

Field Service

Using Cloud Portal for Oracle Field Service

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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](#).

Documentation Accessibility

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Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

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1 Introduction to Cloud Portal

Cloud Portal

The Cloud Portal provides information about the service for which the user has an active subscription.

Note: You can manage your subscriptions in Cloud Portal, only if your instance has been provisioned before May 1, 2022. If it has been provisioned after this date, you can manage your subscriptions in OneConsole.

Cloud Portal is the centralized access point where you go to manage your Oracle Cloud deployments and instances. Cloud Portal provides options for both monitoring and operating your services. The **My Accounts** feature allows you to monitor the status of services for an entire account, across multiple data centers and identity domains. My Account displays information about active, expired, and pending services. The **My Accounts** feature lets you monitor and operate all active services within a single identity domain. You use **Oracle Cloud Applications Console** to perform all operating tasks after your services are activated.

For more information about the Cloud Portal, see the [Cloud Portal library](#) on Oracle Help Center.

Field Service and Cloud Portal

In this document, you can find the information that is specific to Oracle Field Service settings for Cloud Portal.

Oracle Field Service Cloud Service is available only if you have completed the following activities:

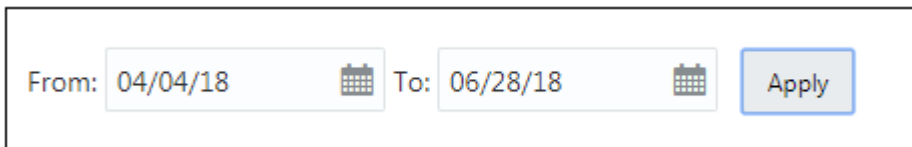
- **Subscription Provision Request**— You must have requested to provision an instance for Oracle Field Service.
- **Activating the Service** — You get an e-mail confirmation after the subscription request is fulfilled. Activate the service using the activation link provided in the e-mail.

2 How You Monitor Your Usage

View Usage Details in Billing Metrics

You can use the Cloud Portal to view the service usage anytime. Open the Billing Metrics tab to know the details about the Oracle Field Service usage and the charges for the usage.

You can view the billing metrics for any specific period using the Calendar selection.



The screenshot shows a date selection interface. It features two date input fields: 'From: 04/04/18' and 'To: 06/28/18'. Each input field has a calendar icon to its right. To the right of the 'To' field is a blue 'Apply' button.

Download Resource Information as CSV File

You can download the resource information as a CSV file using this option.

Under the Billing Metrics tab, click **Download as CSV** file.

Results:

You can either open the CSV file and view it or Save the file.

Resource Summary

The Resource Summary lists the resources based on which you are billed for the Oracle Field Service Service.

The Billing Metrics information is calculated based on one of the following resources:

- Hosted Named Seat Month
- Hosted Named User
- Appointments

The metrics information is populated for only one of the above resources that is included with your contract.

3 Business Metrics

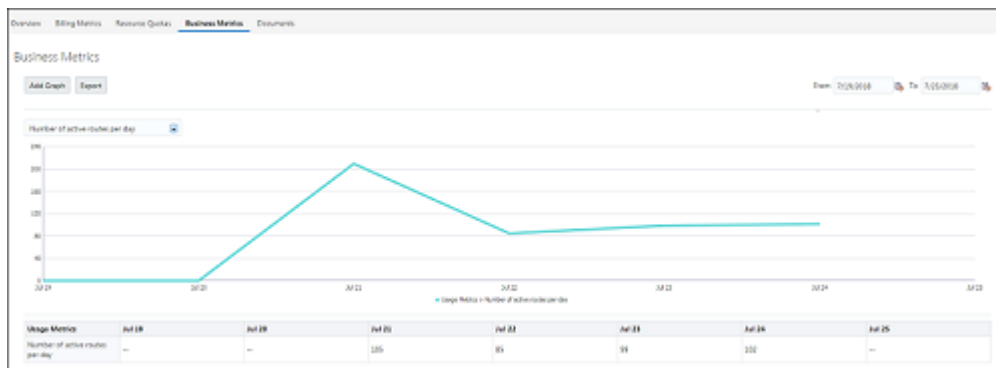
View Business Metrics for Any Period

The Business Metrics tab provides the details about the business metrics displayed on the Cloud Portal.

Note: The Business Metrics is calculated at the end of the day and only for the Production environments.

To view the Business Metrics for a particular period, use the procedure below:

1. Click the Calendar and select the dates for which you want to view the business metrics.
2. From the drop-down list, select the type of business metrics you want to view. The specific Billing Metrics appears as a graph.



Types of Business Metrics

The following table lists different types of business metrics:

Metrics	Description
File management: number of files	Provides information about a file storage usage metric, namely: number of requests to File storage grouped by day
File management: number of bytes	Provides information about a file storage usage metric, namely: number of transferred bytes grouped by day
Number of logged users	Provides information about the number of active users that logged into the system grouped by day
Number of technicians	Provides information about the number of active Field resources grouped by day
Number of activated routes	Provides information about the number of active routes grouped by day

Metrics	Description
Number of sent messages	Provides information about the number of messages sent out through the Notification Engine grouped by day
Number of auto-routed activities	Provides information about a Routing usage metric, namely: percentage of auto-routed activities
Number of manually assigned jobs	Provides information about a Routing usage metric, namely: percentage of manually assigned jobs
Number of not-routed jobs	Provides information about a Routing usage metric, namely: percentage of not-routed jobs
Routing Usage	Provides information about a Routing usage metric, namely: a number of routing runs per day
Average Travel Time	Provides information about a Travel time metric, namely: average travel duration per day.
Number of assigned appointments	Provides information about the number of assigned jobs metric, namely: average number of assigned jobs per Field resource per day
Number of completed assignments	Provides information about the number of completed jobs metric, namely: average number of completed jobs per Field resource per day
Number of cancelled appointments	Provides information about the number of cancelled jobs metric, namely: average number of cancelled jobs per Field resource per day
Number of suspended appointments	Provides information about the number of suspended jobs metric, namely: average number of suspended jobs per Field resource per day
Number of not done appointments	Provides information about a number of not done jobs, namely: avg. number of not done jobs per Field resource per day
% of appointments started in time	Provides information about the percentage of jobs that started within Service window
% of appointments not started in time	Provides information about the percentage of jobs that started after Service window end time
% of appointments completed within SLA	Provides information about the percentage of jobs completed within SLA window
% of appointments completed outside SLA	Provides information about the percentage of jobs completed outside SLA window end time date and time

4 Service Console

About the Field Service Cloud Service Console

The Oracle Field Service Service Console provides details about the instances that you have subscribed to.

If you buy the base Stock Keeping Unit (SKU), it includes one Production instance and two Test instances. You can buy more Test instances, depending on your business need.

Your Provisioned Instances

The number of instances you get depends on the subscription.

Depending on the subscription, you get one production instance and at least two test instances. You can view the instance details by clicking **Open Service Console**.

The Open Service Console window shows the details of the instances related to the particular service.

Production Instance

The Production Instance has the following details:

- Subscription ID
- Instance Name
- Version
- URL

If the Production Instance is in configuration mode, the existing data in Production Instance is overwritten by the data copied from the Test Instances. When you move the instance to Production Go-Live mode, you can update the instance using the GUI, Export/Import, or using APIs only.

Test Instance

The Test Instance has the following details:

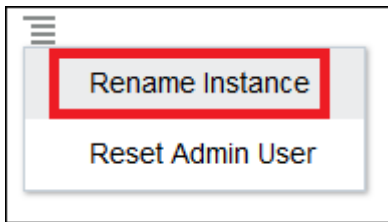
- Type
- Instance Name
- Version
- URL

Rename an Instance

You can rename an auto-generated instance name to a meaningful name, which becomes part of instance URL. This name is also visible to users on the Login page.

However, the auto-generated instance remains as is and the instance can be accessed using it.
To rename an instance:

1. Log in to Oracle Field Service Service Console with your credentials.
You can see the list of your subscribed instances.
2. Click the menu on the right of the instance that you want to rename.
3. From the drop-down list, select **Rename Instance**.
The **Rename Instance** dialog box appears.



4. Enter a valid name for your instance and click **Rename**.

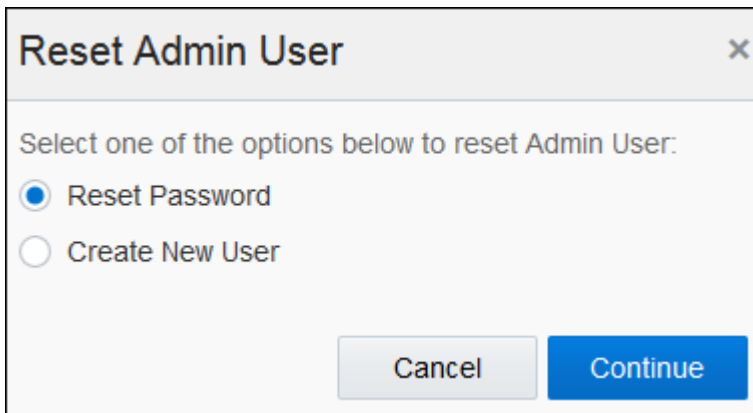
Note: A valid instance name can have numbers (0-9), lowercase letters (a-z), and dashes (-). The instance name must start and end with an alphanumeric number.

Reset an Admin User

You can reset an admin user by creating a new user or resetting the password for an existing administrator from the Oracle Field Service Service Console.

1. Log in to Oracle Field Service Service Console with your credentials.

2. Click the menu on the right of the instance for which you want to reset the admin password.
The **Reset Admin User** dialog box appears.



Reset Admin User

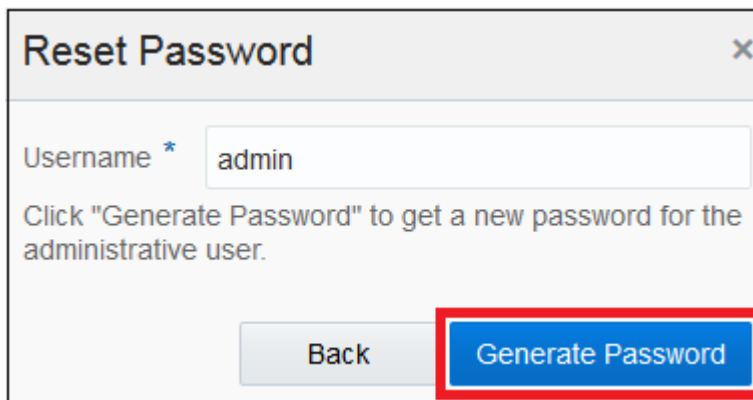
Select one of the options below to reset Admin User:

Reset Password

Create New User

Cancel Continue

3. Select **Reset Password** and click **Continue**.
4. Enter the admin username in the **Username** field.
5. Click **Generate Password**.



Reset Password

Username * admin

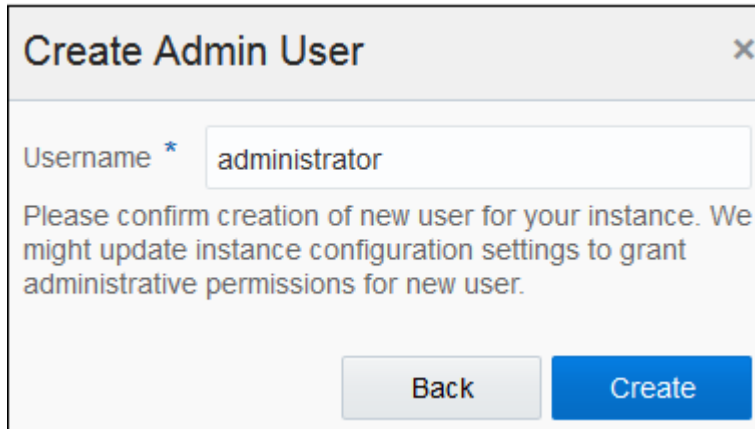
Click "Generate Password" to get a new password for the administrative user.

Back Generate Password

A confirmation window appears.

Note: You cannot reset the password for users that are associated with the 'SAML', 'LDAP', and 'OpenID' Login policies.

- To create a new admin user from the **Reset Admin User** window, select **Create New User** and click **Create**.



Create Admin User ×

Username * administrator

Please confirm creation of new user for your instance. We might update instance configuration settings to grant administrative permissions for new user.

Back Create

A confirmation dialog appears and shows 'Admin user has been created successfully'.

Move to Go-Live Mode

Initially, your Production instance is in Configuration mode. You can move this instance to Go-Live mode (or you can Go Live) after you complete configuring and testing the instance for all your business requirements.

When you are ready to move your Production instance to Go-Live mode, just click **Go Production to Live** on the **Available Environments** page in the Service Console. When your Production instance is in Configuration mode, you can copy the configurations from any Test instance. However, when you move to Go-Live mode, you must update the configuration only through the user interface, APIs, or by exporting and importing the settings.

You cannot re-create a Production instance that is in Go-Live mode.

5 Update Date Selection in Service Console

Selecting Update Date

You can manage the schedule of quarterly updates using the Service Console.

You can select the update date of your choice to build a flexible schedule of quarterly Updates, depending on your own preferences, business requirements, or any other reasons. In addition, you'll have more control over the instances, because it scheduling the update makes the process much simpler and transparent.

Oracle Field Service Update Process Rules

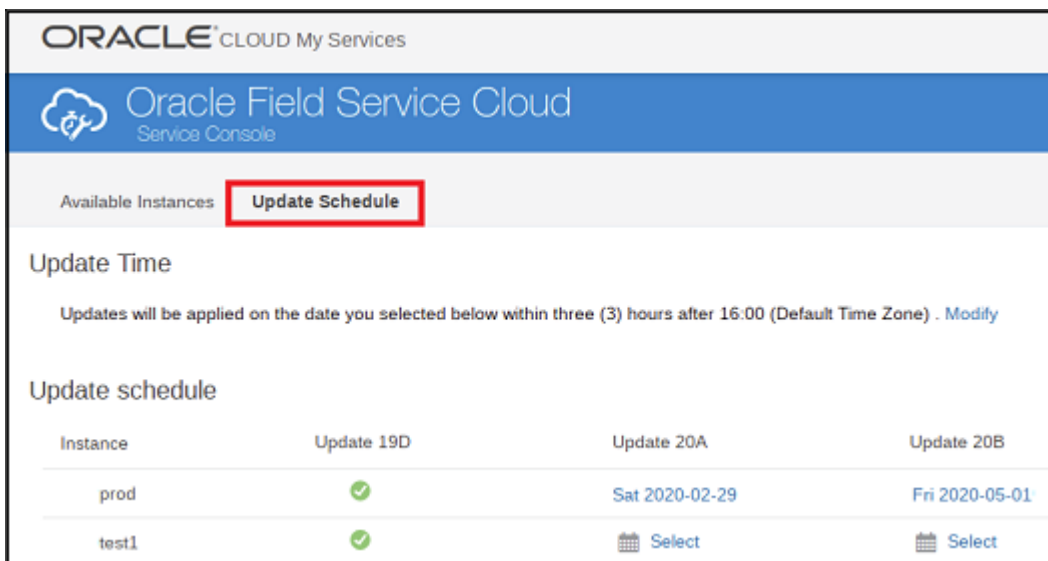
Some rules to keep in mind during the Update process.

- Oracle releases Updates four times a year. The Updates are available from the first Friday of each quarter in a year (in the months of Feb, May, Aug, and Nov).
- You can select any date within the quarterly Update period to schedule or re-schedule quarterly Updates for the respective Prod and Test instances. The quarterly Update period lasts for 60 days starting from the quarterly Update release date. Oracle manages the quarterly Updates for Test Preview instances and these cannot be configured.
- It's possible to pick update dates for four future GA updates. For example, if the current release is 21C, you can pick Update dates for 21D, 22A, 22B, and 22C.
- Oracle defines the number of updates and availability that can happen per day. The available dates are allotted on first come, first served basis.
- Updates are performed during the standard 3-hour update window. You can specify an update window, which is applied to all the instances in your subscription. If you do not specify any update window, the default update window is applied depending on the geographical region in which the hosting takes place.
 - North America (NA) and Latin America (LATAM) – AMER : Friday, 21:00 CDT/CST
 - Europe and Africa - EMEA : Friday, 21:00 BST/GMT8
- Update selection is not available in the following cases:
 - You have an Oracle maintained extension.
 - You don't have access to your Oracle Field Service instances from the Cloud Portal.
- Oracle reserves the right to cancel an update if the conditions are not optimal. In such a case, you'll be notified to select a different date.

How do I pick a date to schedule an Update?

You can manage a schedule for quarterly Updates from the **Update Schedule** tab and select the update dates for any of the quarterly Updates ahead. You can schedule updates for all the instances, except the **Test preview** instance, which is managed by Oracle.

1. Open the Service Console and go to the **Update Schedule** page.
 2. Identify the instance for which you want to schedule an update and click **Select** in the appropriate column.
 3. To schedule an update, pick any of the available dates from the calendar.
 4. To re-schedule an update, click a date that is shown as a link, and select a different date from the calendar.
- Completed updates appear as green check boxes and you cannot reschedule them. This screenshot shows the Update Schedule page:



Default Update Schedule

Oracle defines a default update schedule and this schedule is applied to all your instances.

If you don't want to use the default schedule, you can select a different schedule manually.

Here's the default schedule:

- 1st Friday of a quarter (in the months of Feb, May, Aug, and Nov) - Test Preview instance
- 3rd Friday of a quarter (in the months of Feb, May, Aug, and Nov) - Prod instance
- 4th Friday of a quarter (in the months of Feb, May, Aug, and Nov) - remaining Test instances

Update Scheduling Best Practices

- Plan the timing of your Prod and remaining Test instances to ensure your update is like-for-like.
- Allocate a sufficient amount of time to review and validate the new quarterly Update. We do not recommend continually shifting and pushing the Update out to the last available days since these days might be already fully booked by customers.

Configure the Update Window

The **Update Window** is a standard three hour duration allocated for running the updates that you can configure in the Service Console.

Update Window Best Practices

Configure the update window outside of the organization's standard business hours.

1. Click **Modify** in the **Update Time** section.
The **Setup Update Window** dialog box appears.
2. From the **Update Window Start** drop-down list, select the time at which you want to start the update window.
3. Select the required time zone from the Time Zone drop-down list and click **Save**.

View Request History

You can use the **Requests History** page to view the historical data of requests you have made from the Service Console. You can view details such as the requested operations, the requestor, and the request time.

Follow these steps to view request history:

- Navigate to the **Available Instances** tab and select **Request History** for the instance for which you want to see the history. Currently, the **Update was scheduled**, **Update was rescheduled** and **Recreate was requested** operations are recorded in the Request History. The history of requests is displayed in the 'from newest – to oldest' order. Each record represents a specific operation requested from Service Console for this instance.

Self-Scheduling Service Updates

You can manage the Oracle Field Service instances on your own, including scheduling Service Updates and quarterly updates. Scheduling Service Updates is a simple operation and doesn't require extra communications with Oracle.

You do not need to follow the pre-defined schedule to implement a Service Update for all the instances within a week. You can run Service Updates based on your convenience and your organization's rules and business processes.

Service Updates Applied by Oracle

Oracle is eligible to apply Service Updates to customer instances when issues impacting service availability are detected. These cases can consist of, but are not limited to security, performance, and infrastructural issues. When these issues are detected and fixes are provided, Oracle applies the Service Updates at its discretion.

Schedule your Service Updates

You can use the Cloud Portal to schedule the Oracle Field Service quarterly and service updates based on your convenience and your organization's rules and business processes. There is no extra communication required with Oracle, when you use this option.

1. Log in to your Cloud Portal account.

2. Click **Apply Service Update**.

The **Apply Service Update** dialog box displays the instance name, version, and planned update date. This indicates that a quarterly update or a Service Update is scheduled. You can use this data to pick a version for update and a time line. This screenshot shows the **Apply Service Update** dialog box:

Apply Service Update (acme) ×

Instance name of [redacted]

Version 21C

Planned Update Thursday, November 18, 2021 (21D)

Choose Service Update

21C Service Update 6 (most recent) ▾

When to apply Service Update

Within nearest update window - on August 9, after 23:00 (UTC-04:00) Santiago - Chile Time (CLT)

Apply now

Cancel Apply

3. Click **Choose Service Update** and select the update that you want to schedule.

The list includes the most recent Service Update and the instances where all other service updates are available. Typically, the *most recent* Service Update is the last released Service Update for a quarterly update. However, *most recent* is also the newest Service Update in a data center, where your instance is available. Oracle releases Service Updates on a weekly basis (typically, on Tuesdays). However, it takes some time to distribute them across all data-centers. During this routine, it might happen that versions of the *most recent* Service Update differ depending on geographical regions. That is, customers from Europe can apply the newly released Service Update, while for customers in North America the previous Service Update is shown as the *most recent*. The best practice is to wait until the newest Service Update appears; it should appear within a day.

You can also select a Service Update from another instance. Service Updates for other instances are shown only if the instances are running on higher versions when compared to the current instance selected to apply the Service

Update. For example, let's say there are four instances in subscriptions running on service updates 1, 2, 3, and 6 for Update 21C. If you want to apply another Service Update to the second instance of Service Update 2, 21C Service Updates 3 and 6 are available for selection, while Service Update 1 is not. This screenshot shows the Service Updates and their corresponding instances available for selection:

Apply Service Update (acme) [X]

Instance name o [redacted]

Version 21C

Planned Update Thursday, November 18, 2021 (21D)

Choose Service Update

21C Service Update 3 (from o [redacted])

21C Service Update 6 (most recent)

21C Service Update 3 (from o [redacted])

21C Service Update 2 (from o [redacted] and others)

Cancel Apply

4. Select one of these options under **When to apply Service Update:**

- **Within the nearest update window:** Select this option to start the service update during the update window that's configured for this subscription within the Service Console. Here, the date and time of the update is shown automatically in the update window's time zone. You can change the update window on the **Update schedule** page of the Service Console.
- **Apply now:** Select this option to start the Service Update right away.

5. Click **Apply**.

Oracle triggers the 'Service update scheduled' email. The 'Service update completed' notification is sent when the update completes. The request to schedule the service update is shown on the **Instance history** page. The record for the completed service update is also displayed on the same page.

Note: You can schedule a Service Update to a maximum of two days before the next planned update date.

6 Re-create an Instance

About Re-creating an Instance

You can re-create an instance by replacing the existing data of your Oracle Field Service instance with the data from another instance.

Alternatively, you can re-create the instance by changing the instance state to 'newly-provisioned' state.

The **Recreate Instance** option is present in the menu for every instance. In case of Test instances, you'll find this option always available.

The **Recreate Instance** option is available only from Update 19C or later.

Note: In case of a Production instance, the **Recreate Instance** option is shown until the instance is switched to 'Go-Live' mode. You can't view this option after the Production instance is in 'Go-Live' mode. Further, you'll only be able to copy configurations with or without data from Production to TEST instances, but not from TEST to Production.

How to Re-create an Instance

You can re-create an instance either by creating it from scratch or by copying data from another instance.

- Start Over — Use this option to start configuring the instance all over again.
- Recreate From Another Instance — Use this option to select a source instance, the data, and version for this operation.

Re-Create an Instance from Start

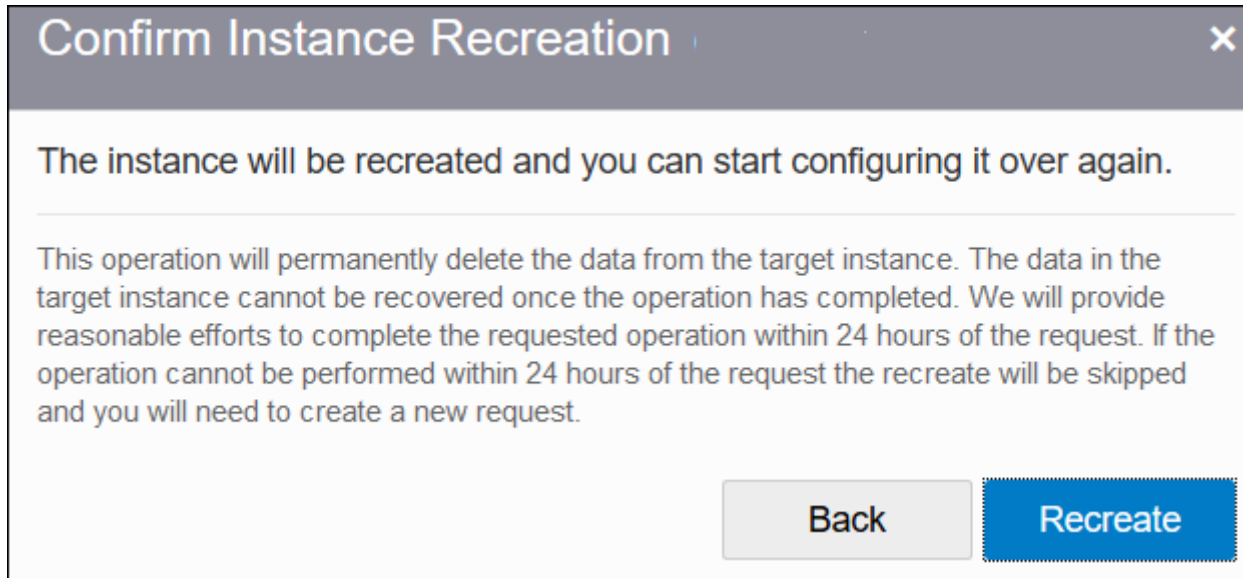
When you re-create an instance from the beginning, you re-create it with the default settings.

Note: You should have the admin rights to configure an instance. If you don't have the admin rights, you can create an admin user using the **Reset Admin User** option.

1. Open the Service Console.
2. Click **Start Over** and then click **Continue**.

3. On the **Confirm Instance Recreation** page, click **Recreate**.

This screenshot shows the **Confirm Instance Recreation** page:



Re-Create from Another Instance

You can re-create an instance from another instance when you want to use the existing data.

1. Open the Service Console.

2. Click **Recreate from Another Instance**.

This screenshot shows the Recreate from Another Instance dialog box:

3. Complete these fields:

Field	Action
Source instance	Select the instance from which you want to create a new instance.
Data to copy	<p>Select the type of data you want to copy over to the new instance. The options are:</p> <ul style="list-style-type: none"> ○ Configuration ○ Configuration and data for future ○ Configuration, data for future, and 7 days from the past <p>You can select the Configuration option only when you re-create a production instance.</p> <p>Some configuration elements are included and some are not when you re-create an instance from another instance. See the Data Copied and Not Copied when Re-Created from Another Instance topic.</p>
Version	Select how you want to handle the version. You can't view this field when the versions of both the instances (source and target) are same. Further, you cannot copy the version from the source instance when you re-create a 'Test preview' instance.

4. Click **Continue**.

5. On the confirmation page, click **Recreate** to continue with your selection or click **Back** to change your selection. You can use the **Start Over** option any number of times for an instance. However, you can use the **Recreate from Another Instance** option for an instance only once a day. If you re-create an instance using the **Recreate From Another Instance** option, it takes more time to process the data. For example, you have three TEST instances –

Test1, Test2, and Test3. You request a Re-create of Test2 from Test1, which means you can't request a Re-create of Test2 in the same day. However, you can request for a Re-create of Test3 from Test2.

What data is copied and not copied when re-created from another instance?

When you re-create an instance from another instance, some data is (or configuration elements are) copied and some is not copied.

This table gives the configuration elements that are copied when you re-create an instance from another instance.

Data Copied with the Instance		
Activity Types	Applications	Business Rules
Capacity Categories	Collaboration / Helpdesk groups and their members	Company Settings
Daily Extract, BICS / DbaaS Configuration	Dashboards (both Reports and Dashboards)	Display
Filters	Forms and Plugins	Geocoding Configuration
Glossary	Holidays	Inventory Types
Link Templates	Login Policies	Message Scenarios
Oracle Knowledge	Organizations	Properties
Quota (configuration settings)	Resources	Resource Types
Resource Settings	Routing Settings	Time Slots
Themes	User and User Types	Work Schedules
Work Skills	Work Skill Conditions	Work Zones
Work Zone Layers		

In addition to the above configuration elements, the following data is copied when you select the **Recreate From Another Instance** option with **data for future** or **data for future and 7 days from the past** option:

- Activities
- Inventory
- Quota (quota values)
- Statistics Parameters (both the parameters, estimated activity, and travel durations)
- Service requests
- Parts catalog

Note: Customer information including phone numbers, emails, and so on are copied while copying the data. So, be very careful if message scenarios use this information and contact customers accidentally from your TEST instances that are copied from Production or other TEST instances. For Statistics, only the durations are copied not the raw, reported data. In addition, the process that calculates statistics is not run in non-production instances (that is, TEST). This means any started and completed activities are not used to create statistics in a non-production instance.

If you have integrated an external application using Oracle Integration, the application is copied over to the target instance. However, you must reactivate the target instance in Oracle Integration to restart the data flow.


This data won't be copied for any type of operation:

Data that is Not Copied		
Certificates (uploaded for SAML & Open ID login policies and Applications)	Collaboration chats	Daily extract archives
BICS / DBaaS / OAC real time data	GPS tracks / positions	Files (images, file attachments, signatures, and user avatars)
History (activity, resource, and inventory)	Logs	Messages
Plug-ins credentials (credentials should be manually re-configured)	Work zone shapes	Subscriptions (event subscriptions)

Re-creating Instance Operation Incomplete

In general, it could take up to twenty-four (24) hours after your request to complete the re-create instance operation.

However, if the operation can't be completed within twenty-four hours of the request, it will be skipped and you'll have to create a new request. You'll notice a message displayed on the main screen of Service console if the operation is not completed within the time.

 **Recreate was not completed**
Instance recreation was not completed within 24 hours of the request and has been automatically skipped. Please try to recreate your instance again.

Data Management on Target Instance

This section describes how the data is treated on the target instance, when you re-create an instance.

Delivery Channels: Message Scenarios and Applications

The Delivery channels end points are preserved on the target instance at the beginning of re-create instance operation and restored upon completion of the operation. The system restores end points only for delivery channels that match between source and target instance (for example, same delivery channels on Production and Test).

For the delivery channels that don't match end point, they'll be deleted and you have to configure them again.

Applications

If you have not configured any application on the target environment, all the applications are copied from the source environment and created as inactive on the target environment. If you have configured applications on the target environment, the applications from the source are still copied, but the Client Secret is not copied. You will have to regenerate the Client ID and Client Secrets in the copy and configure the end points manually to enable communications.

Data Deletion

Once the operation is completed, all the data present on the target instance is deleted permanently without the possibility to restore it.

Revision History

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

Date	What's Changed	Notes
February 2022	Minor updates	

