the parent resource calendars or default company calendars, and the calendar can be shifted one month earlier or later by tapping the left or right arrow).
- Work skills (includes a resource’s work-related skills and their level of expertise with those skills)
- Work zones (contains the work zones assigned to the resource; work zones assigned for the current day are color-coded)

**Note:** The data blocks that display on the **Resource Info** page correspond to the resource settings that are configured for the resource. For example, if no locations or work skills have been defined for a resource, the **Locations** and **Work Skills** blocks are hidden.

You can edit the information that displays in each block on the page by tapping or clicking the block’s title.

## Edit Resource Information

A field manager can review and revise a resource’s employee information, as well as information about work skills, work zones, work locations, and calendars.

From the **Resource Info** screen, tapping or clicking the title in any of the information blocks displays dialog box boxes in which you can add, change, or delete information specific to that block.

**Note:** The actual information that is displayed depends on what has been configured for your environment. If two users are linked only by teamwork and do not have any association with each other, then the users will not have access to each other’s resource information.

Information block:	Information you can view and edit:	Associated screens and/or dialog box(es):
<b>General information</b> (name of the resource)	<ul style="list-style-type: none"> <li>• Name</li> <li>• External ID</li> <li>• Phone</li> <li>• Email address</li> <li>• Status (active or inactive)</li> <li>• Resource type</li> <li>• Message language</li> <li>• Time zone</li> </ul>	<b>Screen</b> <ul style="list-style-type: none"> <li>• Edit Resource Info</li> </ul>

Information block:	Information you can view and edit:	Associated screens and/or dialog box(es):
	<ul style="list-style-type: none"> <li>• Time format (12- or 24-hour)</li> <li>• Date format</li> </ul>	
<b>Additional information</b>	<ul style="list-style-type: none"> <li>• Name</li> <li>• External ID</li> <li>• Phone</li> <li>• Email address</li> <li>• Status (active or inactive)</li> <li>• Resource type</li> <li>• Message language</li> <li>• Time zone</li> <li>• Time format (12- or 24-hour)</li> <li>• Date format</li> </ul>	<p><b>Screen</b></p> <ul style="list-style-type: none"> <li>• Edit Resource Info</li> </ul>
<b>Locations</b>	<ul style="list-style-type: none"> <li>• Daily locations                             <ul style="list-style-type: none"> <li>○ Start</li> <li>○ End</li> <li>○ Home</li> <li>○ Days</li> </ul> </li> </ul>	<p><b>Screen</b></p> <ul style="list-style-type: none"> <li>• Locations</li> </ul> <p><b>Dialog box</b></p> <ul style="list-style-type: none"> <li>• Daily Locations</li> </ul>
	<ul style="list-style-type: none"> <li>• Location assignment                             <ul style="list-style-type: none"> <li>○ Day</li> </ul> </li> <li>• Start</li> <li>• End</li> <li>• Home</li> </ul>	<p><b>Screen</b></p> <ul style="list-style-type: none"> <li>• Locations</li> </ul> <p><b>Dialog box</b></p> <ul style="list-style-type: none"> <li>• Location Assignment</li> </ul>
	<ul style="list-style-type: none"> <li>• Shared locations (view only)</li> </ul>	<p><b>Screen</b></p> <ul style="list-style-type: none"> <li>• Locations</li> </ul>
	<ul style="list-style-type: none"> <li>• Resource locations                             <ul style="list-style-type: none"> <li>○ Label</li> <li>○ Address</li> <li>○ City</li> <li>○ ZIP/Postal Code</li> <li>○ State</li> <li>○ Latitude</li> <li>○ Longitude</li> </ul> </li> </ul>	<p><b>Screen</b></p> <ul style="list-style-type: none"> <li>• Locations</li> </ul> <p><b>Dialog box</b></p> <ul style="list-style-type: none"> <li>• Add Location</li> </ul>

Information block:	Information you can view and edit:	Associated screens and/or dialog box(es):
<b>Resource Calendar</b>	<ul style="list-style-type: none"> <li>• Shift                             <ul style="list-style-type: none"> <li>○ Overnight</li> <li>○ First</li> <li>○ Second</li> <li>○ Non-working time</li> <li>○ Custom working time</li> </ul> </li> <li>• Number of repeating days</li> <li>• Reason for non-working time</li> <li>• Time frame for custom working time</li> <li>• Points assigned to custom working time</li> </ul>	<p><b>Screen</b></p> <ul style="list-style-type: none"> <li>• Resource Calendar</li> </ul> <p><b>Dialog box</b></p> <ul style="list-style-type: none"> <li>• Add Location</li> </ul>
<b>Work Skills</b>	<ul style="list-style-type: none"> <li>• Work skills</li> <li>• Level of expertise</li> <li>• Temporary skill? (yes/no)</li> </ul>	<p><b>Screen</b></p> <ul style="list-style-type: none"> <li>• Resource Work Skills</li> </ul> <p><b>Dialog boxes</b></p> <ul style="list-style-type: none"> <li>• Add work skill</li> <li>• Edit work skill</li> </ul>
<b>Work Zones</b>	<ul style="list-style-type: none"> <li>• Work zones</li> <li>• Ratio</li> <li>• Temporary? (yes/no)</li> <li>• Start date</li> <li>• End date</li> <li>• Recurrence</li> <li>• Days between occurrences</li> </ul>	<p><b>Screen</b></p> <ul style="list-style-type: none"> <li>• Work Zones</li> </ul> <p><b>Dialog boxes</b></p> <ul style="list-style-type: none"> <li>• Add Work Zones</li> <li>• Edit Work Zone</li> </ul>

*Related Topics*

- [Change a Resource's Location](#)
- [Resource Calendars](#)
- [Update a Resource's Work Skills](#)
- [Update a Resource's Work Zones](#)

## Change a Resource's Location

A field manager can change a resource's default start, end, and home locations, and add new locations to existing ones.

To edit the resource location, the field manager can click or tap **Locations** on the **Resource Info** page. The field manager can perform these tasks on the **Locations** page:

- Click or tap the pencil icon to add the start, end, and home locations for specific days or for an entire week.

- Click or tap a day of the week to specify location assignments for that day.
- Click or tap the plus sign to add new locations to an existing list of locations.
- View the shared locations (cannot be edited).

## Change a Resource's Location Temporarily

You can define the start and end locations and the home zone center, for a week day and for any date. The locations for the selected dates are used in all types of routing including bulk, immediate, and urgent routing, and for calculating resource queues as well.

1. Click the hamburger menu and click **Resources**.
2. Select the resource for which want to update the location.
3. Click the **Locations** tile.
4. Go to the **Override Daily Locations** section.
5. To add an override, click the plus icon.  
The **Override Daily Location** dialog box appears.
6. Select the start location, end location, and home location.
7. Select the date for which you want to override.  
You can select any date in the future for up to 1085 days.
8. Click **Submit**.

An override is added for the selected date. Temporary locations older than 90 days are deleted automatically. The working time of a resource that is temporarily assigned to a different work zone is outlined with a gray box and a gray arrow pointing out in the Dispatch Console and Manage pages. Similarly, the working time of a resource that is temporarily assigned to the current work zone is outlined with a green box and a green arrow pointing in, in the Dispatch Console and Manage pages.

9. To cancel an override, click the minus icon.

## Update a Resource's Work Skills

A field manager can add and assign a work skill to a resource, and specify a level of expertise for the skill.

To update the resource work skills, the field manager can click or tap **Work Skills** on the **Resource Info** page. The field managers can perform these tasks on the **Resource Work Skills** page:

- Click or tap the plus sign to select one or more new work skills and add them to a resource's list of skills.
- Drag the slider to indicate the level of expertise (ratio) the resource has with the new work skill.
- Indicate whether the new work skill is temporary or permanent.
- Click or tap the work skill name or ratio bar and drag the slider to change the level of expertise for an existing work skill.
- Click or tap the minus sign to delete an existing work skill.



## Update a Resource's Work Zones

A field manager can assign specific work zones to a resource.

To update the resource work zones, the field manager can click or tap **Work Zones** on the **Resource Info** page. The field manager can perform these tasks on the **Resource Work Zones** page:

- Click or tap the plus sign to select one or more work zones from a predefined list and add them to a resource's list of work zones.
- Specify work zone details:
  - Drag the slider to adjust the probability (ratio) of a resource being assigned activities in a work zone.
  - Indicate whether the new work zone is temporary or permanent.
  - Select a start date.
  - Select an end date.
  - Indicate if the work zone occurs daily or weekly.
  - Specify the number of days between occurrences.
- From the **Resource Work Zones** page, click or tap a percentage to adjust the probability slider.
- Click or tap the minus sign to delete an existing work zone.

### Related Topics

- [Work-Zone Shapes](#)

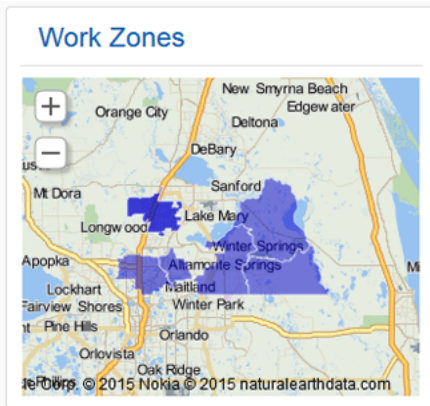
## Work-Zone Shapes

When any work zones are assigned to a *resource*, their shapes are displayed in the **Work Zones** block of the field manager's **Resource Info** screen.

A work zone is the defined geographical area within which a resource can perform activities. Work-zone shapes serve as visual representations of work zones on the map, and as a tool for yet more subtle definition of work zones. For example, if a company chooses to define its work zones by city names or postal codes, the work zones may be rather large. You also can divide a work zone into smaller geographic areas by attaching several shapes to it, allowing two teams to work in one work zone – one team in one “shape”, and a second team in another.

You use the **Work Zones** configuration feature to define work-zone shapes. You can enter the identifiers—typically ZIP codes associated with a particular work zone into the **Work Zone Shapes** field on the **Edit work zone** window.

Once configured, work-zone shapes display on the **Resource Info** page.



**Note:** Blue indicates that a work zone is active; grey indicates that it is inactive.

## Teamwork

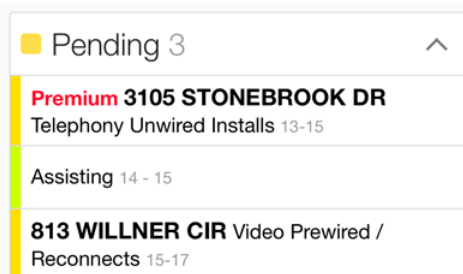
If you belong to a group of mobile employees, then you can assist one another using teamwork.

Some companies use teamwork to assign a trainee to work with a more experienced technician. Others use teamwork to assign a van to a technician.

Teamwork includes two roles:

- Team leader: The person who is being assisted.
- Assistant: The person who is assisting the team leader.

If you are the assistant for a particular activity, the time displays in your route as either **Assisting** or **Teamwork**.



If you are a team leader, the activity appears in your route as a regular activity.

You must start and complete teamwork activities the same way that you start and complete regular activities.

## Team Maps

Team maps display *routes*, positions, and locations of all *resources* in the *group*.

Clicking **Maps** on the **Manage** screen displays the team map.

The following data displays on the map:

- Resources' routes
  - Resources' current locations
  - Start and end point of each resource displayed only when you select each resource separately.
- Note:** A group map does not show the start and end points.
- Home zone of each resource
  - Map layers (for example, the locations of gas stations and pipelines). If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown.

Each team map has the following characteristics:

- Each *activity* is marked with the color corresponding to the activity status
- The status color codes are the same as those used to mark activities in the resources' routes
- Each activity is marked with the color corresponding to the activity status
- Routes are shown as differently colored lines, each representing a particular resource
- Activities belonging to a route have borders of the same color as the route, making it easier for the user to identify activities of the same route
- Clicking an activity marker opens the hint with the activity details
- Clicking **Details** displays the **Activity details** screen of the corresponding activity
- Clicking a resource marker opens a resource hint

You also can display a map showing only the resources' locations. To do this, click the Layer icon in the lower-left corner and ensure that only the **Resource** layer is checked.



In addition, clicking an activity on the **Manage** screen displays a hint that includes a thumbnail map of corresponding resource's current location.

### Related Topics

- [Custom Map Layers](#)
- [View Activity Location on a Map](#)

## Collaborate with Other Team Members

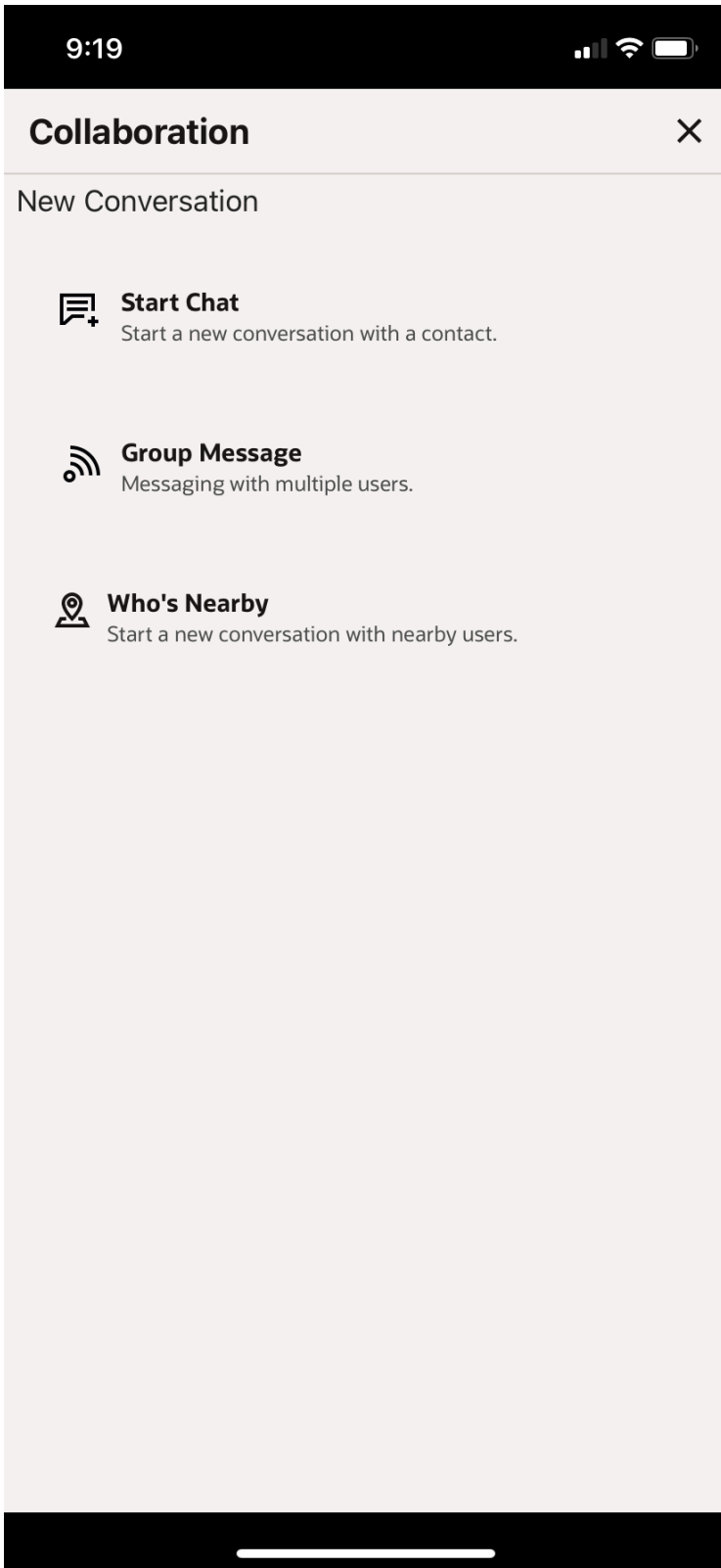
You can use the Collaboration feature to communicate and collaborate in real time with other members of your team.

From the **Collaboration** window, you can search for other members of your team, add them to your address book, and initiate a chat or call with her or him.

When you tap the **Collaboration** icon (



) located on the top right of the **Activity details** page, a window similar to these displays:



To:	Do this:
Search for contacts	<ol style="list-style-type: none"> <li>1. Tap New Conversation.</li> <li>2. Enter a contact name in the <b>Search Contact</b> field and press Enter.</li> </ol>
Start chatting with a contact	<ol style="list-style-type: none"> <li>1. Tap New Conversation.</li> <li>2. Click Start Chat, Group Message, or Who's Nearby.</li> </ol>
End a conversation	<ol style="list-style-type: none"> <li>1. Tap the <b>Actions</b> icon.</li> <li>2. Tap <b>Leave Conversation</b>.</li> </ol>
Invite a contact to chat	<ol style="list-style-type: none"> <li>1. Tap New Conversation.</li> <li>2. Select a contact from your address book or, search for a contact.</li> <li>3. Tap <b>Invite User</b>.</li> <li>4. Search for a contact or select one from your address book.</li> </ol>
Display Community history	<ol style="list-style-type: none"> <li>1. Tap the <b>Collaboration</b> icon.</li> <li>2. Tap <b>History</b>.</li> </ol>
See who's working near your physical location	<ol style="list-style-type: none"> <li>1. Tap New Conversation.</li> <li>2. Tap <b>Who's Nearby</b>.</li> </ol>
Display a contact's information	<ol style="list-style-type: none"> <li>1. Tap the <b>Collaboration</b> icon.</li> <li>2. Select a contact.</li> <li>3. Tap <b>User Info</b>.</li> </ol>
Share your location with a contact	<ol style="list-style-type: none"> <li>1. Tap the <b>Collaboration</b> icon.</li> <li>2. Select a contact.</li> <li>3. Tap <b>Share Location</b>.</li> </ol> <p><b>Note:</b> Tap <b>Modify</b> if you wish to change your location.</p> <ol style="list-style-type: none"> <li>4. Tap <b>Return</b> to send your location.</li> </ol>
Call a contact from your mobile device	<ol style="list-style-type: none"> <li>1. Tap the <b>Collaboration</b> icon.</li> <li>2. Start a new conversation.</li> <li>3. Select a contact.</li> <li>4. Tap the telephone icon to initiate the call.</li> </ol>
Display a contact's history	<ol style="list-style-type: none"> <li>1. Tap the <b>Collaboration</b> icon.</li> <li>2. Select a contact.</li> <li>3. Tap <b>History</b>.</li> <li>4. Enter a keyword and tap <b>Search</b>.</li> </ol>
Add or remove a contact from your address book	<ol style="list-style-type: none"> <li>1. Tap the <b>Collaboration</b> icon.</li> <li>2. Select a contact.</li> <li>3. Start a new conversation.</li> <li>4. Click the Actions menu and do one of these: <ul style="list-style-type: none"> <li>o Tap <b>Add From Address Book</b></li> <li>o Tap <b>Remove From Address Book</b></li> </ul> </li> </ol>
Broadcast a Group Message with Helpdesk operators	<ol style="list-style-type: none"> <li>1. Tap the <b>Collaboration</b> icon.</li> <li>2. Tap New Conversation.</li> <li>3. Tap <b>Group Message</b>.</li> <li>4. Tap <b>User Group</b> and select the appropriate group from the list.</li> <li>5. Tap <b>Next</b>.</li> <li>6. Tap <b>Broadcast</b>.</li> </ol>

To:	Do this:
	<ol style="list-style-type: none"> <li>7. Tap <b>Start Broadcast</b>.</li> </ol>
Add or rename a conference name	<ol style="list-style-type: none"> <li>1. Tap the <b>Collaboration</b> icon.</li> <li>2. Tap <b>New Conversation</b>.</li> <li>3. Tap <b>Group Message</b>.</li> <li>4. Tap <b>User Group</b> and select the appropriate group from the list.</li> <li>5. Tap <b>Next</b>.</li> <li>6. Tap <b>Conference</b>.</li> <li>7. Enter a name for a new conference chat or click the Menu icon, select the <b>Edit Conference Name</b> option to edit an existing conference chat name.</li> <li>8. Click <b>Save</b>.</li> </ol>

## Debrief Plug-In

### What's the Debrief plug-in?

Debriefing is the process of reporting time and materials used while performing an activity. You can use the Debrief button available on a started activity to add time, expense, or material information to an invoice report.

You can use the debriefing process to report this information:

- Labor: Includes travel time and working time (measured in hours)
- Parts: Parts and materials used while performing the activity
- Charges: Any extra charges such as tolls or parking (measured in money spent)

You can also generate an invoice and obtain the customer's signature. All parts, labor, and expense items are stored in the installed inventory pool of the corresponding activity. The invoice is saved as a PDF file to the file property of the activity. Be aware that the Debrief plug-in doesn't work in offline mode.

### Add Time or Labor

You can use the Labor option to add the time you have spent on an activity, including any overtime.

1. Log in to Oracle Field Service.
2. Start the required activity. Or, open a started activity.
3. Click **Debrief** on the **Activity Details** page.
4. Click **Add Charges** and select Labor.
5. Complete these fields:

Field	Action
Billing Type	Select the service for which you are adding labor. For example, Repair.

Field	Action
Billing Item	Select the sub-type for which you are adding labor. For example, Overtime.
Start Time	Select the time at which you started the activity.
End Time	Select the time at which you ended the activity.

Duration shows the difference between the start and end times and displays two decimal places for fractional hours. This is to support the rate, which is defined as the amount of money per hour.

6. Click **Submit**.

## Add an Expense

You can use the Expense option to add any money you have spent on an activity, such as parking fee or toll charges.

1. Log in to Oracle Field Service.
2. Start the required activity. Or, open a started activity.
3. Click **Debrief** on the **Activity Details** page.
4. Click **Add Charges** and select Expense.
5. Complete these fields:

Field	Action
Billing Type	Select the service for which you are adding the expense. For example, Repair.
Billing Item	Select the sub-type for which you are adding the expense. For example, Parking fee.
Amount	Type the amount that you have spent on the item.

The Description and Currency fields are populated automatically.

6. Click **Submit**.

## Add an Installed Part

You can use the Add Parts option to add the parts that you have installed for an activity. If you have installed or deinstalled parts for the activity, they are pre-populated as Added Parts and Returned Parts respectively in the list.

1. Log in to Oracle Field Service.
2. Start the required activity. Or, open a started activity.
3. Click **Debrief** on the **Activity Details** page.
4. Click **Add Charges** and select Add Parts.
5. Search for the required part and select it.



6. For a non-serialized item, select the type of activity in the **Billing Type** field and add the quantity in the **Quantity** field.
7. For a serialized item, select the type of activity in the **Billing Type** field and specify the serial number of the part in the **Serial Number** field.
8. Click **Submit**.

## Return a Part

You can use the Return Parts option to add the parts that you have deinstalled for an activity. If you have installed or deinstalled parts for the activity, they are pre-populated as Added Parts and Returned Parts respectively in the list.

1. Log in to Oracle Field Service.
2. Start the required activity. Or, open a started activity.
3. Click **Debrief** on the **Activity Details** page.
4. Click **Add Charges** and select Return Parts.
5. Search for the required part and select it.
6. To return a non-serialized item, select the type of activity in the **Billing Type** field and add the quantity in the **Quantity** field.
7. To return a serialized item, select the type of activity in the **Billing Type** field and specify the serial number of the part in the **Serial Number** field.
8. Click **Submit**.

## Generate the Invoice

After you finish capturing the debrief information, you can obtain your customer's signature and generate an invoice in PDF format.

1. Log in to Oracle Field Service.
2. Open a started activity.
3. Click **Debrief** on the **Activity Details** page.
4. Click **Sign and Save**.
5. Get the customer's signature in the **Customer Signature** field.  
If you are using a touch screen device, the app detects touch as the method to fill the signature. In such cases, you cannot use the mouse to fill the signature.
6. Click **Submit**.  
The plug-in closes, and the invoice is saved as a PDF file in the activity property for download and review. If you want to update the invoice, reopen the activity and perform the debriefing again, so that the new PDF file overwrites the old one.

# End Your Day

## About Ending Your Day

Before you end your day, you must deactivate your *route* and log out of Oracle Field Service.

Also, you must make sure that the data is synchronized before logging out of the application or locking your mobile device. You must check the header that displays one of these four statuses:

- **No text:** This status indicates that the network connectivity is available and there is no data present on the device to be synchronized. You can log out of the device.
- **Offline:** This status indicates that there is no network connectivity and no data is to be transferred to the server.
- **Sending data:** This status indicates that there is some data on the mobile device that needs to be synchronized. In this case, it is better to remain online till the data synchronization is complete.
- **Offline. Sync required:** This status indicates that the technician is offline and there is data that needs to be sent to the server.

## Deactivate the Route

Before you deactivate the *route*, verify that all of your activities have been completed or cancelled.

At the end of the day, you must deactivate your route, and all the activities must be listed in the **Closed** section of your home page. This notifies dispatch that you are no longer available to take jobs.

1. Click **Deactivate Route** on your home page.

The **Deactivate Route** option displays only when you mark all activities as **Closed** on the activities list.

**Note:** You must have managed any remaining pending activities according to your business rules - rescheduled to another date, cancelled, or not done. The **Deactivate Route** menu option will not appear if there are pending activities on the route.

2. Click **Yes** on the confirmation dialog box.

If your organization uses the **Overnight Work** feature, you must deactivate your route and sign out of the application. If you do not do these, you will see the previous day's date when you log in the next day.

## Log Out

To keep the information secure, you must log out of the application when you are finished for the day.

1. Click the avatar.

2. Click **Sign out**.

If your organization uses the **Overnight Work** feature, you must deactivate your route and sign out of the application. If you do not do these, you will see the previous day's date when you log in the next day.



# Revision History

This document will continue to evolve as existing sections change and new information is added.

## Revision History

Date	What's Changed	Notes
February 2023	<p>These topics are added:</p> <ul style="list-style-type: none"> <li>• Update Activities and Sync Offline After Overnight End Time</li> <li>• Use the Debrief Plug-In</li> <li>• Add Time or Labor</li> <li>• Add an Expense</li> <li>• Add an Installed Part</li> <li>• Return a Part</li> <li>• Generate the Invoice</li> </ul> <p>This topic is deleted:</p> <ul style="list-style-type: none"> <li>• Allow Offline Synchronization and Update Activities Overnight</li> </ul>	
November 2022	<p>These topics are updated:</p> <ul style="list-style-type: none"> <li>• Time View</li> <li>• Change a Resource's Location Temporarily</li> <li>• Edit a Favorite Group of Resources</li> <li>• Move an Activity Using the Assignment Assistant</li> <li>• Understand the Assignment Assistant User Interface</li> <li>• Inventory List Tab</li> <li>• Main Menu</li> </ul> <p>These topics are added:</p> <ul style="list-style-type: none"> <li>• Manage Page</li> <li>• Update an Activity Location by Repositioning the Pin</li> </ul>	
August 2022	<p>These topics are updated:</p> <ul style="list-style-type: none"> <li>• Log Out</li> <li>• Search for an Activity</li> <li>• Understand the Assignment Assistant UI</li> <li>• Move an Activity Using the Assignment Assistant</li> </ul> <p>These topics are added:</p> <ul style="list-style-type: none"> <li>• Main Menu</li> </ul>	

Date	What's Changed	Notes
	<ul style="list-style-type: none"> <li>• Scan NFC Tags</li> <li>• Capture Pictures Using In-App Camera Module</li> </ul>	
<p>May 2022</p>	<p>These topics are updated:</p> <ul style="list-style-type: none"> <li>• Add a Mass Activity</li> <li>• Add a Repeating Activity</li> <li>• Allow Offline Synchronization and Update Activities Overnight</li> <li>• Drag and Drop Activities Using Assignment Assistant</li> <li>• Field Resource Landing Page</li> <li>• Move Activity Warning Messages</li> <li>• Move an Activity Using Assignment Assistant</li> <li>• Overview of the Assignment Assistant</li> <li>• Time View Area</li> </ul>	
<p>February 2022</p>	<p>This topic is added:</p> <ul style="list-style-type: none"> <li>• Log In Using SSO</li> </ul> <p>This topic is updated:</p> <ul style="list-style-type: none"> <li>• Update Activity Location</li> </ul>	