Field Service

Using Collaboration Service

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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 Introduction to Collaboration

Overview of Collaboration

Collaboration is a workforce management application. Use the Collaboration Messaging Framework to establish business-to-business message exchanging capabilities.

Collaboration enables communication between the application users and organize helpdesk activities. You can use the Collaboration window to instantly access other data from the application, instead of using the Core Application interface. For example, you can share details about a resource, an activity, or an inventory item, or you can move activities and inventory. You can also view the notifications 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.

Using collaboration you can perform the following high-level tasks on a day-to-day basis:

- Communicate with other users

- Share the details of a resource, an activity, or an inventory item with another user

- Move activities or inventory items

- Find the nearby resources

- Initiate video calls

- Automate helpdesk activities by integrating with Oracle Digital Assistant

- Manage the customer information and business relationships

Before You Start with Collaboration

A privilege is a discrete right that is granted to view and perform a collaboration operation that would otherwise be prohibited by the Oracle Field Service.

Collaboration setup involves defining configuration privileges to manage user information and activities. Access to the functionality and data is secured using the role-based access control. In a role-based access control model, users are assigned with roles or user types, and each user type is assigned with the access privileges to perform the operations.

Contact your system administrator to get one-to-one privileges to:

- Start a conversation with a user from the resource or activity hint

- Reassign activities

- Transfer inventory to a resource

- Broadcast activities and group messages

- Initiate video calls

- Initiate feedback for video calls

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Reassignment/Transfer privileges: An activity can be reassigned only if a user has the privileges to transfer. You cannot reassign the activities unless you have permission to move the activities in the list view of the **Activities** page. You also need the **Allow Activity Move Between Resources** permission to broadcast the activities.

> **Note:** Admin or field manager must enable **Track geo location** for a resource type to use Oracle Field Service Location.

Related Topics
- Enable Collaboration Permissions

2 Configure Collaboration

Overview of Collaboration Setup

First time users needs to complete the tasks in the following list, and familiarize yourself with different user interfaces and basic navigation. The structure of this guide speeds up your implementation by providing a direct link to each core setup task.

Use the following procedure to access the setup tasks, subject to your privileges:

- **Rules to setup:** Check the rules to setup collaboration. See *Visibility Configuration for Collaboration* for details.
- **Configure groups and helpdesks:** You need to create user groups and helpdesk groups, based on your business requirement and privilege levels. See *Configure User Groups and Helpdesks* for details.
- **Add users to the groups:** You can assign users to a user group or helpdesk. See *Assign Users to the Collaboration Group* for details.
- **Enable permissions:** You need enable collaboration access permission to the user type. See *Enable Collaboration Permissions* for details.

Related Topics
- Set Up Collaboration Tutorial

Visibility Configuration for Collaboration

Setup visibility permissions in the system to access Collaboration. These settings allow the authorized administrators and helpdesk to allocate users to various groups and control permissions for them.

Visibility configuration —The three key entities associated with Collaboration visibility configuration are:

- **User:** Same as the user defined in the system.
- **User Group:** Group of users with similar collaboration visibility.
- **Helpdesk:** Collection of users or user groups who are helpdesk operators.

Rules to setup Collaboration:

- Visibility can be defined between a source entity and a target entity. The source can be a User group and target can be either a User Group or a Helpdesk; this is a symmetrical relationship.
- A user is automatically marked 'Admin' when the **Collaboration** and the visibility **Permissions** menu is enabled for that user type. All the admin users can configure permissions for the resources.
- Admin can configure only the users under the resource tree entries they have access to.
- By default, a newly added user from a different group cannot collaborate with anyone.
- When you add new user to the system, setup a user group for that user to enable collaboration.
- User can collaborate only with the users within the same group/bucket and with the users of other user groups whose visibility setting is configured.

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- Users added to a Helpdesk can see each other by default. They can also perform Helpdesk related operations like transfer, chat etc.

Related Topics
- Set Up Collaboration Tutorial

Configure User Groups and Helpdesks

As a user, you can create user groups and helpdesk groups from any resources available to you, subject to your visibility settings. You can select both individual and group resources to your group and apply one of the predefined filters, if needed.

Configure the user groups and helpdesk users in the Collaboration screen. Based on your permissions, you can create, edit and delete a group. You can also map the users against each helpdesk and user group. Only the selected helpdesk and user groups will have visibility to the group created.

1. Click **Configurations** > **Subsystems And Integrations** > **Collaboration**.

   The **Collaboration** page opens.
2. Click add icon to create a user group/helpdesk.

   The **New Group** page opens.
3. Configure the following values:

Option	Description
Name	Enter the name of the group
Type	Select the type of the collaboration group: ○ Group: Denotes the user group ○ Helpdesk: Denotes a group of service and support providers to the users
Active	Denotes if the group is active. Unselect the **Active** check box to make a group inactive.
Groups to collaborate with	Add other groups to have visibility to this group.
Assisting Helpdesks	Add other helpdesk groups to have visibility to this group.

4. Click **Save**.

   The group is created.
5. To add users to the group, click **Resources** on the hamburger menu.

   The list of available users appears. You can add single user or multiple users at a time, using the group action links.

   >

Related Topics
- Assign Users to the Collaboration Group
- Set Up Collaboration Tutorial

Assign Users to the Collaboration Group

Add one or more users to multiple helpdesks and collaboration groups. You can also delete selected users from a group.

You can only add a single user at a time in case you are creating a new user. In case of existing users, you can add multiple users to multiple groups simultaneously.

1. Click **Resources** on the hamburger menu.
2. To add existing users:
    a. Use the Resource Type or User Type filters and filter the required resources.
    b. Select the check box against the desired resources.

    The number of resources you have selected is displayed in brackets for each group action.
    c. Click **Set Collaboration Group**.

    If you don't see the **Set Collaboration Group** option, add it to the **Group actions** section on the **Resources** Context layout structure for the selected user type.
    d. On the **Set Collaboration Group** dialog box, click the **Collaboration Group** field and select the required Collaboration groups.
    e. On the **Set Collaboration Group** dialog box, click the **Operator Helpdesk** field and select the HelpDesk for which you want to make the selected users as operators.
    f. Click **Apply**.

    The number of resources for which the Collaboration group is being added or that are made as Helpdesk operators is displayed in brackets on the **Apply** button.
3. To add a new user:
    a. On the **Add Resource** page, click the **Collaboration Group** field and select the required Collaboration groups.

    If you don't see the **Set Collaboration Group** option, add it to the **Edit Resource/user** Context layout structure for the selected user type.
    b. On the **Add Resource** page, click the **Operator of Helpdesk** field and select the required Helpdesks.
    c. Complete the remaining mandatory fields.
    d. Click **Submit**.

Enable Collaboration Permissions

Users can access Collaboration only when the collaboration permissions are configured against each user type. Configuration includes enabling permissions to transfer the activities, inventory and image sharing via chat.

Only Administrator or your filed manager can enable collaboration permissions for you.

1. Click **Configuration** > **User Types**.

    The **User Types** page opens.

2. Under the **General** tab, select the appropriate Collaboration **Permissions** against each user type:

Click	To:
Allow inventory move Via chat	Share and transfer inventory
Allow activity move Via chat	Share activities
Allow image sharing Via chat	Share images through the chat window

3. Click **Save**.

The collaboration permissions are enabled.

Related Topics
- Set Up Collaboration Tutorial

Troubleshooting Configurations

These common problems can be easily corrected with a change to your configuration settings. Check the suggested solution or contact Oracle support for more help.

Troubleshooting reasons

Problem	Reason
The **Start Conversation** link does not display in the **Hints** box.	The **Start Conversation** action must be added to the **Hint** context. You may need to define the association between the resource and the hint.
Details about the moved or shared item do not appear in the **chat** window.	Click **Expand** in the upper right corner of the message. That will give you the space you need to view the details. The fields in Manage view that contain this information could also be empty. Contact Oracle support to help you define the details in the **Resource details in chat**, **Activity details in chat**, or **Inventory details in chat** context.
The activity icon does not have a name next to it in the **chat** window.	The **identify activity context** has not yet been defined.
The inventory icon does not have a name next to it in the **chat** window.	The **Identify equipment by context:** has not yet been defined.
Cannot move inventory items	The **OFSC Location** has not yet been activated. See the Oracle Field Service Location User Guide for instructions.

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Related Topics
- Set Up Collaboration Tutorial

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3 **How the User Interface is Organized**

Collaboration Window

If you are a dispatcher, you can use Collaboration to delegate activities to a field manager, who works with the resources in the field. If you are a helpdesk operator, you can use **Collaboration** to monitor helpdesk chats. The **Collaboration** window is the main window that you use for both, chatting with resources, and using helpdesk.

You can see the user avatars next to the names of the users on all Collaboration pages. Further, you can also see their online or offline status. A green dot indicates that the resource is online and a white dot with a gray outline indicates that the user is offline. System messages, Broadcasts, Helpdesks, and Conferences display the corresponding icon next to them. Helpdesks show the online status, similar to that of users. You will always see the Chats and History tabs, with the Notifications tab, if applicable, even if you don't have active chats.

This screenshot shows the **Collaboration** window:

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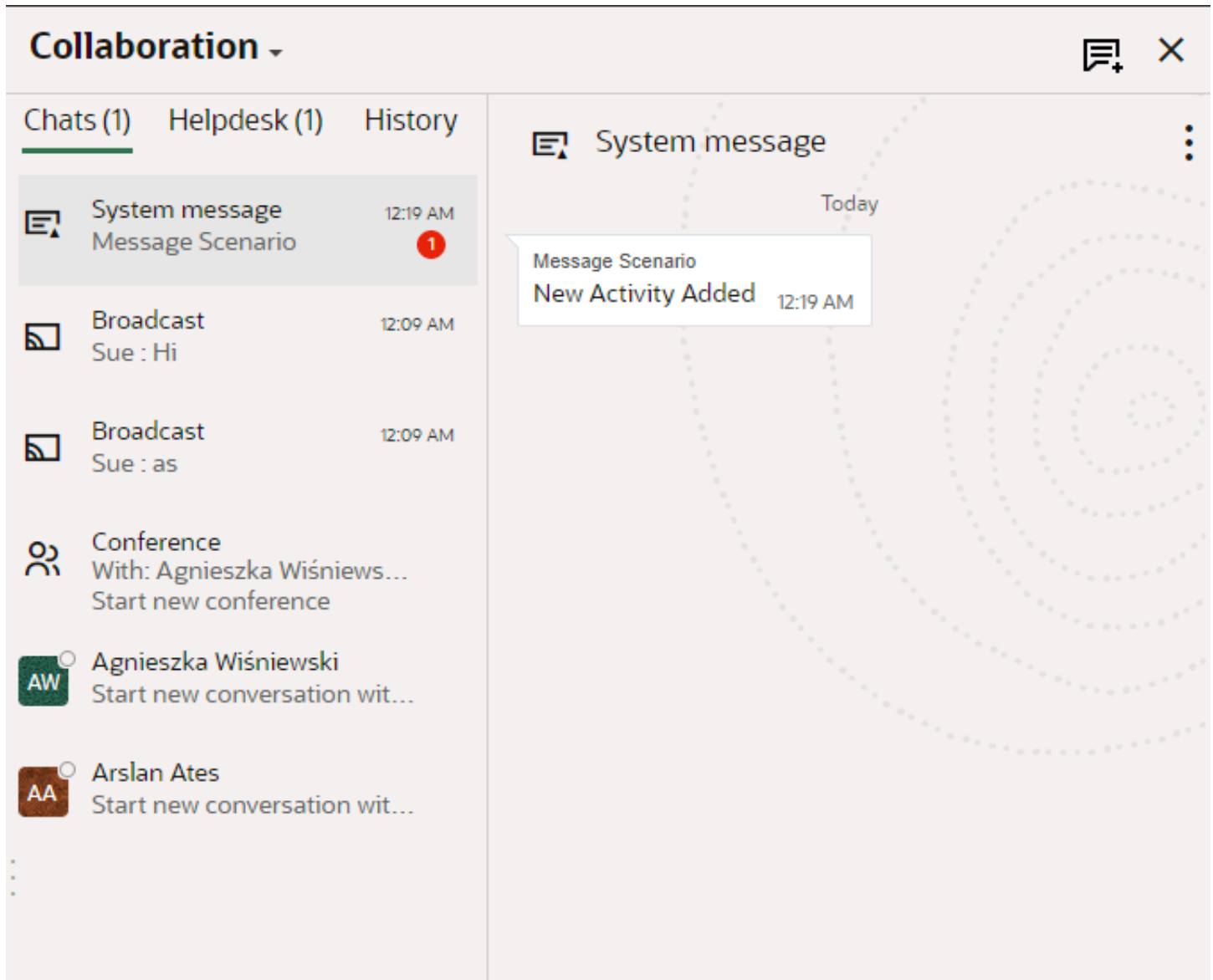
The left pane includes the Chats, Helpdesk, and History tabs and the right pane shows the details of the selected chat. The left pane also shows the avatars and online or offline status of the users. This table lists the actions you can perform on each tab:

Chats	Helpdesk	History
• Communicate about the activities and equipment. • Share images, activities, inventory, and resources. • Transfer activities and inventory.	• Route helpdesk requests to the required agents. • Transfer conversations from one agent to another.	• View the history of the chats.

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Chats	Helpdesk	History
• Locate the nearby resources. You must enable **Smart Location** to manage location and find the nearby resources. • Share your current location.		

Apart from the tabs, the Collaboration window includes these options:

- Options menu: Use this menu to perform actions such as view History, Add to Address Book, Call, Leave Conversation, Share Activity, and Reassign Activity.

- Start video: Use this option to make a video call to a resource.

- Add user: Use this option to add another resource to the current conversation.

- New conversation: Use this option to start a new one-to-one chat, send a group message, or look for a nearby resource and start a chat with them.

You can view these as well on the Collaboration window:

- A list of active chats and broadcasted messages.

- A list of helpdesks added to your Address Book.

- A list of other Collaboration users, which is the contacts you have added to your Address Book.

- Collaboration Alert Messages: If you use collaboration as a delivery channel in message scenarios, then the alerts from the message scenarios are displayed as message alerts. Such message alerts have these properties:

  - All message alerts are grouped under the *System Message* Collaboration window.

  - The user-defined content in the **Subject** and **Body** fields of the **Patterns** tab displays as a message alert in the Collaboration window. If no content is specified in the subject and body fields of the **Patterns** tab, then a blank message alert displays.

  - The message alerts are read-only and you cannot reply to the message alerts.

  - The message alerts are available in the chat history if you remove them from the Collaboration window using the **Leave Message** option.

When there are no active Collaboration or Helpdesk chats when you open the Collaboration window, you see the start new conversation option by default. If your device is offline, Collaboration does not work in your mobile interface.

Related Topics
- Use Collaboration Tutorial

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.

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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:
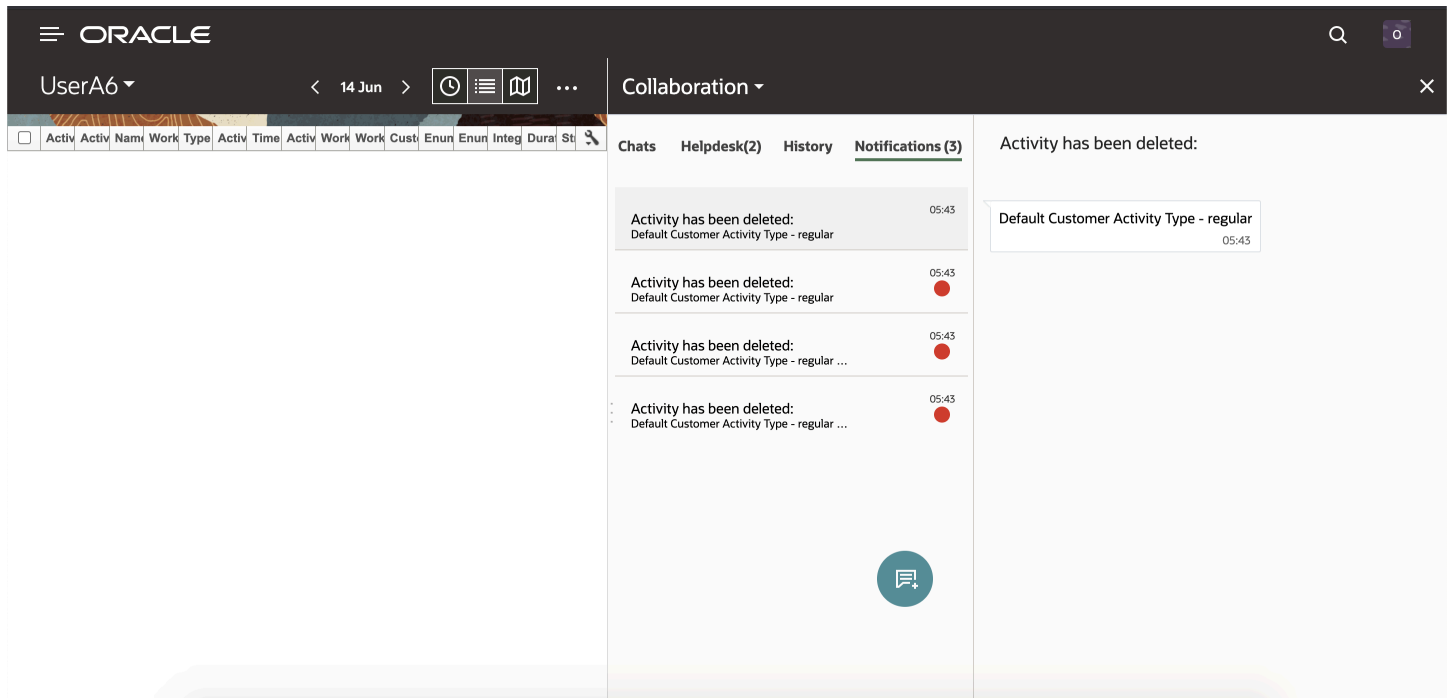
This screenshot shows the Collaboration window with the Notifications tab in the installed app:

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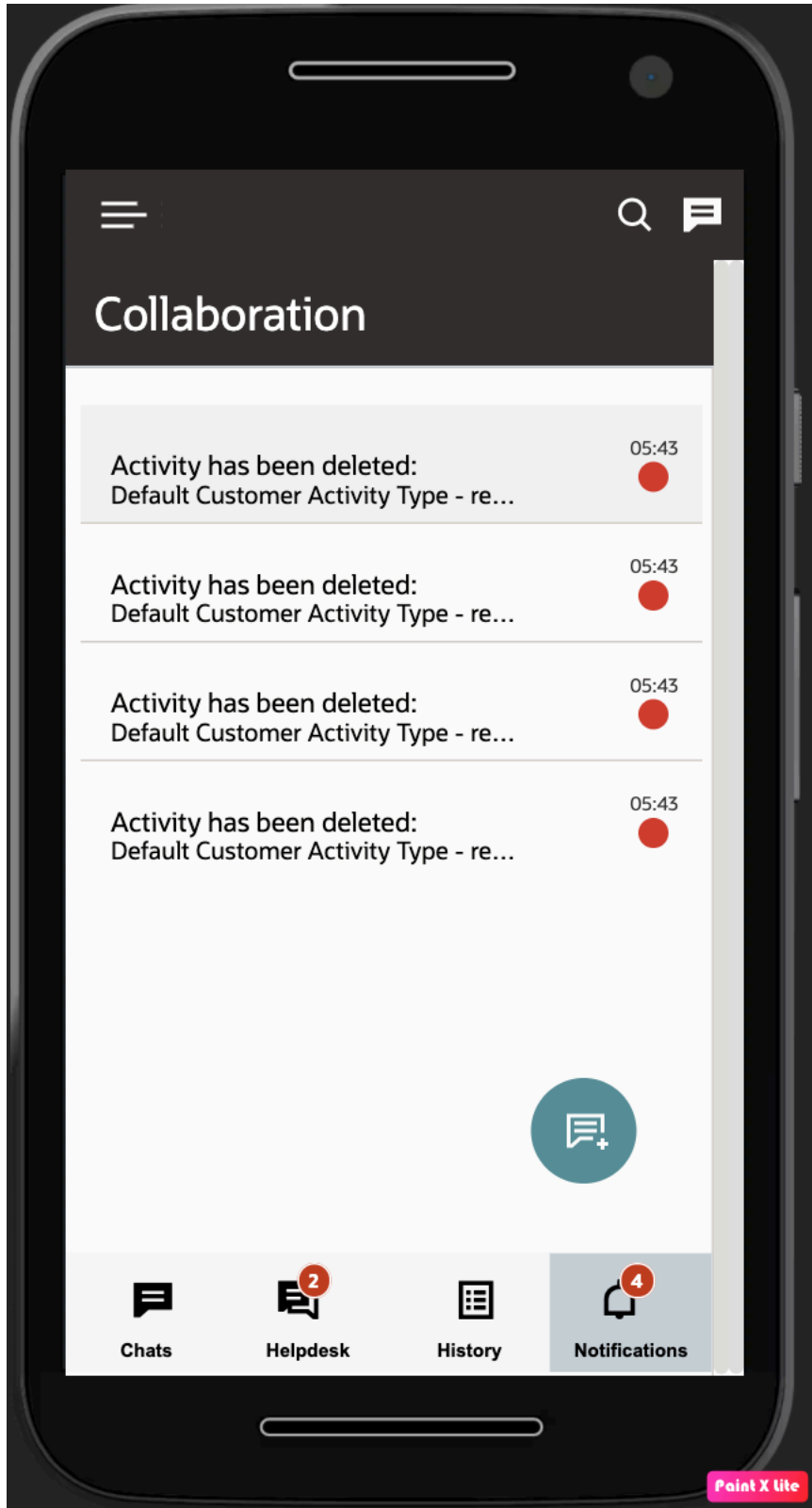
These are the features of notifications:

- 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.

Collaboration Chat List Window

Using collaboration, you can send and receive real-time messages. All these active one-to-one, conference chats and the helpdesks requests appear in the **Collaboration** window. Unread chat messages are displayed with a colored dot in the left pane of the **Notifications** tab.

All the conversations are displayed in the order they are received. The chat list displays:

- The details of the conference.

- The broadcasted message you initiated or received.

- The name of the participant with whom you are chatting.

- The name of the helpdesk you have sent your request to.

- The last message of the conversation.

- A left-pointed arrow next to the chat thread, if you have sent a message.

- An empty grey colored message-number box, if you have sent the last message in the conversation.

- The red colored unacknowledged message-number box, if another user/helpdesk operator sent the last message in the conversation.

- The time in black color, if the message is unacknowledged and is within the threshold time.

- The time in red color, if the message is unacknowledged and crosses the threshold time.

  This screenshot shows the Chats tab:

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Related Topics
- Use Collaboration Tutorial

Address Book

Address book contains a list of contacts and helpdesks. You can find the contacts that you have added to your address book when you search for a contact.

Helpdesk: The helpdesk is displayed in the alphabetical order and is represented with:

- Helpdesk is online

  : When a user selects the Helpdesk for a Helpdesk chat and if at least one of the helpdesk operators is online, the Chat Status icon displays as online. The helpdesk chat always shows online in the Contact or Search list.

- Helpdesk is Away

  : When all the helpdesk operators in a helpdesk are offline, the helpdesk displays a yellow dot with the status Offline. When all the operators are turned off in a helpdesk, the helpdesk displays a yellow dot with the status Away.

You can click the helpdesk name in the list to chat with the selected helpdesk.

Other Users: A list of users are displayed below helpdesk. These users are arranged in the alphabetical order and their status is represented with:

- User is online

  : Displays in address book, search contact list & Whose Nearby list when a user is online and is in contact list/ address book.

- User is offline

  : Displays in address book, search contact list & Whose Nearby list when a user is offline and is in contact list/address book.

Click or tap a user's name in the list to start a conversation.

Related Topics
- Use Collaboration Tutorial

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Add Contacts to or Remove Contacts from Address Book

You can add contacts to your Address Book for quick access. The contacts in your Address Book are displayed below the Search Contact field.

1. Open the **Collaboration** window and click the new conversation icon.
2. Click **Start Chat**.
3. Search for a resource.
4. Click the resource name.
5. Open the options menu and then click **Add to Address Book**.
6. To remove a contact from the Address Book, click the contact. Open the options menu and then click **Remove from Address Book**.

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4 Manage Contacts

How You Locate and Manage Contacts

Locate and manage the contacts in your address book.

You can locate a contact using one of these ways:

- Address book in the **Collaboration** window: Find a user that is added to your address book.
- **Search**: Find users or helpdesks whose name or description contains a specific set of symbols.
- **Who's Nearby**: Find the users whose latest uploaded location is close to your current physical location.
- **Search Contact**: Find a user that belongs to any other Collaboration group.

Related Topics
- Use Collaboration Tutorial

Search for a Contact

You can search for a user by their name.

If you are an operator of a helpdesk, your helpdesk is not visible in the **Collaboration** window.

1.
   From the **Collaboration** window click the new conversation icon ⊞₊ .
2. Enter the user's name or part of the user's name in the **Search Contact** field and press enter.
   You must type at least 2 characters. This field is case insensitive. The list of helpdesks and users whose name or description matches with the search key appears when you press enter.
3. Click the contact's name from the list to start the chat.

   Tip: You can add this user to your address book so that you don't have to search next time.

Related Topics
- Use Collaboration Tutorial

Locate Nearby Resources

You can locate the nearby resources based on your physical location, so that you can chat with them or share inventory and activities.

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1.

Open the **Collaboration** window and click the new conversation icon 📝 .

2. Click **Who's Nearby**.

The **Nearby** window opens with:

- o A list of users whose latest geo location uploaded to the application is close to yours is displayed under **Based On Your Physical Location** sub-header.
- o The users are arranged according to their distance from your location. Distance is displayed on the right side of the contact name. Users who are within 1000 KM (or Miles, as defined for **Distance measurement units** on the **Business Rules** page) range from your current location are considered.
- o Initially, ten closest users are displayed. You can click **show more** to view more users. Be aware that you can see only those users to whom the you have the permission to chat. This screenshot shows the Nearby section:
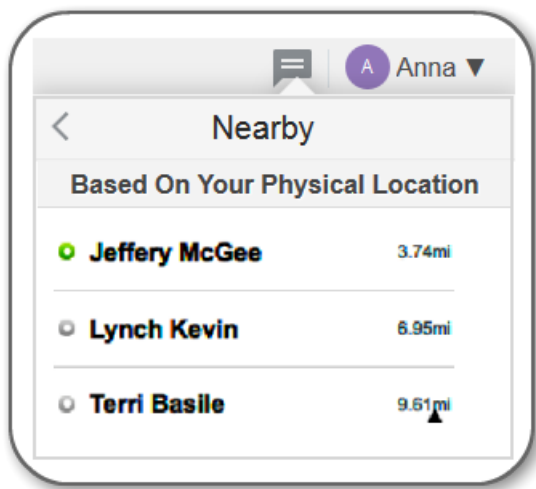
3. Click the appropriate user's name from the list to start the chat.

Related Topics

- Use Collaboration Tutorial

View User Details and Available Options

You can use the options menu to add or remove a contact or helpdesk from your address book and to view the history.

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1.

From the **Collaboration** window, click the options menu [⋮] .

You can perform these tasks from the options menu:

Click	To:
Call the User	Call the user. This option is displayed only for the users that have their phone number added on the Resource Info page.
History	View all the previous chats with this user.
Add to Address Book	Add the user to your address book.
Remove From Address Book	Remove the user from your address book.
Leave Conversation	Leave the current conversation.

2. Click **Add to Address Book** to add users to your address book so that you don't have to search their names every time to start a chat.

3. Click **Remove From Address Book** to remove users from the address book.

> **Note:** The status of the circle icon next to the user name changes when you add a user to the address book or remove the user from the address book. For more details, see *Address Book*.

Related Topics
- Use Collaboration Tutorial

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5 Configure Chat Settings

Chat Notifications

You can get notifications about the new message arrivals, group conversations and conference chat invitations, based on your notification settings. Unread chat messages are displayed with a colored dot in the left pane of the **Notifications** tab.

Notifications provide you information about a new message arrival. You can set up the chat notifications such as sound, vibration, and pop-up notifications from the **Edit Resource/User** Visual Form Editor:

- **Sound:** There are four sound options available— Off, Quiet, Loud, Persistent (repeating sound notifications of an incoming message.) The persistent notification option works only in the Mobility application. By default, the sound notification is set to **Quiet**. The notification sounds when:
    - A user is invited to a conversation or conference
    - A new message is received in an inactive conversation window
    - An activity is reassigned or the inventory transfer is requested
    - The transferred inventory is failed/cancelled/rejected
    - The Helpdesk receives a new request

- **Vibration:** Setup vibration mode for the devices that support vibration alerts.
- **Pop-up Notifications:** Select this option if you want to receive notifications as messages.

Chat Session Management

Confining indicates the browser and monitor setup options in Collaboration. These options let you manage the incoming message notifications.

To support various business needs, you open several windows and interact with multiple resources simultaneously. The number of windows opened can be one per monitor or many windows in a monitor. A message notification received in such scenarios can adversely affect the overall user experience and distract your attention. To counter this, you can configure some settings to manage the appearance of the incoming chat sessions at a window level. With these settings, you can continue the session from any open window.

You can configure these settings:

- Control incoming chat notification at a window level based on your user preferences.
- Implement the settings immediately without a browser refresh.
- Initiate and continue conversations from any monitor.
- Configure the status of notification (turned on or off) for a session through a change in or color or icon.

These settings help you view cleaner pages in the current active session. Once you turn off the message notifications:

- Incoming chats will not be notified for you. Collaboration icon is still updated with the unread chats.

- You can read and initiate chat from the **Collaboration** window.

- There is no restriction to initiate and continue conversation from this window.

- When the notifications are turned off, the Collaboration icon is displayed with a different visual representation:

Related Topics
- Turn off the Message Notifications in Manage

Turn off the Message Pop-ups in Manage

You can control the incoming chat notifications at a window-level based on your user preferences. This feature is available only in the Manage application.

When you use multiple monitors, your user experience is enhanced when you turn-on and turn-off the incoming chat notifications. You can control the incoming chat notifications confined to specific monitors. Message notifications are displayed with different icons:

-

  Collaboration is connected with incoming chat pop-up.

-

  Collaboration is connected without incoming Chat pop-up.

-

  Collaboration is disconnected.

1. From the **Collaboration** window, click the options menu.
2. Click **Turn-off message popup**.

   The Collaboration icon turns grey and the notifications are blocked. You can still see the number of chat messages received and can chat with the sender or another user.
3. Click the menu icon and then tap **Turn-on message popup** to turn-on the chat notifications back.

Manage Availability Status for Helpdesks

If you are a helpdesk operator, use the **Turn off Helpdesk** option in the **Helpdesk** tab to change your status to indicate whether you are available or away.

After you select the **Turn off Helpdesk** option from the helpdesk, the following changes occur:

- The status of the operator in the address book is updated and displayed with a Yellow circle.

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- Operators are no longer available for message transfers in the **Transfer Conversation** window.
- Operators with the *Away* status can receive messages and can respond to the incoming messages, but they cannot participate in group conversations.
- Operators with the *Away* status do not receive any message notifications.

Note: If all the operators in a helpdesk are away and if a resource tries to contact the helpdesk, an *Away* status is shown to indicate that there are no operators available. However, if a resource sends a message to the helpdesk, it can result in a delayed response.

To enable or disable a helpdesk:

1. Log in to Oracle Field Service Core Application as a helpdesk operator.
2. Open the **Collaboration** window and click the **Helpdesk** tab.
3. Select the helpdesk from which you want to change the availability status.
4. Click the options menu and select **Turn Off Helpdesk**.

   You are not available for the selected helpdesk.

   Note: To change the availability status, select **Turn On Helpdesk**.

For example, consider this scenario:

- Anna belongs to two helpdesks, Upgrade helpdesk and Install helpdesk. Anna only wants to focus only on Install issues, So, she selects the **Turn off Helpdesk** option for Upgrade helpdesk.
- Chris belongs to Upgrade helpdesk and Install helpdesk.
- Glenn, a technician, wants help regarding an urgent upgrade issue.

Glenn initiates a chat with Upgrade helpdesk. Since it is an urgent issue; Chris wants help from Anna, because Anna has more experience in resolving Upgrade issues. Chris uses the **Transfer Conversation** option to transfer the chat to Anna. However, as Anna is not available in the Upgrade helpdesk, Chris cannot view Anna in the **Transfer Conversation** dialog box, so Chris must attempt to resolve the issue or locate another available operator.

6 Manage Chats and Conferences

Start a Chat Conversation

Using the Collaboration chat feature, you can communicate and collaborate with other members of your team in real time, send an inquiry to a helpdesk, and find a user or helpdesk.

When the Collaboration feature is enabled, you can also start a chat from several locations throughout the Web interface, including the **Hints** box. Look for the links labeled **Start Chat**.

1.

From the **Collaboration** window, click the new conversation icon   .
2. Click **Search Contact** to search for a user.

You can tap or click a user's name from your address book to start a chat instantly.

A list of users that match your search criteria appear.
3. Click the user's name from the search list.

The chat window opens. If you are the receiver, you will receive a chat notification. Some points about the messages:
   - You can add new line messages in Collaboration using **Shift** and **Enter**. In mobile devices, you can use the **Enter** key. The messages are left aligned in the chat window.
   - You can click URL links in the chat window, only if the protocol with proper formatting (for example, http or https) is entered with the link.
   - The Collaboration message box expands automatically with a scroll option for large amount of text. However, you can only enter 1000 characters in the Collaboration message box.
4. If you receive more than one message, click the scrollbar lock icon to lock the chat.

The chat window doesn't scroll down automatically when new messages arrive. The chat window includes these features:
   - Unread chats are indicated with an orange circle with the count of unread messages.
   - The time of the last message received is displayed above the counter.
   - One day old chats are displayed with "Yesterday" instead of showing the time of the last message received.
   - Chats older than a day are displayed with the date. The operator can view the total duration of the chat in the Helpdesk Chat window.
   - You cannot see your name when you send or respond to chat messages.
   - The Collaboration icon displays the count of new messages, only for the new messages in chats. However, when you click the Collaboration icon, the count disappears. When you log in or refresh the browser, the unread counter displays the total number of new chat messages.
   - If you initiate a chat with a helpdesk group, the conversation is considered active until you leave the conversation. Any new messages you send to the same helpdesk is treated in the context of the same conversation, and that it appears as a new message on the same chat. If you want to initiate a new chat with a helpdesk user, you must leave the current conversation and initiate a new conversation.
5. Click the send icon.

The message is sent to the recipients. However, if you type a message and don't send it, it is saved as a draft. A draft message is shown with a pencil icon and is available in the **Chats** tab.

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Start a Video Call

The Field Collaboration Enterprise users can start a video call through the Collaboration window to collaborate with other technicians, supervisors, or helpdesk operators.

Note: The Video Call feature requires a subscription to Oracle Field Service Enterprise.

Ensure that these prerequisites are met:

- Your organization has opted for Field collaboration with Video Call service in Oracle Field Service.
- Your administrator has enabled the **Allow video call** option for your user type on the **Configuration** > **User Types** page.
- Your browser supports webrtc.
- Your browser has the permission to access your camera and microphone.

  Note: Video call is not available for iOS and Android Native apps.

- Supported Browsers:

Browser Vendor	Minimum Version	Audio/Video Availability
Microsoft Internet Explorer		Not supported
Microsoft Edge	Edge 42+	Not supported
Safari	Safari 12	Not supported
iOS	IOS 12	Not supported
Opera		Not supported
Mozilla Firefox	Firefox 66+	Supported
Google Chrome	Chrome 75+	Supported
Android	Android 9	Not Supported

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The following things can ensure good video quality:

- You must close all applications that use the internet (especially those playing music or video).
- You must use a 4G network provider.
- You must not have any ongoing file transfers.
- You should ensure that the network bandwidth is greater than 2000 Kbps.
- You might experience low quality video call if you use VPN to connect to the office network.

1. Log in to Oracle Field Service Core Application.
2. Open the **Collaboration** window.
3. Click the new conversation icon and then click **Start Chat**.
4. Search for the user with whom you want to have the video call.
5.
   Click the video call icon .

   The video call icon is available only if the receiver is online. The user with whom the video call has been initiated has an option to accept or reject the video call request using the Accept and Reject buttons. If the video call request is rejected, then both the users are notified.

   > **Note:** If the receiver does not accept or reject the video call within 30 seconds of call initiation then the video call is timed out. Also, the call initiator can cancel the call before the receiver accepts the video call.

6. Click Accept to start the video call.

   The following icons are displayed during the video call:

   - : Used to finish a video call.
   - : Used to mute or unmute the call.
   - : Used to enable or disable video streaming.
   - : Used to toggle to full screen.
   - : Indicates the user is offline.

   These video call notifications are displayed in the Collaboration window:

   - Video Call Initiation: A notification is triggered when a user initiates a video call with details of the user who initiated the call along with the receiver user information. The Collaboration service also logs the time of video call initiation.
   - Video Call Cancelled: When the sender cancels a call, a notification is available in the collaboration window with details of the user information with whom the call is initiated. The Collaboration service also logs the time of video call cancellation request.
   - No response from receiver: Video call is timed out in case no response is received from the receiver of the video call. A notification message is triggered with the receiver user information and time.
   - Video call finished: A notification is triggered when a user finishes a video call with the duration of the call.
   - Video call rejection: A notification is triggered when a user rejects a video call with information about the user who rejected the video call.

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Provide Feedback for the Video Call Service

You can rate the quality of the service and provide feedback on the service at the end of a video call.

Feedback provides insight into real life problems that the user encounters while using the service. The administrator can enable or disable the Feedback option using the **Enable Video Call Feedback** check box in the **Configuration, User Types** screen for a user type.

1.

   Click to finish the video call.
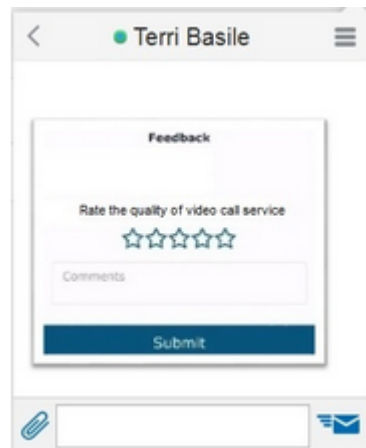
   The Feedback window displays.
2. Select one of the following options:
   - ○ 1 Star: Indicates worst quality of service.
   - ○ 2 Star: Indicates bad quality of service.
   - ○ 3 Star: Indicates good quality of service.
   - ○ 4 Star: Indicates very good quality of service.
   - ○ 5 Star: Indicates excellent quality of service.
3. Enter comments (if any) in the Comments section.
4. Click **Submit**.

   Note: There is a one-minute time out period for every feedback window and the feedback is saved only when the user submits a rating. Feedback is not a mandatory option for the user. Also, if a user initiates a video call service without providing feedback, then the Feedback window is closed automatically. Currently, 60% of video calls are prompted for feedback.

Call a User

Communicate with the resources in your address book through phone calls. Only the users within the same group can communicate with each other. The Call option is not available if the phone number is not configured for the user and the user is available only in the Mobility interface.

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The phone number of a resource is configured on the **Resource Info** page.

1.
   Open the **Collaboration** window and click the new conversation icon ⬛ .
2. Search for a user and select it, or select a user from your Address Book.
3.
   Click the options menu ⬛ and then click **Call**.

   A confirmation message appears asking whether you want to proceed.
4. Click **Yes** to make the call.

   If you are a mobile user, the call is placed directly without any confirmation.

Start a Conference

In Collaboration, you can start a conference using two ways. You can use the **Start Conference** option to invite other users for a chat. Or, you can use the Group Message option to chat with a user group.

1.
   From the **Collaboration** window, click the new conversation icon ⬛ .
2. Search for or select the user with whom you want to start a conference chat
3. Click the invite user icon and select another user into this chat window.
4. Repeat steps 2 and 3 to add additional users to the conference.

   All the messages in the thread are available to all the users in the conference, irrespective of when they join or leave the conference.
5. Click **Show** to view all the users in the conference.

Related Topics
   • Start a Group Conference

End a Chat or Conference

When a chat or conference is completed, you can end the conversation and save the thread in your **History**.

If you leave a conversation, you are not notified about the new messages in the conversation, but you can still view the conversation in the **History** tab. If you don't end the conversation, the thread is still active in the main window.

> **Note:** A conference does not end until the last user leaves the conversation. The conversation might continue after you leave. You can access the thread in History to view the complete conversation.

1. Navigate to an active chat or conference.
2.
   From the Collaboration window, click the options menu ⬛ .

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3. Click **Leave Conversation**.

   The sender is notified with the {User name} has left the conversation message. If you want to keep chatting with a user who has left the conversation, type another message into the existing chat window. The addressee is re-invited to the chat.

Retrieve a Closed Chat or Conference Thread

When a conversation ends, Oracle Field Service Collaboration saves the chat or conference in the **History** tab.

1. From the **Collaboration** window, click the **History** tab.
2. Search for a keyword or the name of a user who participated in the conversation.
3. Select the appropriate thread from the list.

   The thread displays in the **Collaboration** window.

   > **Note:** If you are offline, you cannot access Collaboration,as it is disabled. You can still access **History** to view your chat history in the Read-Only mode.

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7 Group Messaging Options

Overview of Group Messaging

Group messaging lets you to collaborate with multiple users simultaneously.

To support various business events such as 'area outage in a location', there can be a necessity to share a common message with a group of users. In such scenarios, you can identify a group of resources based on different business attributes and broadcast your messages to this group. The **Group Messaging** feature lets you to:

- Broadcast a message
- Broadcast an activity
- Start a conference chat with a group

This image shows the Group Message option:

Collaboration ▾   ✕

⟨ **New Conversation**   **Group Message**

📝 **Start Chat**
   Start a new conversation with a
   contact.

👥 **User Group**
   Message to Collaboration,
   Helpdesk and Supervisor groups

📶 **Group Message**
   Messaging with multiple users.

📍 **Location**
   Message within a location

📍 **Who's Nearby**
   Start a new conversation with nearby
   users.

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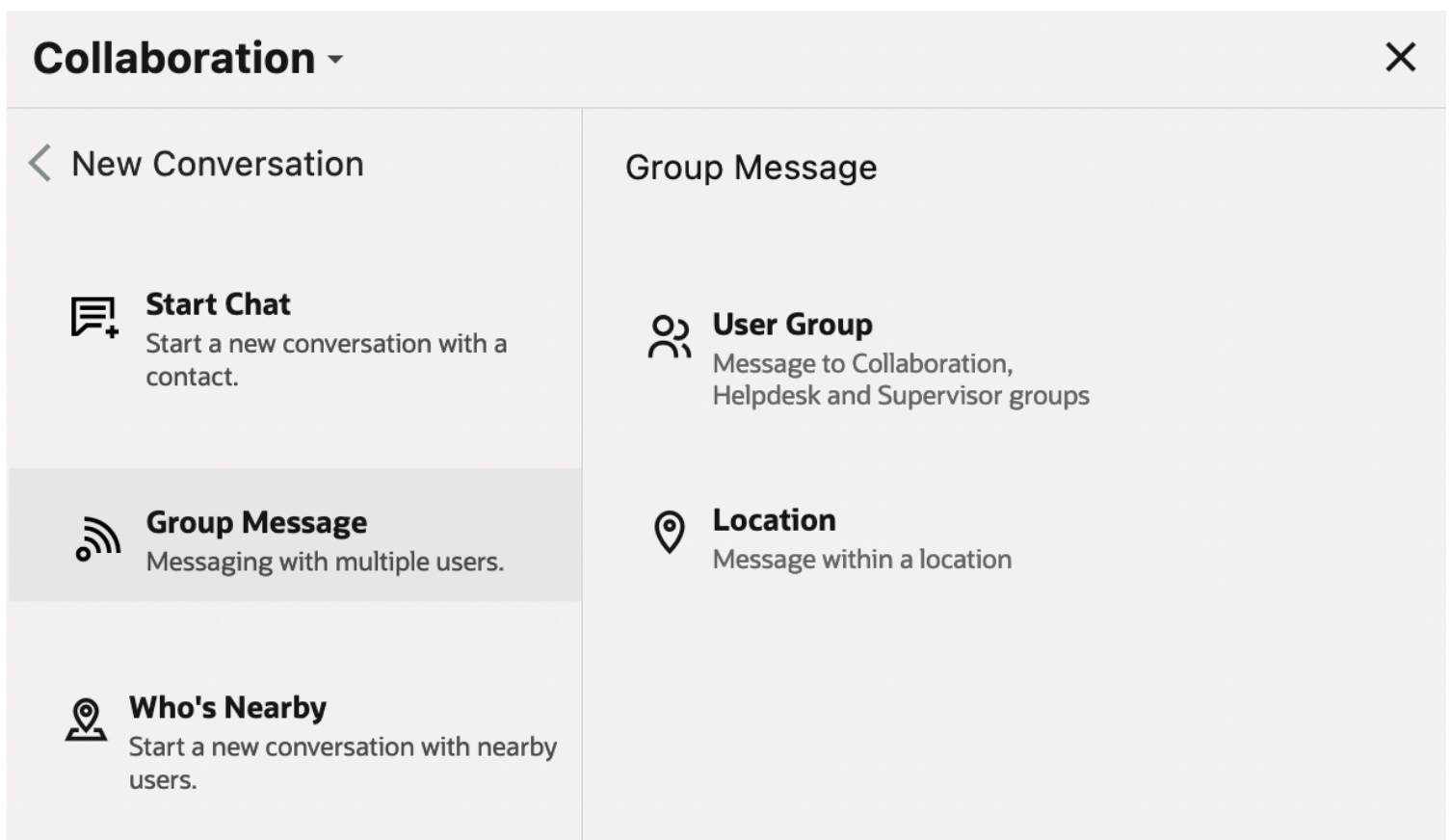
Group Messaging: Send messages to a group of users simultaneously. Subject to visibility settings and collaboration user groups defined in the system, you can preform the following high-level tasks:

- Initiate group messages
- Send group messages to multiple users in a location
- Broadcast messages
- Initiate conference chats
- Broadcast activities

Message Broadcasting: Broadcast a common message to a group of users simultaneously so that the receiver can take appropriate action based on the information. You can broadcast a message with the following features:

Feature	Description
List	View the list of users selected for broadcasting.
Location	Select the location to initiate group message. System filters the users near that location based on the radius configured.
Radius	Adjust the radius (up to a max. of 100 miles or kms) to filter the users near a location. **Note:** You can configure the unit of radius in **Configuration** > **Business Rules**.
Broadcast message statistics	View the list of users who received the messages successfully.
	View the list of users who have read and acknowledged the messages.
	Receiver can accept and reject the messages received.
Update	Send the updated broadcast messages. Send the message notifications for an already broadcasted message.
Configure Expiry	Configure expiry period for a broadcasted message. Broadcasted messages are not delivered after the message expiry.
Chat	Receivers can initiate a one-to-one chat with the sender, even if you acknowledged or unacknowledged the broadcasted message.
	Control the incoming chat pop-ups based on your preferences. You can block the pop-ups for a specific browser, initiate and continue conversation from any monitor and setup visual display that you have turned-off the pop-ups for a session.
History	You can history of all the broadcasted messages saved in the chat **History**.

Activity Broadcasting: Transfer an activity to multiple users simultaneously with these rules:

- The user that accepts the transfer request first is assigned with the activity.
- The sender is notified if the receiver do not accept the activity with in a defined time limit.
- Before broadcasting an activity, the system filters the users based on the activity attributes like work skill, work zone and service window and then broadcasts the activity to the eligible users only.
- The User that accepts the broadcast message can interact with the sender through a one-to-one chat.
- An activity can be broadcasted even when the users are offline. The users can view the broadcast when they come online.

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- The Technicians cannot accept the activity if they are offline.

> **Note:** The **Allow Activity Move Between Resources** permission is required for a user to broadcast the activities.

Conference Chat: Initiate a conference chat with a group of users to communicate business specific information with multiple users simultaneously.

- Initiate a conference chat with the users based on your visibility settings.

- You can choose the receivers from a group for the conferencing purpose. The group can be collaboration user group, dispatcher group, or users in a location.

Related Topics
- Initiate a Group Message
- Broadcast an Activity to Eligible Resources
- Send a Group Message by Location

Initiate a Group Message

Subject to visibility settings and collaboration user groups defined in the system, you can send messages to a group of users simultaneously.

You need to have access to user groups to access this feature. You can select more than one user groups at a time. To initiate a Group Message (Broadcast or Conference):

1.

   From the **Collaboration** window, click the new conversation icon [icon] .
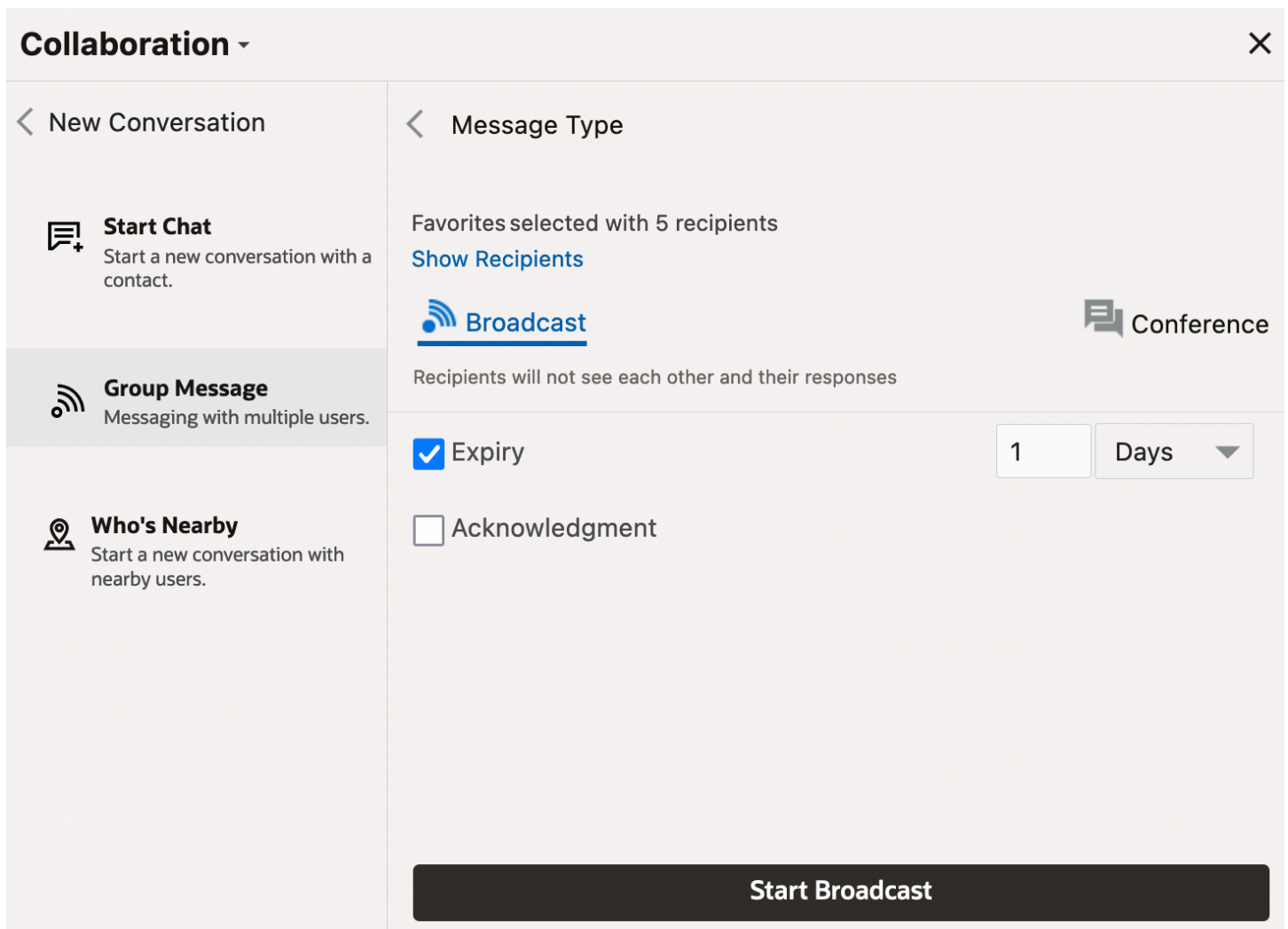2. Click **Group Message**.
3. Click **User Group** and select the appropriate group from the list.

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4. Click **Next**.

The **Message Type** window opens.

5. Select the message type icons from the following **Show User** options:

  ○ Broadcast: Recipients cannot see each other and their responses.

  ○ Conference: All users can see each other and their responses.

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6. If you select message broadcasting, setup:
  ○ Click **Expiry** to set the expiry time in minutes, hours, and days for the broadcasted message. The maximum limit for the expiry period is 10 days.

> **Note:** The expiry period for system chats and automatic broadcasting/activity chats is defaulted to 1 day (24 hours).
>
> - You can change the default value of 1 day (24 hours) based on your preferences only for group message and location broadcasting. However, you cannot change the default value of 1 day (24 hours) for activity broadcasting and automatic activity broadcasting.
> - The system broadcasting chats delivered to a user is available in active chats for 24 hours from the time of last message received in the same chat. The system broadcasting chats are moved to history after the 1-day (24 hours) period.
> - The automatic broadcasting chats delivered to a user is available in active chats for 24 hours from the time of last message received in the same chat. However, the automatic broadcasting user cannot view chats after the expiry period.
> - If there is an expired system or a new activity chat present in an active chat window, then all new messages are added to a new system message or to a new activity chat and the user can view both the expired and new system or activity chats in the active chat window.
>
> Also, the expiry period is displayed in the recipient's window.

  ○ Click **Acknowledgement** to activate acknowledgement notification for your broadcasted messages. You can view the acknowledgement statistics when the receivers acknowledges the message. You can also setup **Acknowledgement** when the broadcast has started.

7. Click **Show Users** to view the list of recipients. You can view ten users at a time till you reach 100 users.

8. Click **Start Broadcast** or **Start Conference** as per your need.

   The group message is initiated.

Related Topics
- Broadcast a Group Message
- Start a Group Conference

Broadcast a Group Message

You can use Broadcasting to communicate a common message with multiple users simultaneously. These users could be from a specific user group or a location. Broadcasting is not a conversation between users.

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Recipients do not see each other and do not know if others have received the same message. Recipients can acknowledge a broadcast message or initiate a one-to-one chat with the sender.

1.

From the **Collaboration** window, click the new conversation icon ![icon] .

2. Click **Group Message**.

3. Click **User Group** and select the appropriate group from the list.

4. Click **Next**.

5.

Click the broadcast option ![icon] .

6. Fill up these fields:

- o Click **Expiry** to set up expiry time in minutes, hours, and days for the broadcasted message. The maximum limit for the expiry is 10 days. The recipients can see the expiry time setup in their windows.

- o Click **Acknowledgement** to activate the message acknowledgement option. Receivers can acknowledge the message and you can view the statistics of the acknowledged messages. You can also set up **Acknowledgement** when the broadcast starts.

7. Click **Start Broadcast**.

The **Broadcast** window opens.
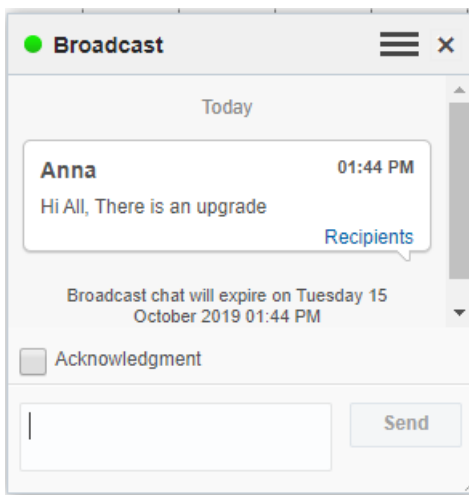
8. Enter the broadcast message and click the send icon.

9. Click **Recipients** to view the broadcast attributes such as acknowledged, read, successfully delivered, and not delivered counts.

If you have set up the acknowledgment option, you can view the list of users who read the broadcast message, to whom the message was successfully delivered, and to whom it was not delivered. If the count of recipients is more than 100, you can see only the count of users in each category. The user name and avatar are not displayed.

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10. The recipients can then open the broadcasted message and click:

  ○ **Acknowledge**: Send the acknowledgement to the sender.
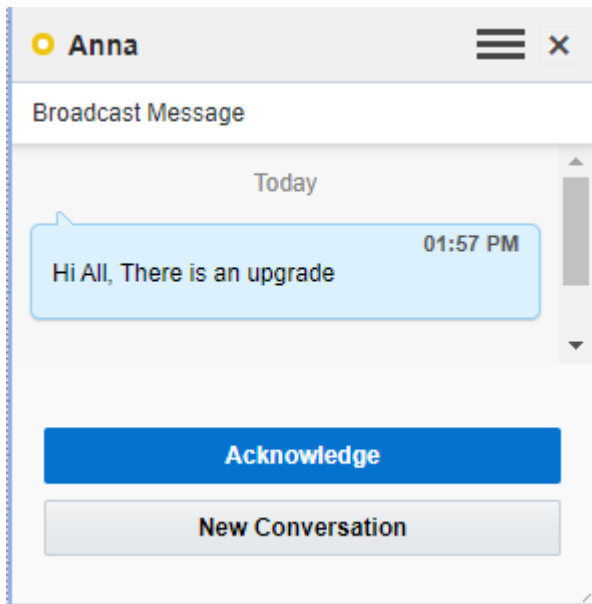
  ○ **New Conversation**: Start a one-to-one chat with the sender.

Start a Group Conference

You can use the Conferencing feature to initiate a group conversation and share a message to all the group members including the full list of participants of the chat.

You can select the recipients from the Collaboration user group or from a location. Currently, you can initiate a conference with 100 users simultaneously. All users can see each other and their responses in the conference.

1.

From the **Collaboration** window, click the new conversation icon

2. Click **Group Message**.

**3.** Click **User Group** and select the appropriate group from the list.

4. Click **Next**.

> **Note:** If the user group has only one user, then you can select the **Start Chat** link to initiate a one-to-one chat conversation.

5.
Click the conference option .

6. In the **Add Conference Name** field, add a name for the conference.

7. Click **Start Conference**.

8. Type the conference message and click the send icon.

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9. Click **Show** to view the list of recipients.

   The recipients can leave the conference, invite a user, and share their location with the sender.

10. If you want to start a one-to-one conversation, tap a user from the list and click **New Conversation**.

Broadcast Messages to Supervisor Groups or Helpdesk Groups

If you are a supervisor or a helpdesk operator, use the **Group Message** option on the **Collaboration** window to perform these actions:

- Select supervisor groups and broadcast a message or initiate a conference.

- Select helpdesk groups and broadcast a message or initiate a conference.

Be aware of these points:

- If you are a supervisor, you can broadcast message to all the members in a supervisor group, even if the visibility between you and the members of the group is not configured. However, you cannot have a one-to-one chat with another supervisor user, if the visibility is not configured between the groups (that is, if you and the user belong to different groups).

- If you are a supervisor, you can can initiate a conference to all the members in a supervisor group, even if the visibility between you and members of the group is not configured. However, you cannot have a one-to-one chat with a user, if the visibility is not configured between the groups (that is, if you and the user belong to different groups).

- If there is only one user in a supervisor group, then a one-to-one conversation is initiated, only if the user has permissions to chat with another user.

To broadcast a message in a group or initiate a conference with the team members:

1. Log in to the Manage interface as a supervisor user.

2. From the **Collaboration** window, click the new conversation icon .

3. Click **Group Message** and then click **User Groups**.

   The supervisor groups that you monitor and the collaboration user groups that are visible to you are displayed.

4. Select the required user groups and click **Next**.

5. Click the **Broadcast** or **Conference** option and the click **Start Broadcast** or **Start Conference**.

6. Type the message in the **Broadcast** or **Conference** window and click the send icon.

   The message is sent to the users in the selected user groups.

7. Click **Recipients** to view the broadcast attributes such as acknowledged, read, successfully delivered, and not delivered counts.

8. Similarly, if you are a helpdesk operator, use these steps to broadcast a message or initiate a conference:

   a. Log in to Oracle Field Service Core Application as a helpdesk operator.

   b. Repeat steps 2 through 7.

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Send a Group Message by Location

You can select the users near a specific location in the map view to send a group message. You can also adjust the radius, up to a maximum of 100 miles or km, to filter the users near the location.

You can define the location radius unit as miles or km in **Configuration** > **Business Rules** > **Map Parameters**. You can view the selected list of recipients before broadcasting the message (10 at a time till a maximum of 100 users are reached).

1.

From the **Collaboration** window, click the new conversation icon .

2. Click **Group Message**.
3. Click **Location** and select the appropriate group from the list.

   The count of the users nearby the selected location appears. The area in which you are searching shows a shaded circle. When you search within your current location, your location and the shaded circle is displayed in blue. When you search in a custom location, which is different from your current location, the location and the shaded circle is displayed in red.
4. Enter the message and click **Send**.

   Tip: If the Location group has only user, you can select the **Start Chat** link to initiate a one-to-one chat conversation.

Prerequisites for Automatic Broadcasting

You can automatically broadcast an activity to multiple users simultaneously whenever an activity is created in a bucket.

After an activity is broadcasted, the receivers have an option to accept or reject the activity. The activity is assigned to the receiver who accepts the activity. In case of assignment failure or time out, the system triggers an alert to the users.

Configure these prerequisites:

- Make sure that your company has a subscription to the Collaboration service and that it is enabled.

- Create a bucket with active technicians. See the Add a resource type for the bucket role section in the *Administering Oracle Field Service Guide*.

- Make sure technicians in the bucket are enabled with the **Allow activity move via chat** collaboration permission. See the Enable Collaboration Permissions topic.

- Make sure technicians in the bucket are enabled with appropriate work skill, work zone and active calendar. See the *Working with Resource*, *Managing resource work skills*, and *Managing resource work zones* in the *Administering Oracle Field Service Guide*.

- Create a message scenario to send assignment failure or time out alert message. See the *Create a Message Scenario* section in the *Administering Oracle Field Service Guide*.

- See the *Configuring a Routing Plan* section in the *Using Routing Guide* to create a routing profile with immediate routing plan.

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- See the *Assignment and Fallback options for activity broadcasting* section in the *Using Routing Guide* to configure the following options:
  - Select the via collaboration assignment option.
  - Configure a time out period for activity assignment.
  - Configure a fallback option that must run when the activity fails or when the system times out.

Broadcasting New Activity Automatically

Whenever an activity is created in a bucket, Routing can automatically broadcast it to multiple users simultaneously.

Only resources with matching work skills, work zones, and active calendars are included during an activity broadcast. See the *Assignment and Fallback options for Activity Broadcasting* section in the *Oracle Field Service Using Routing Service Guide* for more information.

After an activity is broadcasted, the **New activity** header displays in the Collaboration window and the resource has an option to accept or reject the activity assignment.

The activity is assigned to the first resource who accepts the activity. If the assignment fails or times out, the application triggers an alert to the users.

When a resource accepts the activity, other resources in the same Collaboration window see the message,

```
Activity reassigned to another user.
```

A resource who rejects the activity sees the message,

```
You have rejected the activity reassign.
```

> **Note:** The **Accept**, **Reject**, and **Timeout** options work in the same way when you use the **Activity Move** option in the Collaboration window to transfer the activity.

Broadcast an Activity to Eligible Resources

You can broadcast an activity to multiple users simultaneously, subject to the visibility of users.

You can broadcast an activity or its details using these methods:

- Broadcast an activity to eligible resources, so they can accept or reject it
- Broadcast only activity details by sharing the activity through a group message
- Broadcast only activity details to a user group by dragging the activity

> **Note:** You must have the **Allow activity move between resources** permission to broadcast activities. To broadcast an activity to eligible resources:

1. Open the **Activity Details** page for a pending activity that you want to broadcast.
2. Open the **Collaboration** window and click the new conversation icon.

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3. Click **Group Message** > **Activity**.

The application searches for resources that match the activity attributes such as work skill, work zone, and service window and then broadcasts the activities. You can view the selected list of recipients before broadcasting the message (10 at a time till a maximum of 100 users are reached). The recipient who accepts the transfer request first is assigned with the activity. The recipient can interact with the sender through a one-to-one chat. The maximum time period for the message expiry is 10 days. This table describes the options for recipients:

Click	To
Accept	Have the activity assigned to you.
Reject	Reject the activity.
New Conversation	Start a one-to-one chat with the sender.
Details	View the activity schedule, direction, and duration details.
Options menu > **Leave Broadcast**	Leave the broadcast message.

Results:

Broadcast Activity Details by Sharing the Activity

You can broadcast an activity to multiple users simultaneously, subject to the visibility of users.

You can broadcast an activity or its details using these methods:

- Broadcast an activity to eligible resources, so they can accept or reject it
- Broadcast only activity details by sharing the activity through a group message
- Broadcast only activity details to a user group by dragging the activity

Note: You must have the **Allow activity move between resources** permission to broadcast activities.To broadcast the details of an activity by sharing it:

1. Open the **Activity Details** page for the activity that you want to broadcast.
2. Open the **Collaboration** window and click the new conversation icon.
3. Click **Group Message** > **User Groups**.
4. Select the user group to which you want to broadcast the activity.
5. Click **Next** and then click **Start Broadcast**.
6. To view the recipients, click **Show Recipients**.
7. To specify the days or hours after which the message would expire, select Expiry. Add a number and select Days, Hours, or Minutes.

   A broadcast activity can be available for a maximum of 10 days. Resources who are offline see the broadcast when they become online. If a message expires by the time a resource becomes online, it's deleted from the active chat; the resource can only see it in the message history.

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8. Click **Share Activity** in the actions menu.

   The details of the activity are displayed in the **Enter Message** field.

9. Click the Send icon.

   The recipients receive the activity details. If you had selected **Acknowledgment** before sending the message, you can see the number of users who read the message, who received the message, and the number of users to whom the message wasn't delivered.

Results:

Broadcast Activity Details by Dragging the Activity

You can broadcast an activity to multiple users simultaneously, subject to the visibility of users.

You can broadcast an activity or its details using these methods:

- Broadcast an activity to eligible resources, so they can accept or reject it
- Broadcast only activity details by sharing the activity through a group message
- Broadcast only activity details to a user group by dragging the activity

Note: You must have the **Allow activity move between resources** permission to broadcast activities.To broadcast the activity details to a user group by dragging the activity:

1. Open the Dispatch Console.
2. Open the **Collaboration** window and click the new conversation icon.
3. Click **Group Message** > **User Group**.
4. Select the user group to which you want to broadcast the activity.
5. To view the recipients, click **Show Recipients**.
6. To specify the days or hours after which the message would expire, select Expiry. Add a number and select Days, Hours, or Minutes.

   A broadcast activity can be available for a maximum of 10 days. Resources who are offline see the broadcast when they become online. If a message expires by the time a resource becomes online, it's deleted from the active chat; the resource can only see it in the message history.

7. Click **Start Broadcast**.
8. Drag a pending activity to the **Enter Message** field in the Collaboration window and then click the Send icon.

   The recipients receive the activity details. If you had selected **Acknowledgment** before sending the message, you can see the number of users who read the message, who received the message, and the number of users to whom the message wasn't delivered.

Results:

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8 Share Resources, Activities, and Inventory

Share a Resource

You can use Collaboration to provide supplementary information to a specific Collaboration user. Sharing resource includes sharing information about the resource and the activity details with another user or helpdesk operator.

1. Open the **Collaboration** window with the user or helpdesk.
2. Select a bucket in the resource tree.
3. Drag and drop the resource that you want to share from the list to the chat window.
4. Click **Send**.

   The addressee receives the resource shared.

Share the Details of an Activity

You can share the details of an activity with another resource or a help desk user using Collaboration, as part of your work.

1. Open the **Collaboration** window with a user or help desk.
2. Go to **Dispatch Console**, select a bucket in the resource tree.

   All the activities in the selected bucket appear.
3. To share an activity, drag it to the Collaboration pane and:
   a. Click the **Send info** option.
   b. Click the Send icon.

Results:

The recipient receives the activity details such as activity type and time slot.

Transfer an Activity

You can transfer a pending activity to another resource or a help desk user using Collaboration, as part of your work.

You can't transfer the activity, if any of these conditions is true:

- You don't have the necessary permissions.
- The action isn't permitted by the activity type settings.
- The activity status is other than Pending.

1. Open **Collaboration** with a user or helpdesk.
   You can transfer an activity only during a one-to-one chat.

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2. Go to **Dispatch Console**, select a bucket in the resource tree.

   All the activities in the selected bucket appears.

3. To transfer an activity, drag it to the Collaboration pane and:
   a. Click the **Transfer** option.
   b. Click the Send icon.

4. Or, transfer the activity from the **Activity Details** page:
   a. Open the **Collaboration** window.
   b. Select the user to which you want to transfer the activity.
   c. Click the options menu and select **Share/Transfer activity**.
   d. Click the Send icon.

Results:

The recipient receives an alert to accept the activity. The activity is transferred or reassigned only after the recipient accepts it. If the transfer is canceled because the transfer times out or fails, you can transfer it again using any of these procedures.

Share an Inventory Item

You can share an inventory item with the user/helpdesk you are chatting with.

Inventory transfer is not available if:

- You don't have the necessary permissions.
- The action is not permitted by the inventory type settings.
- You are not in a one-to-one chat.
- The Inventory does not belong to the technician's pool.

To share or reassign an inventory item:

1. Open the **Collaboration** window with a user or helpdesk.
2. Open your **Inventory details** page.
3. Transfer the inventory from the **Inventory details** page:
   a. Open the **Collaboration** window.
   b. Select the user to which you want to transfer the inventory.
   c. Click the options menu and select **Transfer inventory**.
   d. Click **Send**.

Accept a Moved Activity or an Inventory Item

You must accept the activities or inventory assigned to you, for them to be added to your schedule.

If you receive an activity or inventory item through the **Collaboration** window, you receive a message notification.

1. From your **Collaboration** window, open the chat received.

   The chat window opens with the activity or inventory attached.

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2. To add the activity or inventory to your schedule, click **Accept**.

3. To reject the activity or inventory, click **Reject**.

Cancel a Move

You can cancel moving an activity or inventory item any time before the new owner accepts it. If the new owner has already accepted, you cannot move it back to the original owner.

1. In the **Collaboration** window, locate the chat bubble that includes the move action.

2. Click **Cancel**.

   When an activity reassignment or inventory transfer starts, the recipient sees the basic details of the activity or inventory. They can either **accept** or **reject** the transfer. If the recipient doesn't accept or reject the transfer for a significant period of time, or if the recipient accepts but the transfer takes too long, then the operation times out. Reassignment or transfer is also cancelled automatically, if the sender or the recipient leaves, or a new contact joins the chat before its completion.

Transfer of Non-serialized Inventory in Manage

You can transfer a fixed quantity of non-serialized inventories between resources.

You can perform the following actions:

- View the total number of available inventories and the required number of inventories for a future activity.

  Note: You can have more number of inventory available than what is projected in the application. Therefore, you can transfer more inventory than the available quantity. In that case, the application is updated with a negative value for available quantity.

- Define the required number of inventories that you want to transfer in the **Collaboration** window.

To transfer non-serialized inventory:

1. Navigate to **Inventories** page for a specific resource.

2. Open the **Collaboration** window and click the options menu ⋮ .

3. Click **Search Contact** to locate a user.

   For example, let's say you want to transfer the inventories to William. Locate William in the Search Contact list and select William to open the chat window.

4. Select the non-serialized inventory that you wish to transfer and drag and drop it to the chat window.

5. Select the **Transfer** option in the chat window.

6. Enter the quantity that you wish to transfer in the **Quantity** field.

7. Click **Send**.

   The recipient should accept the inventory transfer to complete the process.

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8. To view the updated inventory in the Manage interface, select **View** from the **Actions** column.

   You can transfer or receive a maximum of 2,147,483,647 units of inventory.

9. To view the updated inventory select **Inventory** and view the Inventory list.

Reassign an Activity or Inventory

You can reassign an activity or inventory to another resource.

1. Locate the activity or inventory item that you want to move.
2. Open the **Collaboration** window.
3. Search for a user or select a user from your Address Book, for which you want to move the item.
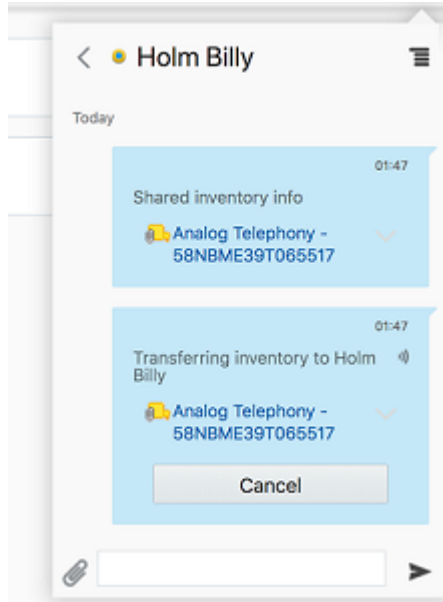
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4.
Click the options menu [⋮] .

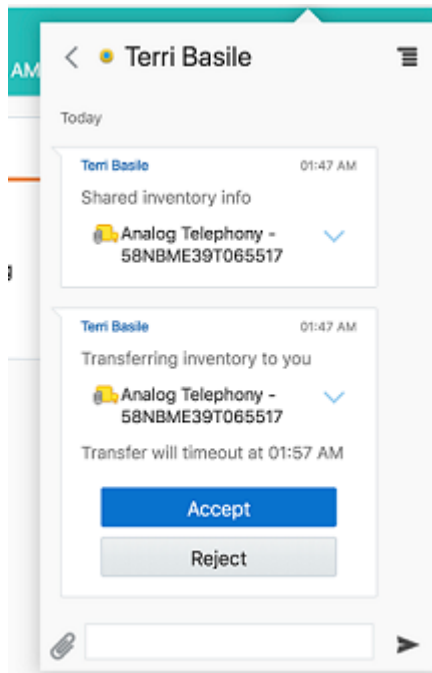○ For activities, choose **Reassign Activity**.

- Sender Side Activity Transfer
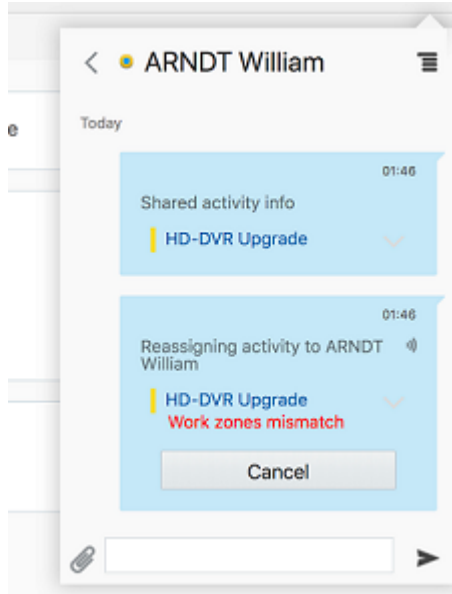
- Receiver Side Activity Transfer Example
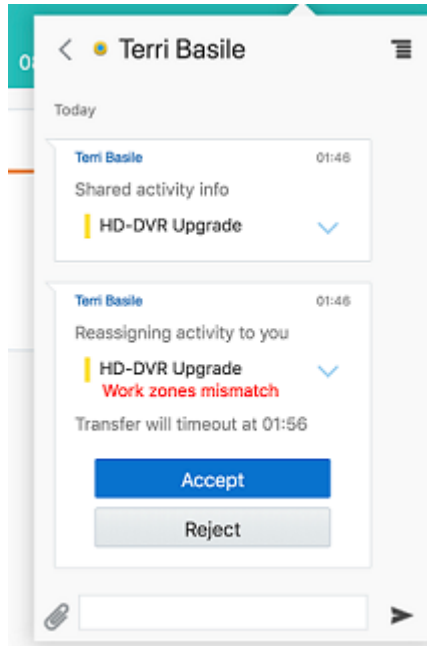
○ For the inventory items, select **Transfer Inventory**

- Sender Side Inventory Transfer Example

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- Receiver Side Inventory Transfer Example

5. Click **Send**.

   The addressee receives the message: Shared activity/inventory info {Activity/Inventory icon} {Activity/Inventory identifier}.

Accept a Helpdesk Request

You can accept an incoming request from a helpdesk operator through the **Helpdesk** tab within the **Collaboration** window.

The **Helpdesk** tab is designed for helpdesk operators. You can access this tab only if you have helpdesks assigned. When you are part of a helpdesk you can see the **Helpdesk** tab in the **Collaboration** window. The **Helpdesk** tab displays a list of online and offline helpdesk operators. The helpdesk tab displays a number next to it, representing the number of unaccepted requests.

A helpdesk operator cannot initiate a conversation. Operators can only respond to the requests received from resources. To start participating in a conversation, the operator must first acknowledge the request.

To respond to helpdesk requests:

1. Log in as a helpdesk operator.
2. Open the **Collaboration** window and go to the **Helpdesk** tab.
3. Click the name of the Helpdesk to view the unanswered requests.

   Note: The helpdesk window supports a maximum of 100 unanswered requests.

4. Select the request that you want to answer.

   The chat window opens and the chats from the requestor appear.

   Note: Unless the operator takes the chat, it is marked unacknowledged. The time stamp turns red if the threshold time crosses. The time displayed is the average waiting time in all the active chats. The waiting time in a chat is reset only when the requestor leaves the chat.

5. Click **Take Chat**.

   When an operator takes a chat, the conversation is acknowledged, and the operator can answer the questions. The acknowledged conversations can be transferred to another helpdesk operator. The user who requested assistance is also notified. Also, the reason for transfer (if provided) is displayed in the **Helpdesk** tab.

   If there are no pending requests for assistance, an operator can help out with chats in progress with the other helpdesks operators.
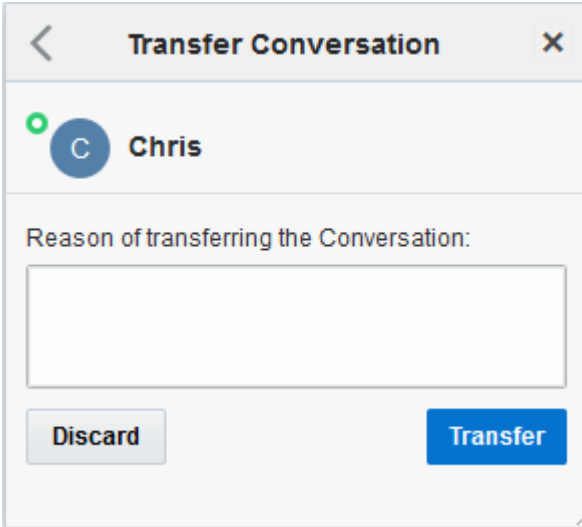
   Note:
       o The **Helpdesk** tab displays the count of new chats, only for new messages on a helpdesk chat. However, when the user accesses the **Helpdesk** tab, the count disappears.
       o When a helpdesk operator transfers a chat to the same helpdesk or to any other helpdesk, the transferred message is displayed as a new message in the **Helpdesk** tab.
       o When a user logs in or refreshes their browser, the unread counter displays the total number of all unread chat messages.

6.
   To view the chats in progress, click the options menu ⋮ in the **Helpdesk** tab and then click **Chats in Process**.

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Transfer a Helpdesk Conversation

You can transfer a request to another helpdesk agent suitable to fulfill the request.

1. Log in to the application as a helpdesk operator.
2. Open the **Collaboration** window and go to the **Helpdesk** tab.
3. Click the transfer chat icon
4. Select the helpdesk operator to whom you want to transfer the conversation.

   The **Transfer Conversation** window displays.

5. Enter a reason.
6. Click **Transfer**.

Share Files from your Device

You can share files, documents, and images in one-to-one conversations, helpdesk chats, or in group conversations such as conferences or broadcasts. You can also upload a file from your device gallery to another user using the **Collaboration** window. Recipients can either view or download the shared files to their devices.

Before you start

- Ensure that the **Share images via chat permission** option is enabled for theOracle Field Service Mobile app users.

- Ensure that the file storage is set up in the application for using the Share Image functionality.

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To share files from gallery:

Here's what to do

1.
   From the **Collaboration** window, click the new conversation icon [icon] .

2. Search for a user and select it, or select a user from your Address Book.

3.
   Click [icon] .

4. Click **Attach File** and select a file from the device gallery. Or, click **Attach Image** to take a photo and share it with the user.

   The file types that you can attach include: DOC, DOCX, ODT, PDF, XLS , XLSX, ODS, ODP, PPT, PPTX, TXT, CSV, RTF, and all types of image files. The maximum size of a file you can transfer is 5 MB. You can see an appropriate error messages when you attach an unsupported type of file, or the file size exceeds 5 MB. The selected file or the photo captured is uploaded to the chat window. The recipient can preview the image and download the file (if required).

   > **Note:**
   >
   > ○ The selected image is automatically re-sized to 800 pixels (width).
   >
   > ○ The above steps may vary based on the device and the operating system.

Share your Location

Share your location to meet a technician and collaborate with each other to perform the activities. You can share your location as a micro map and receive the direction assistance to a location based on your native map application.

Use this feature to:

- Share your location through a micro map.

- Change your current location in the micro map and share updated location with other technicians.

- View the location with distance in between the location points.

- Get the driving assistance link to reach the location.

- View the expected time to reach the destination.

To share location other technicians:

1. Open the **Collaboration** window with a resource.

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2.

From the options menu ⋮ , click **Share Location**.

Your current location is attached as a micro map. Ensure that you have enabled the location sharing option on your browser. If you do not see **Share Location**, start your route and start an activity.
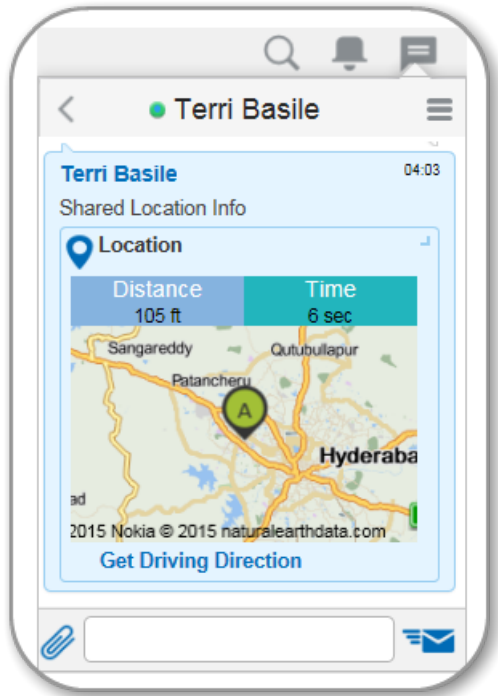
3. To update your location, click inside the map and select another location.

4. Click the send icon.

Directions are sent as Micro maps, Google maps, or Oracle mapview based on your company configurations.

5. The receiver can then click **Get Driving Directions** to view the directions.

A map opens showing the directions to the marked location with the Time and distance to reach the location.

Related Topics

- Get Driving Directions

Get Driving Directions

View the direction assistance link and the location map when a mobile user reaches out to you.

The **Get Driving Direction** link invokes the map view based on your device as follows:

- Android users - The application invokes your native map application. You can select the appropriate application for the direction assistance.

- iPhone users - The application invokes the native apple map application for the direction assistance.

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- Other devices - The application redirects to the Oracle map. You can get text based direction assistance to the location.

To obtain driving assistance:

1. Open the chat along with the location details received from a user.

   The chat window with location map opens.
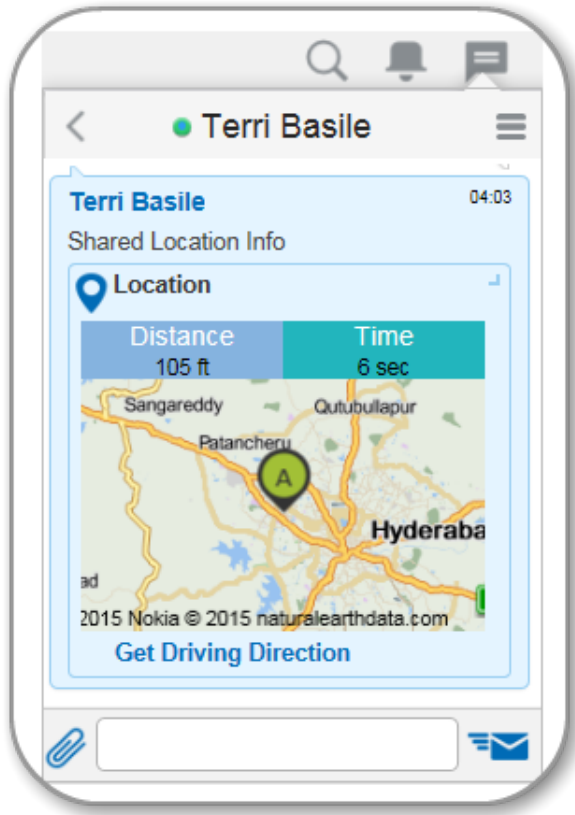
2. Click **Get Driving Direction**.

   Map view appears based on your native map application and shows the travel distance and time details.
3. Click the distance option in the map view.

   A driving hint with directions to reach the location appears.

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Revision History

This document will continue to evolve as existing sections change and new information is added.

Date	What's Changed	Notes
November 2022	These topics are updated: • Collaboration Window • Send a Group Message by Location	
November 2021	These topics are updated: • Start a Chat Conversation • Share Files from your Device	
August 2021	This topic is added: Notifications in the Collaboration Window This topic is updated: Collaboration Window	
November 2020	• The topics under the 'Share resources, activities, and inventory in Manage' and 'Share resources, activities, and inventory in Mobility' chapters are merged into the 'Share Resources, Activities, and Inventory' chapter with appropriate changes corresponding to Core Application. • This topic is added: o Add Contacts to or Remove Contacts From Address Book	

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Date	What's Changed	Notes
	• These topics are updated:	
	○ Collaboration Window	
	○ Search for a Contact	
	○ Locate Nearby Resources	
	○ Use the Options Menu	
	○ Start a Chat Conversation	
	○ Start a Video Call	
	○ Call a User	
	○ Start a Conference	
	○ End a Chat or Conference	
	○ Retrieve a Closed Chat or Conference Thread	
	○ Initiate a Group Message	
	○ Broadcast a Group Message	
	○ Start a Group Conference	
	○ Broadcast Messages to Supervisor Groups or Helpdesk Groups	
	○ Send a Group Message by Location	
	○ New Activity Broadcasting	
	○ Broadcast an Activity	