Field Service

Using Forecasting Cloud Service

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F75105-03

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Preface

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

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center.

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1 Get Started

About Forecasting

You use forecasting to analyze historical data, forecast workload, and plan capacity based on the historical data analysis.

Forecasting is essential in planning performance and capacity, as you can plan for anticipated events based on the trends. For example:

- You can use forecasting to estimate whether your workforce is sufficient to meet the anticipated demand. You
 can also prepare for spikes in the demand based on various events, such as marketing campaigns and natural
 disasters.
- While natural disasters are difficult to predict, you can use your past experience of handling similar situations to plan sufficient standby personnel.
- Advertising campaigns, on the other hand, are planned in advance and Forecasting can be an important part
 of that planning. For example, if a cable television company offered a special Christmas package last year, the
 historical data reflects a spike in the connecting activities in the last December. When a similar campaign is
 planned, forecast can indicate the estimated workforce needed to cover the increased demand. The company
 can use that data to evaluate in-house capacity and, if necessary, engage contractors to cover that period. The
 company can also use forecasting to predict a lull in demand over the summer months and schedule vacations
 for its own personnel over that same period.

You can use Oracle Field Service Forecasting Cloud Service not just to forecast workload, but to analyze gaps in your mobile workforce. As Forecasting includes permission-based access, you can control the information that your supervisors and technicians can view. Your managers with local focus can view a forecast, plan, or capacity and compare at specific time durations or by specific working areas. At the same time, they can roll up the information for viewing at a corporate level, across an entire company. It is a single source of information regardless of who accesses it.





2 Use the Interface

The Interface

You can use the Oracle Field Service Forecasting Cloud Service interface for all forecasting and planning-related activities, including importing and exporting data and modifying plans.

The message, 'Recalculation of forecasted data is disabled. To view updated forecasted data, enable 'Recalculate data on a daily basis' within Configuration -> Business Rules. The data will be updated overnight.' is displayed, if your administrator has deselected the **Recalculate data on a daily basis** setting on the **Configuration** > **Business Rules** page. This setting is deselected by default for test instances.

This table describes the components of the interface:

Interface Component	Action
Resource Tree	View the organization's resources hierarchically, typically sorted by geographical region. Resources are grouped into Buckets and Groups.
Bucket	Select a bucket to manipulate data in the forecast plan. A bucket includes groups and resources, and can have activities.
Resource Tree Filters / Resource Search	Filter the resources within the resource tree.
Calendar	View the forecast data for a selected date range.
View	Restrict the data display for specific capacity categories and/or time slots using the filters.
Export	Export the forecasted data from Oracle Field Service in CSV format. The exported data is useful if you want to perform further calculations on the data or if you want to use the data in another system.
Import	Import the CSV formatted data into the Oracle Field Service Forecasting Cloud Service.
Set Plan	Adjust the forecasted plan by a fixed percentage. The percentage can be adjusted with a constant percentage or by Week/Month/Year.
Available Resources	View the number of work-minutes available for the specified date and bucket. The Available Resources line is always shown in orange. This line is displayed only at the bucket level and not at the capacity category or time slot level.
Actual Workload	View the number of work-minutes used for a specified date, capacity category and time slot in the past. Only activities with a valid time slot and an associated valid capacity category are considered in calculating the Actual Workload. The Actual Workload line is always shown in green.
Forecasted Workload	View the number of work-minutes predicted for a specified date, capacity category and time slot. The data is calculated based on the past values of Actual Workload. The Forecasted Workload line is always shown in yellow.
Forecasted Min. Workload	View the minimum forecasted workload that needs to be completed each day, when there are SLA based activities. The data is calculated based on the past values of Actual Workload. The Forecasted Min. Workload is always shown in yellow.
Forecasted Max. Workload	View the maximum forecasted workload that can be completed each day, when there are SLA based activities. The data is calculated based on the past values of Actual Workload. The Forecasted Max. Workload is always shown in brown.



Interface Component	Action
Booked Workload	View the number of work-minutes booked for the future dates in the Quota page. The Booked Workload is always shown in blue.
Service Planner View	View the data in a cumulative form starting from the current date.
Demand Forecaster View	View the data in non-cumulative form. Data for both past and future dates are displayed.
Plan	View the plan, which is plotted as per the value set using Set Plan over the Forecasted Workload .

Access the Interface

You can select a date range, filter, and view the historical data to analyze and forecast quota and capacity in the Oracle Field Service Forecasting Cloud Service interface.

To access Forecasting from Oracle Field Service Core Application, click **Dispatch** and select **Forecasting** from the drop-down list.

Use this section to get an overview of the Oracle Field Service Forecasting Cloud Service page, and features that you can use in forecasting.

Related Topics

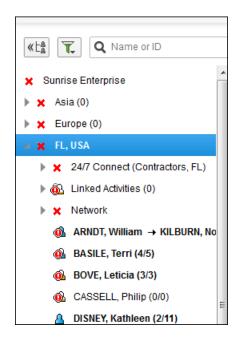
- · Resource Tree
- The Toolbar
- Filter Information in the View Tab
- View Data by Calendar Intervals
- · Set a Forecasting Plan

Resource Tree

You can see a hierarchical view of the organization's resources, typically sorted by the geographical regions, in the resource tree.

This screenshot shows a resource tree:





There are three types of items in the resource tree:

- Organization units
- Buckets
- Resources

Note: You must select a bucket from the resource tree to work with the data that you want to forecast.

The Toolbar

You can use the toolbar to access all the options to import and work with the data to produce a forecast, and to export forecasted data to other systems.

You can access these features from the toolbar:

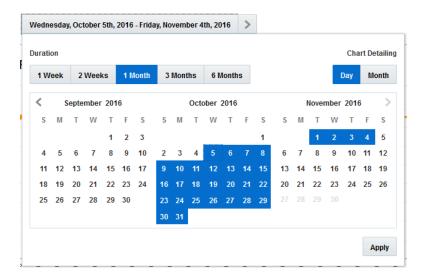
- Calendar
- View
- Export
- Import
- Set Plan



View Data by Calendar Intervals

Use the calendar to choose the date range and the period to view the forecast.

The date is displayed next to the bucket name. This screenshot shows the calendar:



1. Click Dispatch > Forecasting

The **Forecasting** window opens.

- 2. Use the forward and back arrows on the calendar, and select the period for which you want to request data.
- 3. Click the dates shown in the field to open a calendar that provides five time-interval options:
 - o 1 Week
 - 。 2 weeks
 - 1 Month
 - 。 3 months
 - 6 months
- **4.** Select a time interval, and then click the start date on the calendar to display the data for that period. The left and right arrows in the date field move the calendar to the selected period of time.
- 5. Select either Day or Month depending on the unit of time period that the data is to be displayed.

Filter Information in the View Tab

Use the **View** tab to fine-tune the information you see in the forecast display.



Use the options in the drop-down lists to select the filters and restrict the data display to specific capacity categories and/or time slots.

Set a Forecasting Plan

Use the **Set Plan** option to modify the plan above or below the forecast by a given percentage. For example, make incremental changes to the plan in response to new information, such as severe weather predictions.

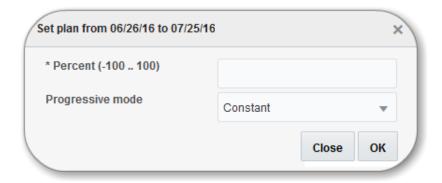
Use this feature to set the plan for the capacity bucket that you have selected.

- Click Dispatch > Forecasting
 The Forecasting window opens.
- 2. Click **Set Plan** to the set the plan for the desired bucket and date range.

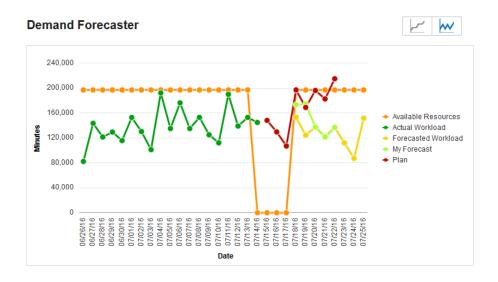


3. Choose the time interval that corresponds to the one you chose in the calendar.

The **Set Plan** dialog is displayed, as shown in this screenshot:



This screenshot shows the Demand forecaster with the new plan:



4. Enter a percent to set the desired difference between forecasting and planned values. The available range is from -100% to 100%.

For example, if you set the percent to -5, you are setting your plan to 5% less than the forecast. Setting 5% sets the plan to 5% more than the forecast.

- 5. Select a progressive mode to define how the planned values progress over time. Four mode options are available:
 - Constant: Plan values are calculated as the fixed difference from the forecasting values for the entire period
 - Weekly: Plan values increase by the specified percent on a weekly basis
 - o **Monthly**: Plan values increase by the specified percent on a monthly basis
 - Yearly: Plan values increase by the percent annually
- 6. Click **OK** to create or update the plan.



'Available Resources' Trend Line

View the **Available Resources** trend line when you select a particular capacity category or time-slot from the **View** drop-down options.

You can associate a Resource with multiple capacity categories and time slots. When you do this, the **Available Resources** for a particular capacity category or time slot depends on the time shared with other capacity categories and time-slots. Based on this information, Available Resources is displayed as three different values for each day:

- **Min. Available Resources:** Denotes the minimum available resources for a particular view, assuming that the resources shared with another view, are not included in this view. This value is calculated based on the worst case scenario, where only resources that don't share their time with other capacity categories or time slots are included.
- Max. Available Resources: Denotes the maximum available resources for a particular view, assuming that all the shared and not-shared resources are available in this view. This value is calculated based on the best case scenario, where the entire time of all resources in that view are included.
- Average Available Resources: Denotes the actual number of resources available, assuming that the resource time is divided equally among each capacity category and time slot that the resource is associated with. This represents the most realistic quantity of resources available for that particular view.

Example to calculate available resource values:

A resource has these associated time slots and capacity categories:

• Time slots: 11-1, 1-3

Capacity Categories: Install, Uninstall

Min. Available Resources: Only the undivided resource time is considered, as shown in this screenshot:

Time slot/Capacity Category	11-1	1-3	*
*	120	120	240
Install	0	0	0
Uninstall	0	0	0

Average Available Resources: Overlapping time is split proportionately, as shown in this screenshot:



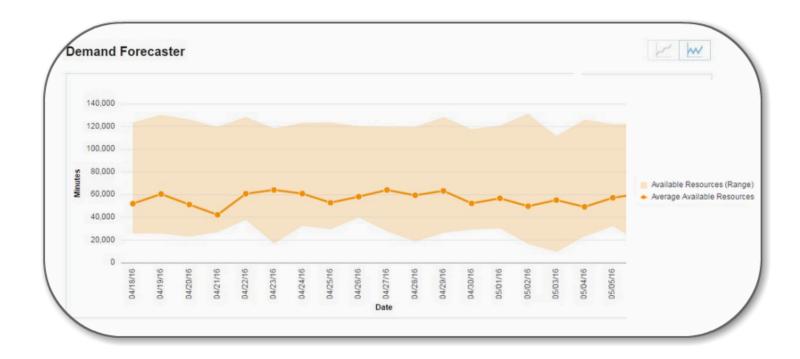
11-1	1-3	*
60	60	120
60	60	120
120	120	240
	60	60 60 60 60

Max. Available Resources: Maximum availability of the resources

1-3	*
120	240
120	240
120	240
	120

The resulting available resource details are plotted as a graph, as shown in this screenshot:





In the graph, select a particular capacity category or time slot, the Available Resources are plotted based on the values of Min. and Max. Available Resources. The **Average Available Resources** trend is displayed as a separate line. All three trend values (Min., Max. and Available Resources) are displayed in the grid below the graph. Overrides can be added only to the Available Resources trend line.

Note: The three values of the **Available Resources** is run as a script once a day. If you modify the resource calender, the changes are shown only on the next day.





3 Import and Export Data

Overview of Importing and Exporting Forecast Data

You can import and export forecasting data in CSV format. Exporting lets you to process the data in the external applications.

For example, you may choose to use Oracle Field Service Forecasting Cloud Service "as is" (with only slight **Set Plan** changes) for the duration between 4 months and 12 months. However, your forecasting analyst may find that planning in a tighter time frame (maybe less than four to six months) requires additional information from outside sources.

You may plan a marketing campaign for certain areas of the country. Or, you may notice that this year's weather patterns over the Pacific Ocean indicate a greater amount of rain in certain months over certain areas. Your analyst can use the robust import and export tool to change the plan in applications such as Microsoft Excel, Microsoft Access, or Google Spreadsheet and then upload the updates.

Importing Data

You can import data in CSV format.

Standard lines such as Actual workload, Forecasted Workload, Booked Workload, Plan, and Available Resources that the application generates are not overwritten when you import data with the same name. Instead, the application imports all such data as 'Custom lines' and displays as separate trend lines. The application overwrites data when you import non-standard lines such as overrides to standard lines, or custom lines with the same name.

Ensure that the lines in the CSV file include:

- Bucket external ID: The external ID of the bucket selected on the Resource Info page.
- **Parent ID:** This is the external ID of the parent of the line. The line would have been created using the Override function on the parent.
- **Data type:** The type of data imported.
- **Name:** The name of the data defined as custom line. This parameter is used to differentiate between custom lines when several custom lines are used in the same chart.
- **Date:** The date of the data that is imported in ISO format.
- Time Slot: The time slot of the data which is imported. Time slot labels are set under Time Slots on the Configuration page.
- **Capacity category:** The capacity category of the data which is imported. Capacity category labels are set under **Capacity Categories** on the **Configuration** page.
- **Minutes:** The number of minutes needed for the specified date, capacity category, and time slot. Depending on the type of data, this value can be historical, forecasted, planned or custom value.

Things to keep in mind when importing data:

• Data imported from a CSV file must contain whole numbers (no decimals) only.



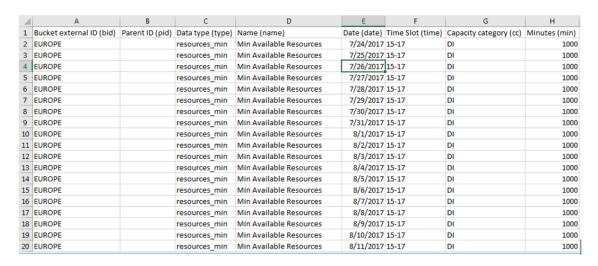
Note: You cannot upload data in the Microsoft Excel format. Use a text editor to create the CSV file.

- If you want to format the data fields, you should first export the template, make necessary changes and import the updated template into the application.
- You can upload a file of a maximum of 1.5 MB in a single upload. If your data set is larger than 1.5 MB, upload it
 multiple times.
- An error message appears when you upload a file that is too large: Error occurred during file uploading.
- You can upload data for multiple buckets with a single upload file.

Exporting Data

You can export CSV-formatted data from Oracle Field Service Forecasting Cloud Service. The exported data doesn't show in Microsoft Excel format as this feature doesn't support Microsoft Excel.

This screenshot shows the data exported to CSV format, which is opened in a spreadsheet:



You can export these types of data:

- Actual Workload
- Forecasted Workload/ Forecasted Max. Workload/ Forecasted Min. Workload
- Available Resources (Min, Max and Avg if available)
- Plan
- Booked workload
- Overrides (Lines added using the "Override" functionality)
- Custom lines (Additional data that you add to a chart or table. For example, you can add data from another bucket for comparison and analysis.)

The lines in the exported CSV file contain this data:

Bucket's external ID: The external ID of the bucket selected in the Technician/Bucket Info page.



- **Parent ID:** This is the external ID of the parent of the line. The line would have been created using the "Override" functionality on the parent.
- **Data type**: The type of data exported (history, forecasting, sla_start, sla_end, booked, resources_min, resources_max, resources_avg, or custom_line).
- Name: The name of the data defined as custom line. This parameter is used to differentiate between custom lines when several custom lines are used in the same chart. For History, Forecast, SLA Start, SLA End, and Plan data types the Name column will contain Actual Workload, Forecasted Workload. Forecasted Max. Workload, Forecasted Min. Workload, and Plan depending on the data.
- **Date**: The date of the data that is getting exported in ISO format.
- **Time slot**: The time slot of the data that is getting exported. Time slot labels are set under **Time Slots** on the **Configurations** menu.
- Capacity category: The label of the capacity category that is getting exported. Capacity category labels are set under Capacity Categories on the Configurations menu.
- **Minutes**: The man-minutes needed for the specified date, capacity category and time slot. Depending on the type of data this value can represent history, forecasted, planned or custom value.

Export Forecast Data

You can export CSV-formatted forecast data.

- On the Forecasting page, click Export and then click OK.
 The exported file is saved.
- 2. Access the exported file and perform these steps:
 - **a.** Change the header in column A and remove the additional characters from the **Bucket's external ID**. This includes question marks, quotation marks, and exclamation marks.
 - **b.** Add the updated data, you want to import, into this new file. Ensure that the **Bucket's external ID** in column A does not have additional characters.
 - **c.** Save the new file that you created as a .CSV file.

Import Forecast Data

You can import the forecasting data in CSV file format.

- 1. On the **Forecasting** page, click **Import**.
- 2. Click **Browse** and select the file to import.
- 3. Click OK.

The new lines appear on the **Forecasting** page, and the name of the new line is displayed in the legend.

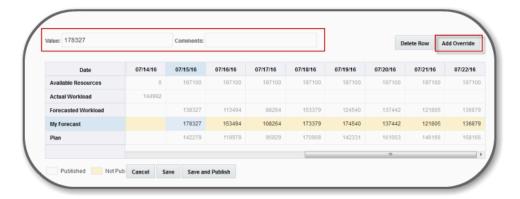


Override Forecast Values

Override and publish the forecasted workload data and resources in the forecasted rows. You can also perform a what-if analysis and share it with other resources. You cannot edit the original four rows (five in case of presence of SLA based activities). You can add overrides to only future values of Available Resources, Forecasted Workload/Forecasted Max. Workload/Forecasted Min. Workload or another override.

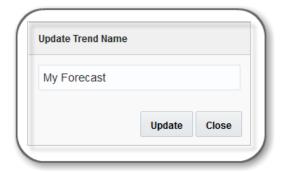
- 1. Click Dispatch > Forecasting.
 - The **Forecasting** page opens.
- 2. Select a bucket from the resource tree that you want to update.
- Select a row from the Actual Workload, Forecasted Workload/Forecasted Max. Workload/Forecasted Min. Workload, or another override.
- 4. Click Add Override.

A new row appears with the values same as previous row for future dates, as shown in this screenshot:



5. Double-click the label.

The **Update Trend Name** dialog box opens, as shown in this screenshot:



6. Rename the label and click **Update**.

The trend name is saved.



- 7. Select a single cell or multiple cells from the row.
 - The **Value** and **Comments** text fields appear.
- **8.** Enter the overridden **Value** and a **Comment** if necessary.
 - The comment is added as a triangular flag in the cell and opens as a hint pop-up on hover.
- 9. Click Save.

The overrides are saved as your local copy only.

Note: Rows in white background indicate that the row is published and will be visible to all the users. Rows in yellow background are not published and are only visible to the current user. The legends provide the descriptions.

10. Click Save and Publish.

The overrides are saved and published to all the users.





4 Charts and Tables

Chart and Table Views

You can view Actual Workload, Forecasted Workload, plan, and Available Resources data in two modes – line chart and table view. The table view is displayed below the chart view.

Related Topics

- Forecasting Charts
- Forecasting Tables

Forecasting Charts

You can view the Actual Workload, Forecasted Workload, plan, and Available Resources data in line-chart mode.

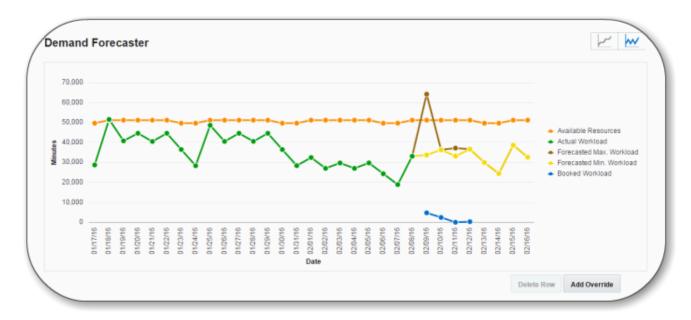
The X-axis of the chart represents time (in days), the Y-axis represents workload (in man-minutes). The chart may contain up to five basic lines:

Line	Description
Available Resources	The number of man-minutes that were available for the specified date and bucket. The Available Resources line is always shown in orange. This line is displayed only at the bucket level and not at the capacity category or time slot level. The legends are displayed on the right of the chart.
Actual Workload	The number of man-minutes used for the specified date, capacity category, and time slot. Only activities with a valid time slot and an associated valid capacity category are considered in calculating the Actual Workload. The Actual Workload line is always shown in green. The legends are displayed on the right of the chart.
Forecasted Workload	The number of man-minutes predicted for the specified date, capacity category and time slot. The data is calculated based on the past values of Actual Workload. The Forecasted Workload line is always shown in yellow. The legends are displayed on the right of the chart.
Forecasted Min. Workload	Shows the minimum forecasted workload that needs to be completed on each day in case, there are SLA based activities. The data is calculated based on the past values of Actual Workload. The Forecasted Min. Workload is always shown in yellow. The legends are displayed on the right of the chart.
Forecasted Max. Workload	Shows the maximum forecasted workload that can be completed on each day in case, there are SLA based activities. The data is calculated based on the past values of Actual Workload. The Forecasted Max. Workload is always shown in brown. The legends are displayed on the right of the chart.
Booked Workload	The number of man-minutes that have been booked for future dates in the Quota page. The Booked Workload is always shown in blue. The legends are displayed on the right of the chart.



Note: If there are SLA based activities, the Forecasted Workload line is not displayed. However, Forecasted Min. Workload and Forecasted Max. Workload are displayed.

This screenshot shows the Chart view with the available resources and their workload:



You can select any or all of the check boxes located in the upper right to display the type of data to be shown in the line chart. When you select a check box, the corresponding line in the diagram is highlighted. When any of the lines are shown or hidden, the chart is rescaled to fit all data, and the lines are dynamically redrawn according to the new scale.

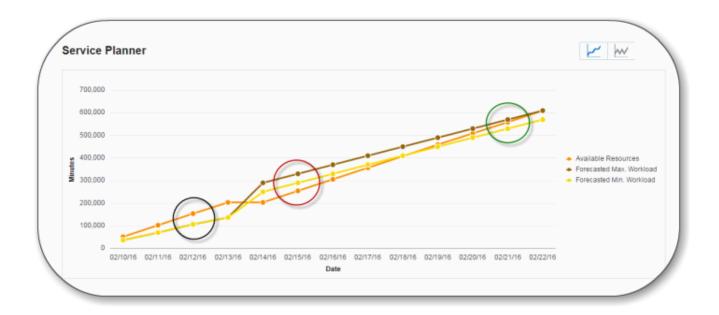
Hovering over a line displays a the line name and the time and values that correspond to the selected point in that line.

Manage Resources in Service Planner

Click the cumulative view icon to display all data for future dates in a cumulative form, starting from the current date. Past data is not displayed in this view. Data in the table view is also updated accordingly.

You can use the Service Planner to get a clearer picture of resource constraints and idle resource time, as shown in this screenshot:





- If the Available Resources line is above the Forecasted Max. Workload, it indicates that there is not enough workload for the available resources and hence, there will be some idle time. (Circled in black)
- If the Available Resources line is below the Forecasted Min. Workload/Forecasted Workload, it indicates that
 there is more work to be completed than available resources. Hence, there is a resource constraint and some
 activities may miss their SLA windows. (Circled in red)
- If the Available Resources line is above the Forecasted Min. Workload but below the Forecasted Max. Workload, there is no resource constraint or idle time. (Circled in green)

Using this information, users can reduce resources from certain dates and increase resources in certain other dates so that SLA's are not missed and resources don't sit idle. Modifications and what-if analysis can be performed on the data using the **Add Override** feature. See Override Forecast Values.

Related Topics

Override Forecast Values

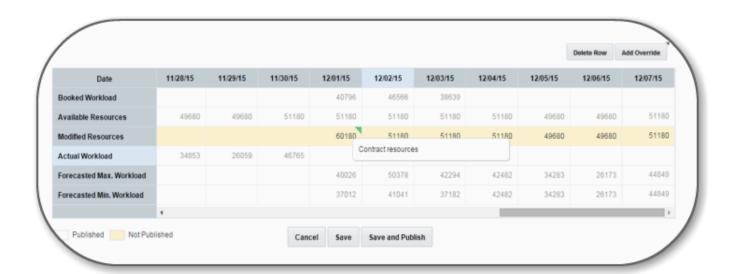
Forecasting Tables

You can display forecasting, plan and capacity data in the table-view mode.

You can view **Actual Workload**, **Forecasted Workload**, **Plan** and **Available Resources** data in the table view mode below the chart view. The table and chart views show the same data. However, in the table view you have the **Add Overrides** option, that lets you add overrides to the future data. Published data is shown in a white background and the non-published data, which is not visible to other users, is shown in a yellow background. You can identify the cells that have comments easily, as they are highlighted with a green triangle. The green triangle and the comment appear when you hover over the cell.

This screenshot shows the table view of forecasting plan and capacity details:







5 Forecasting and Capacity

View Forecasting Plan

A primary input to Oracle Field Service Forecasting Cloud Service (from Oracle Field Service Capacity) is the **Max. Available time** value. In Oracle Field Service Forecasting Cloud Service, Max available time is referred to as **Available Resources**. You can view the plans that are created in Oracle Field Service Forecasting Cloud Service in the Quota

Management as an additional column in the Quota table. Whether the plan is based solely on a relationship with the

Forecast (using the **Set Plan** function) or on a file upload, the plan number is applicable by capacity category, day, and time slot and is read-only in Oracle Field Service Capacity.

Note: A resource with a specific user type in Oracle Field Service Capacity has limited access to the forecasting plan information.

- To display the Plan column in the Quota table, click Configuration > Display and then select Enable Plan column that shows data set in Forecasting.
- Navigate to the Quota page. Click Plan in the View drop-down list. Show planning must be checked to display the Plan column.

The **Plan** column containing the planned values appears in the **Quota** table at the **Capacity** category level.

Share Capacity and Forecasting Data

Oracle Field Service has many integrated modules that enable you to analyze and share data using the available tools.

The information exchange (inputs and outputs) denotes sharing data generated in Oracle Field Service Capacity and Oracle Field Service Forecasting Cloud Service it in the **Quota** page for a selected bucket.





Revision History

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

Date	What's Changed	Notes
August 2022	This topic is updated: The Interface	



