

Field Service



Glossary

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Preface

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

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1 Glossary

Account

A company or any other similar entity being a prospective or an existing customer or a business partner. If the initial contact with a lead is successful, and the business potential is established, such lead is used to create an account.

Access Hours

Pre-calculated *access schedule* for the day for which an activity is scheduled. Access hours are calculated in the time zone of the activity provider.

Access Schedule

Set of time intervals, *access hours*, or two intervals per week day when an asset such as a building or equipment is accessible. Work must be started and finished during the access schedule interval. Performing work beyond access hours is generally not possible. Access schedule is always set up in the activity time zone.

Action Link

A link that opens a screen where you perform an action when clicked or tapped. Common actions include Add Activity, View Details, Delete, and Modify. Links are configured in the *action management* screen.

Action Management

A screen in Oracle Field Service where *action links* are configured. The information on this screen determines which links will display in the interface, and in which locations they will display.

Activate Route

A link or button that starts the *resource's* workday. A resource must activate his or her *route* in order for the system to monitor delivery in real time and respond to updates.

Activity

Any time-consuming work performed by a *resource*, such as customer-related job, network maintenance, lunch break, warehouse visit, or meeting. Every activity has a type, a start time, and an end time. An *activity type* defines specific parameters of the activity, such as flow, attributes, screen color, and so on.

- A *non-scheduled activity* is an activity that is not scheduled for a specific date
- A *not-ordered activity* is an activity whose order of routing runs in the queue is not currently defined, but can be run any time during the work day. Not-ordered activities do not have any defined *ETA* or delivery window.
- An *ordered activity* is an activity whose place in the route has been defined, and is performed at a specified time of the work day. You can change ordered activities to not-ordered, and not-ordered to ordered. You also can change the order of activities in a route.

Activity Status

A stage in the *activity* flow, which can be one of the following:

- *Pending*, represented by the color yellow
- *Started*, represented by the color chartreuse green
- *Completed*, represented by the color light blue
- *Not Done*, represented by the color teal
- *Suspended* activity, represented by the color light teal
- *Cancelled*, represented by the color light green

See also *activity type*

Activity Type

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

- **Regular:** Typical activity. This is the initial label for any activity.
- **Pework:** Activity created by the Pework command. This command is applied to a regular activity and creates a clone of it with the type pework to distinguish between the two. Pework activities are created with a “started” status. See *activity status*.
- **Reopened:** Activity created by the Reopen command, and applied to some completed, not done, or canceled activity. The command clones the activity and creates a new not-ordered activity with a reopen type and *pending status* status for the same resource.

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

- **Activity:** Activity that is not associated with a customer. Usually this activity is a break, assisting another resource, or non-customer related work such as network maintenance. See .
- **Team work :** A specific type of activity where one resource assists another resource (who is a member of the same team). See *teamwork*.

Add Time

A feature that allows a resource (or another user) to add additional time to an activity when the activity extends beyond the estimated end time.

Agent

Any standalone application that interacts with the Oracle Field Service platform using the Oracle Field Service API or kernel.

Aggregator

A high-level entity on the resource tree that functions as a parent directory for other *resources*. You cannot assign activities to an aggregator.

All-Day Activity

An *activity* that can be done any time during the day without violating any obligations of the company. All-day activities do not have a service window. Note that an all-day activity (without a service window) is different from a *not-ordered activity* (without an *ETA*).

Apex

A proprietary, Java-like programming language for the Force.com platform.

Appointment

See *activity*.

Assigning

Attaching an individual *activity* or a *route* to a resource.

Assistant

In a teamwork activity, the *resource* that assists another resource. In the *resource tree*, the arrow points away from the assistant. See also *teamwork* and *team leader*.

Billing System

The system where customer details are saved, customer bills are generated, and/or activities are entered.

Booked Activities

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

Bucket

An element of the *resource tree* where a job is kept before it is manually or automatically assigned to a specific *resource*. A bucket can be used like an *organization unit* to sort and organize items, and to hold activities that you want to route to the field resources that are in the bucket.

Business Rule

A setting in Oracle Field Service that aligns a particular system function with the strategies and practices of a company.

Calendar

Displays the schedule for a resource, group, or bucket.

Cancelled

A *resource* stage in the activity workflow, indicating that an activity will not be performed. This status can be changed only by using the Reopen command.

Capacity

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

Capacity Bucket

A type of *bucket* used for Oracle Field Service Capacity Service.

Capacity Categories

A set of *work skills* and *time slots* that are bundled together to estimate the time and skills required for a particular task. This information is sent through an API to the activity system so that agents can determine whether qualified resources are available before booking an activity.

Capacity Management

The process of managing a workforce to ensure that a company has enough people with specific skills to do a certain amount of work. This is related to *quota management*, which defines the reverse relationship.

Case

A customer issue such as feedback, problem, question, and so on.

Collaboration

Oracle Field Service Collaboration Service. Allows Oracle Field Service users to:

- Communicate with the another Oracle Field Service user
- Share details about a resource, activity, or inventory item with another user
- Move an activity or inventory item
- Find the nearby resources

Chatbots

Chatbots help engage technicians in their day to day activities and allows them to work smarter and more productively. After an integration, a chatbot acts as a personal assistant or a virtual help desk that can assist a technician with their

day to day jobs, by answering questions from technicians or by notifying predefined events in Oracle Field Service Cloud.

Community

A feature that allows users to communicate and collaborate in real time with other members of a team by searching for and adding them to an address book, and by initiating a chat or call them.

Company Boundaries

The area where your company provides customer service. Company boundaries are defined under Business Rules configuration screen by specifying the coordinates of the upper left corner and the lower right corner of the boundary.

Configuration

The screen from which a company can configure Oracle Field Service settings and parameters according to its specific requirements, such as the type of work that is performed, the skills that are available for assignment, working-calendar organization, and so on. Configuration options are grouped by their purpose, which include the following:

- General
- Resources, Activities, Inventories
- Displays
- Users and Security
- Subsystems and Integrations

Completed

A stage in the *activity* workflow that indicates that a resource has successfully finished work. This is a final status and can be changed only by applying the Reopen command.

Cancelled

A stage in the activity workflow. Activities with this status will not be performed. This is a final status and can be changed only by using the **Reopen** command.

Contact

The main point of contact for an account. Depending on the company's structure, there might be several account contacts.

Contacted Customer

A customer who receives at least one message with any service or delivery window.

Context

Oracle Field Service screen layouts that can be configured for users via combinations of fields, properties, action links and, when applicable, menu items.

Customer-Facing Activity

A task that must be performed at the customer's home or business. Examples include installations, upgrades, and deliveries. See also *activity*.

Customer-Service Representative

A person who interacts with customers and sets activities.

Daily View

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

Dashboard

The dashboard contains a number of tables that provide a snapshot of the data gathered about your workforce. You can use it to determine how well you are meeting customer expectations.

Delivery Window

The time when Oracle Field Service expects the *resource* to arrive at the customer's home or business. The window includes a buffer to account for travel time and the potential for delay. This time frame is shorter than the *service window*.

Default Schedule

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. The default schedule is displayed in a darker shade on the calendar.

Dispatcher

A person who assigns an *activity* to a *resource* and monitors their progress.

Displays

A *Configuration* category in Oracle Field Service containing the settings and parameters that control the properties and layout structures displayed to the user in the interface. These settings also control how information, such as the first day of the week in calendar views, is formatted.

Duration

Time period needed or used to accomplish an *activity* or to travel between activities.

Equipment

See *inventory*.

Estimation

A term used in *capacity management*, also referred to as "capacity estimation". Estimation determines the number of human-minutes available for a particular *time slot* based on *resource calendars*.

ETA

Estimated time of arrival is the time that Oracle Field Service predicts that the *resource* will arrive at the customer's location. ETA for pending activities is calculated dynamically from *historical data*. For completed activities, the ETA is the time when the resource actually arrives at the customer's location.

Extended Duration Support

Extended duration support that allows a Segmentable activity to have a total duration longer than for regular activities and span across multiple days.

Field Manager

A person who oversees employees who travel to work in sites or in the field. Their main task is to supervise people on a site, ensuring team members are performing their responsibilities in the field and are working as effectively as possible.

Filters

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

Forecasting

A feature that allows a company to forecast workload on the basis of *historical data*.

Formula

In the context of validation rules and default values, a formula is a text expression. It describes the desired business flow and is written with the verbiage of a defined language. A formula might contain text sentences and numbers or it might refer to the application's fields and custom properties. All of these can be combined using logical, comparison, arithmetical, and additional operators and special functions.

Glossary

The configuration dictionary that maps a company's preferred name, label, and phrase defaults used in the interface.

Note: Property names are managed in the **Properties** screen.

Hint

A dialog box that displays additional information about the selected *activity* or *resource*. A hint also contains links that take you directly to an action that you might perform on that item.

Historical Data

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

Holidays

A **Notifications** configuration screen used to define the dates on which certain messages sent to customers are blocked.

Idle Time

Time period associated with the route when a *resource* is not traveling to or working on an *activity*.

Internal Activity

A task that is not performed directly for a customer, and typically does not take place at a customer's home or business. Examples include vehicle maintenance and company meetings. See also *activity*.

Inventory

A list of items showing all the equipment that is either already present or about to be installed or changed at the customer location. This list can include inventory pools, as well as serialized and non-serialized parts. Some tasks you can perform with inventory include viewing, searching for, exchanging, and uninstalling.

See also:

- *inventory pool*
- *trunk stock*
- *serialized inventory*
- *non-serialized inventory*

Inventory Pool

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

Jeopardy Situation

A situation in which Oracle Field Service predicts that *activity* will miss its promised service window. The activity in jeopardy displays in pink in the Oracle Field Service interface.

Launch Condition Name

A workflow event that invokes a *message* when a particular internal event occurs. As a result, messages are delivered to customers. For example, if you use a *post-activity survey (PAS)*, you might set the *Launch Condition Name* to launch the post-activity-survey message. In this case, when a customer-facing activity is completed, the Launch Condition Name initiates a message scenario that sends the post-activity-survey message to the customer. See also *message scenario*.

Lead

See *team leader*.

List View

A chronological list of the day's activities for the selected *resource*, *group*, or *bucket*. Activities are ordered by the estimated start time. This view is useful when you want to see both the daily schedule and the related details simultaneously. See also *time view*.

Login Policies

A configuration screen that allows you to set the authentication requirements for logging in to Oracle Field Service.

Map

An option on the mobile application that helps you locate stops on your route by providing visual details and driving directions.

Map Layers

A map feature that displays demographic information such as population density, and the locations of gas stations, pipelines, and other geographical entities.

Mass Activity

An *activity* involving two or more *resources*. Examples of mass activities include scheduled team meetings and safety meetings.

Max Available

The maximum *capacity* available on the selected day, *time slot*, or *capacity categories*.

Message

A single piece of data sent by Oracle Field Service .

Message Scenario

Comprises of set of rules that specify how to process a message notification or a transaction. A message scenario is launched by a *notification trigger*.

Min. Quota

The minimum number of minutes to be allocated to an *activity* in a selected *time slot*. The min quota is applicable only on the time-slot and capacity levels.

Multi-Day Activity

A complex task that is segmented to create several single-day activities or segments.

Navigation Button

When clicked, opens a side bar menu with all available menu items. Clicking each link in the side bar menu opens the screen associated with that link. For example, clicking **Configuration** opens the Configuration screen.

Non-Instantiated Activity

An *activity* that is not part of *quota management*, and for which no *capacity categories* associated with a *work skill* exists.

Non-Scheduled Activity

An *activity* that is not assigned to a specific date.

Non-Serialized Inventory

Inventory associated with a part that is generically defined within Oracle Field Service, so that *trunk stock* might be decremented based on required inventory associated with an *activity*. See also *serialized inventory* and *required inventory*.

Note: You can define any part as *non-serialized inventory*, including those parts that have serial numbers. For example, a cable modem with a serial number can be non-serialized inventory within Oracle Field Service so that trunk-stock inventory levels can be associated with a route and managed daily.

Non-Working Reason

A Resource Calendars setting used to indicate why a *resource* is, or will be, absent. Typical non-working reasons include illness, holiday, vacation, and bereavement.

Non-Working Time

A Resource Calendars setting used to denote time when a *resource* is not available for work.

Not Done

A status that identifies an *activity* that cannot be completed that day, and closes the activity so that the *resource* can move on to the next customer. Unlike *suspend*, which creates a duplicate copy of the activity to be completed by the technician the same day, the Not Done status is considered to be a final status. For example: the customer was not home, or the customer asked to reschedule. See also *completed status*.

Notification

A message containing activity-related information sent by Oracle Field Service to a customer, a *resource*, a *dispatcher*, or by another system. A notification can be sent via a telephone call, an email, or an SMS.

Not-Ordered Activity

An *activity* that does not have an *ETA*. A *resource*, *dispatcher*, or *route* might define the order. For example, an edit-activity command to change activity order in Core Application.

Collaboration

A separate module for Oracle Field Service that provides a real-time, context-aware collaboration tool for all Oracle Field Service users. For example, a user can locate a working resource and share details about a *resource*, an *activity*, or an *inventory* item. Also, Oracle Field Service Collaboration supports a confirm-receipt process for moving activities or inventory, which helps when resources are in remote locations and potentially offline.

Smart Location

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

OAuth2 Access Token

A token issued by a Token Service, which can be sent with an API request, to authenticate the client.

OAuth2 Token Service

A service, which can issue access tokens, which can be used when authenticating requests, such as authentication in REST API calls. Oracle Identity Cloud Service contains a Token Service that can be used to authenticate in Oracle Field Service REST API.

Opportunity

A deal or a transaction executed with an account.

Oracle Identity Cloud Service

A next-generation cloud-based security and identity management platform. It is designed to be an integral part of the enterprise security fabric. For more information, see: <https://www.oracle.com/cloud/paas/identity-cloud-service.html>.

Ordered Activity

An *activity* that has been classified as ordered, and where an estimated time of arrival has been assigned.

Organization Unit

An element on the *resource tree* representing a functional department of the customer's organization, such as network maintenance technicians or field service technicians. An organization unit is typically represented as a bucket+group in the resource tree, where child resources represent employees and activities in the bucket represent unassigned activities associated with the organization. An organization unit also aggregates field resources, vehicles, and tools in the tree-like hierarchy to simplify management and reporting.

Other Activities

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

Pending

An *activity status* used for activities that have been scheduled but not yet started. This is the initial status when an activity is created. From this status, an activity can be *Started* or *Cancelled* or *Suspended*.

Percentage to Stop Booking

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

Percent Quota

Percent of the *capacity* that is available for booking.

Permissions

A screen in Oracle Field Service used to configure the features that users can see and use. Permissions are applied to profiles, not individual users. See also *profile*.

Placeholder ID

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

Planning

Estimation of the workforce or workload required at a specific time.

Post-Activity Survey (PAS)

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

Pework

An *activity type* for work that must be completed before a subsequent *activity* can be performed. Pework activities are created with an activity status of *Started*.

Profile

A screen in Oracle Field Service used to configure groups of users. These groups are then assigned permissions that control which features they can see and use. See also *permissions*.

Properties

A screen in Oracle Field Service used to define-user interface fields, such as field length, field type, and valid values.

Provider

See *resource*.

Quota

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

Quota Management

The process of defining the amount of work (per *work skill* and *time slot*) that a company performs for a specific area, such as a *bucket*, for a specific day. A related process, *capacity management*, defines the reverse relationship.

Quota Matrix

The process of defining the amount of work (per *work skill* and *time slot*) that a company performs for a specific area, such as a *bucket*, for a specific day. A related process, *capacity management*, defines the reverse relationship..

Regular Work Zone

The region where a resource's activities are typically located.

Repeating Activity

An *activity* that recurs with a predefined frequency in a predefined period.

Required Inventory

Both *serialized inventory* and *non-serialized inventory* can be listed as required for a particular *activity*. Oracle Field Service monitors the required inventory that resources carry in their trucks against the quantities required for the day's activities, and warns them if they do not have an item needed to complete their route.

Field Resource

An element in the *resource tree* that represents a defined company asset, represented by the individual who performs an *activity*. A field resource has work skills, associated work zones, and has a related user account in the application. A field resource is assigned an activity based on their skills, certifications, geographical locations, and their availability to guarantee arrival at the customer site within the promised window. Example for a field resource is technician.

Resource Calendar/Resource Calendars

A view that displays the details of an individual *resources* schedule. This view is useful for making changes that involve multiple days or multiple resources.

See also *calendar* and *daily view*.

Resource Tree

A hierarchical view of the organization's *resources*, typically sorted by geographical region. It is displayed on the left side of the screen in Core Application.

Resource Types

A set of characteristics that you apply to a *resource*. Default resource types are *group*, *bucket*, and *resource*.

Route

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

Route by Inventory

A concept within Oracle Field Service that limits routing options based on each *resource's trunk stock* and the activities associated with *non-serialized inventory*.

Routing

The act of assigning an *activity* to a *resource*. Oracle Field Service routes activities to resources using a sophisticated algorithm that considers a number of factors including calendars, *work zones*, and *work skills*.

Routing Plan

Provides the rules that Oracle Field Service uses to route an *activity* to a *resource*. Routing plans work in conjunction with other Oracle Field Service components to incorporate business goals and strategies into the routing process.

Routing Profile

Container that holds routing plans. Routing profiles are assigned to *buckets*. You can use routing profiles to assign multiple routing plans simultaneously.

Segmentable Activity

Activity type with enabled segmenting and extended duration support.

Scheduled Activity

An *activity* that is assigned to a specific day and *time slot*.

Scheduled, Not-ordered Activity

An *activity* that is assigned to a specific day, but not assigned to any specific *time slot*.

Serialized Inventory

Inventory parts that are unique and cannot be decremented based on a route's activities. See also *non-serialized inventory* and *required inventory*.

Service-Level Agreement (SLA)

The time window promised to a customer within which an *activity* must be completed.

Service Window

The time window promised to the customer within which an *activity* must be started. Service-window time is longer than the *delivery window*.

Shift

A pattern of *working time*. You can create separate shifts for each of the different working-time patterns within your organization.

Started

A status indicating that a *resource* has arrived at the *activity* site. Only one activity can be started in a resource's route at a given time. Once started, an activity's status can change to *suspend*, *completed status*, or *Not Done*.

Statistical Parameters

A screen used to configure settings for collecting and analyzing statistics. Oracle Field Service uses statistical data on actual *activity* and travel duration to calculate estimated time of arrival and delivery window. In addition, *routing* uses the statistics to effectively assign activities to resources.

Status

A term whose definition is dependent upon the Oracle Field Service module being used.

- In Oracle Field Service Capacity Service, status refers to a specific work zone and whether it is open or closed.

- In Core Application, the terms *activity status* or *status* refer to whether a routed job is *Pending*, *Started*, *Completed*, *Not Done*, *Suspended*, or *Cancelled*. See also *activity status*.

Suspended

A status indicating that an *activity* has been postponed because the work could not be completed within the given timeframe, and allows the activity to be completed at a later time during the day. For activities that cannot be completed in the same day, use *Not Done*. When you click **Suspend** for an activity with the Started status, the activity is cloned. While the original activity is added to the *not-ordered activity* queue with a *Pending* status, the cloned activity gets a new activity ID with the status Suspended. If you click **Suspend** for an activity with the Pending status, it is converted to a not-ordered activity with the Pending status.

Team Leader

In a teamwork activity, a resource who is being assisted by another team member. In the *resource tree*, the arrow points to the team leader. See also *assistant*.

Teamwork

An *activity* that is performed by two *resources*: a *team leader* and an *assistant*.

Technician

A *resource* who performs technical services on behalf of a company.

Time Slot

An interval that defines when an *activity* has to be started, typically agreed upon by the customer and the client.

Time to Complete

The time it takes to complete an *activity*, calculated as:

- in **Cancel activity** and **Activity details**, *multi-day activity* is the duration of the finished segments
- in “Complete activity” and “Close as Not Done”, multi-day activity is the result of subtracting the start time from the current time
- in **Reopen**, multi-day activity is the minimal duration of a single segment based on *activity type* settings

Time View

A view similar to a Gantt table that displays the activities for the selected *resource*, *group*, or *bucket* in timelines, with the activities shown as blocks of time. The time view consists of an upper and lower panel, each with its own *resource tree* and controls for identifying and zooming in on particular resources. See also *list view*.

Tool

An element on the *resource tree* representing a resource that can have work skills, inventory, and geolocation tracking enabled. When assigned to a team it may add needed work skills and inventory to be used by the team. A tool can participate in a team, but cannot hold a team. A tool does not have an associated user and is not used in *Quota Management*. Examples of a tool are 30-foot ladder, excavator.

Travel Area

Defines the maximum allowed travel territory for a company and can contain groupings of *work zones*. Typically, companies have at least one high-level travel area listed.

Truck

A default *resource type*.

Trunk Stock

Inventory carried in a vehicle. See also *inventory pool*.

Unscheduled Activity

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

Used

A *capacity* and *quota management* term that represents the duration of all activities booked for the selected day, *time slot*, or *capacity categories*.

Used Quota Percentage

The percentage of the *quota* used by *booked activities*.

User

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

User Type

A user profile that defines what a user can do and see within the application. User types govern a user's security and display permissions, ability to use certain functions, and access to menu items and properties. User types may also include custom screen context layouts.

Vehicle

An element on the *resource tree* representing a resource that can have work skills, inventory, and geolocation tracking enabled. When assigned to a team it may add needed work skills and inventory to be used by the team. A vehicle can participate in a team, but cannot hold a team. A vehicle does not have an associated user and is not used in *quota management*.

Visit

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

Web Services Description Language (WSDL)

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

Work Area

The work area displays the details about the resource selected in the *resource tree*. The information changes, depending on the tab selected in the menu.

Working Time

The period of time that a resource spends performing activities and tasks.

Work Schedule

A template composed of *shifts* and *non-working times*. When grouped as a work schedule, these shifts and non-working times are applied all at once to a *bucket* or to an individual *resource*.

Work-Skill Conditions

The data that Oracle Field Service uses to assign *work skills* to an *activity*.

Work-Skill Level

An activity that a *resource* is qualified to perform (resource property), or the qualification required to perform an activity (activity property).

Work Skill

A skill or competency that a resource has in order to perform an *activity*. It also can be a qualification or activity property that is required to perform an activity. Companies may have different access levels that affect work skills.

Work Zone

The defined geographical area in which a resource performs an *activity*.

Work-Zone Dictionary

In Core Application, the information displayed on the **Work Zones** screen that lists all defined *work zones* and their associated keys. From this screen, you can add new work zones and modify existing ones.