Field Service

Using Cloud Console

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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

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

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

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we're working to remove insensitive terms from our products and documentation. We're also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Contacting Oracle

Access to Oracle Support

Customers can access electronic support through Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides. Please take one of the following surveys:

- For web-based user guide, *Web-based User Guide Survey*
- For tutorial feedback, *Tutorial Survey*

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1 Introduction

Oracle Cloud Console

Oracle Cloud Console (Cloud Console) provides information about the services for which you have an active subscription.

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

Cloud Console is the centralized access point where you manage your Oracle Cloud deployments and instances. Cloud Console provides options for both monitoring and operating your services. **My Applications** displays information such as active, expired, and pending services about all the Oracle SaaS applications you have licensed. You can use Cloud Console to monitor and operate all active services within a single identity domain. You can monitor the status of services for an entire account, across multiple data centers and identity domains. You use **Service Console** to perform all operating tasks after your services are activated.

Field Service and Cloud Console

In this document, you can find the information that is specific to Oracle Field Service settings within Oracle Cloud Console (Cloud Console).

Oracle Field Service is available in Cloud Console only if you have completed these activities:

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

> **Note:** To administrate your instance, you must create at least one admin user. For more information on how to create an admin user, see *Reset an Admin User*.

Contact *My Oracle Support* for any issues.

How do I add a new user to the Cloud Account?

After you sign in to your Cloud Account, you can see the Oracle Field Service application that you've purchased. You must create a user within the Oracle Field Service application in Oracle Cloud Console (Cloud Console) who can work with the Service Console.

1. Sign in to Cloud Console.
2. Click **Applications**.
3. Click **Quick Actions** > **Add a user to your tenancy**.
4. Click **Create user** and complete these fields on the **Create user** page:
     a. Type the first and last names of the user in the respective fields.
     b. If you want the email address of the user to be the user name to access Cloud Console, add it in the **Username/Email** field. Then, select **Use the email address as the username**.
     c. If you want the user name to be different from the email address, type a unique user name in the **Username/Email** field. Then, deselect **Use the email address as the username**. Type the email address in the **Email** field.
     d. If you want to provide administrative privileges to the user, select **Assign cloud account administrator role**.
     e. In the Groups section, select the user group to which you want to assign the user.
     f. Click **Create**.
5. After the user is added, click **Identity** > **Domains** > **Default Domain**.
6. Click **Oracle Cloud Services** > **FIELDSERVICETOA**.
7. Click **Application Roles**.
8. In the OFSC_APP_ADMINISTRATOR row, click the arrow and expand the row.
9. Click **Manage** next to **Assigned users**.
10. Click **Show available users** and select user that you added in Step 4.
11. Click **Assign**.
    The selected Oracle Cloud Services user is assigned to work with the Service Console of Oracle Field Service.

2 **Service Console**

About the 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

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How can I 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.
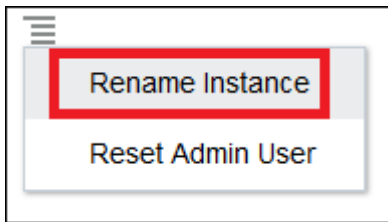
4. Enter a valid name for your instance and click **Rename**.
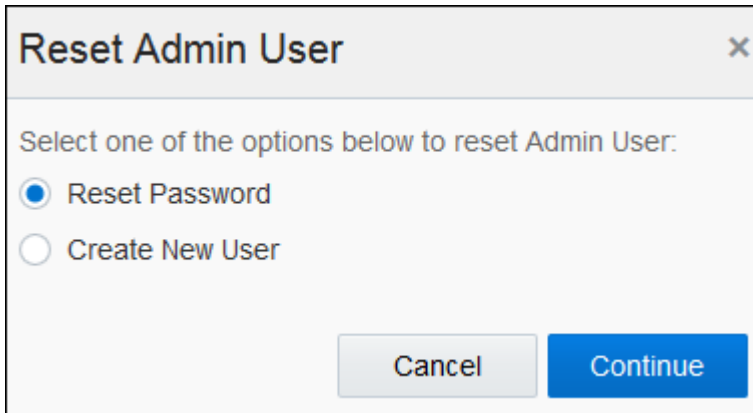
   > **Note:** A valid instance name can have numbers (0-9), lowercase letters (a-z), and dashes (-). The instance name must start and end with an alphanumeric number.

Reset an Admin User

Your Oracle Cloud Console (Cloud Console) login credentials are not the same as your Oracle Field Service login credentials. For security purposes, your Oracle Field Service environment is provisioned without users. Therefore, you must 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. Login to Oracle Field Service Service Console with your credentials.

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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.
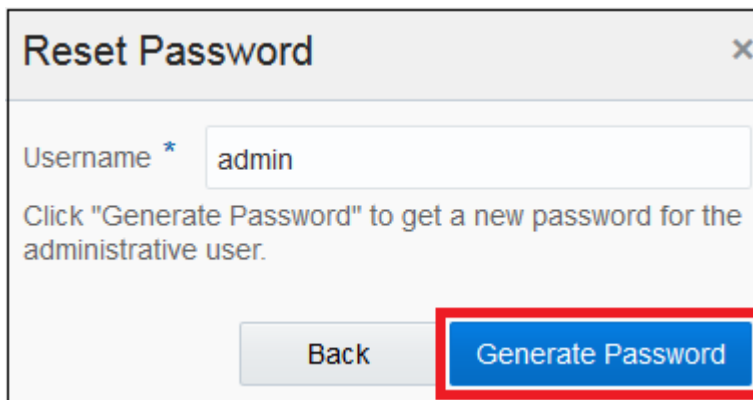
3. Select **Reset Password** and click **Continue**.

4. Enter the admin username in the **Username** field.

5. Click **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.

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

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3 Update Date Selection in Oracle Cloud 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 scheduling the update makes the process much simpler and transparent.

Oracle Field Service Update Process Rules

Here are 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 Oracle Cloud Console (Cloud Console).

- A Production instance receives the same Update and Service Update that is running on a Test Preview instance. However, if your Test Preview instance is running an older Major Update version, the instance you are trying to upgrade receives the latest Service Update available for the intended Major Update version. For example, a Test Preview instance is running 22B. The latest update available is 22C SU1. If you schedule 22C for the Production instance, it receives 22C SU1.

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- 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.

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. The details you can view include the requested operations, requestor, and request time.

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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 Oracle Cloud Console (Cloud Console) 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 Console account.

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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:

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

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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) ✕

Instance name o⬛⬛⬛⬛⬛⬛5

Version 21C

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

Choose Service Update

21C Service Update 3 (from o⬛⬛⬛⬛⬛⬛8) ▼

21C Service Update 6 (most recent)

21C Service Update 3 (from o⬛⬛⬛⬛⬛⬛)

21C Service Update 2 (from o⬛⬛⬛⬛⬛⬛l and others)

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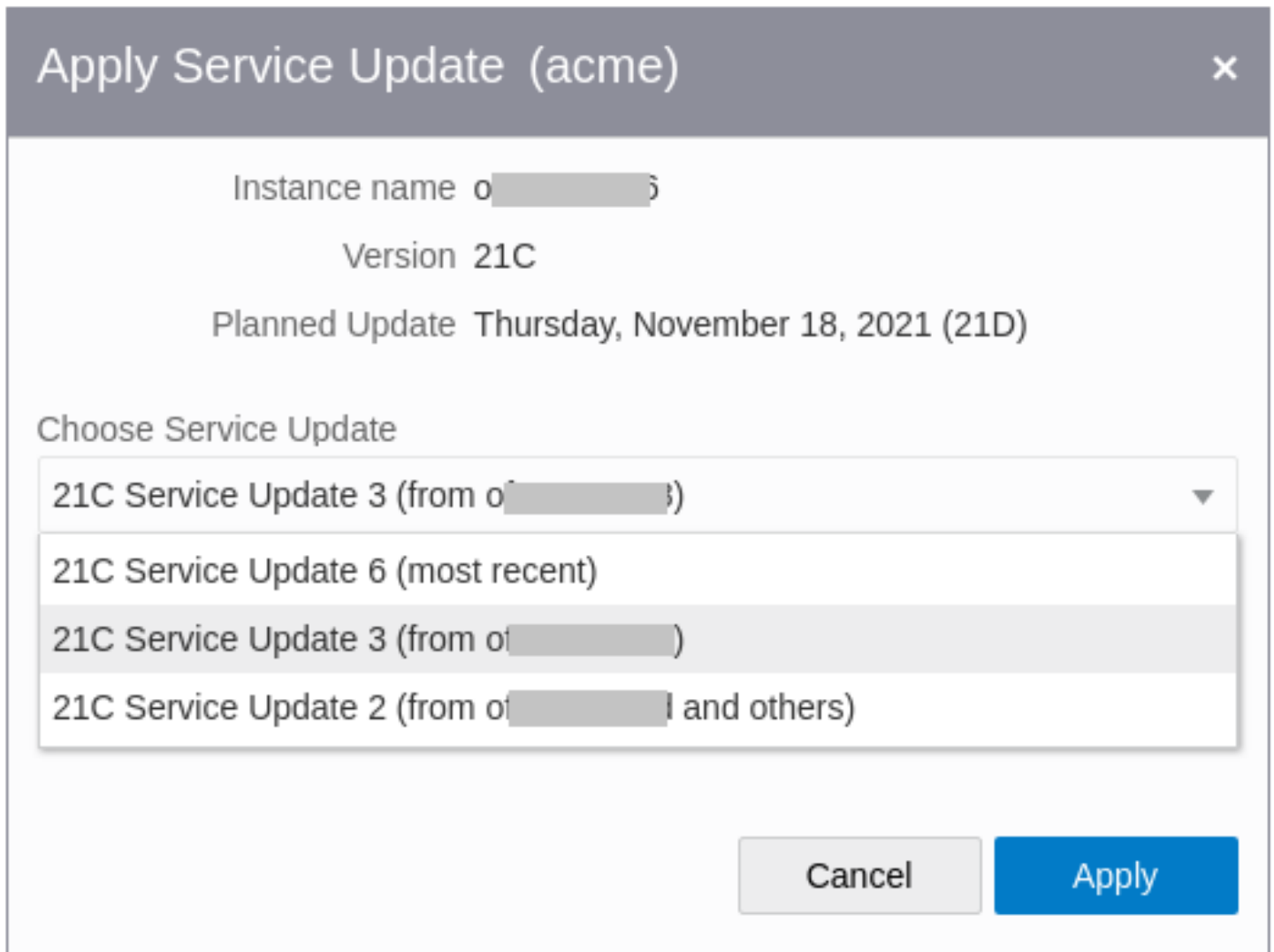
4. Select one of these options under **When to apply Service Update**:

   ○ **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.

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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.

4 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:
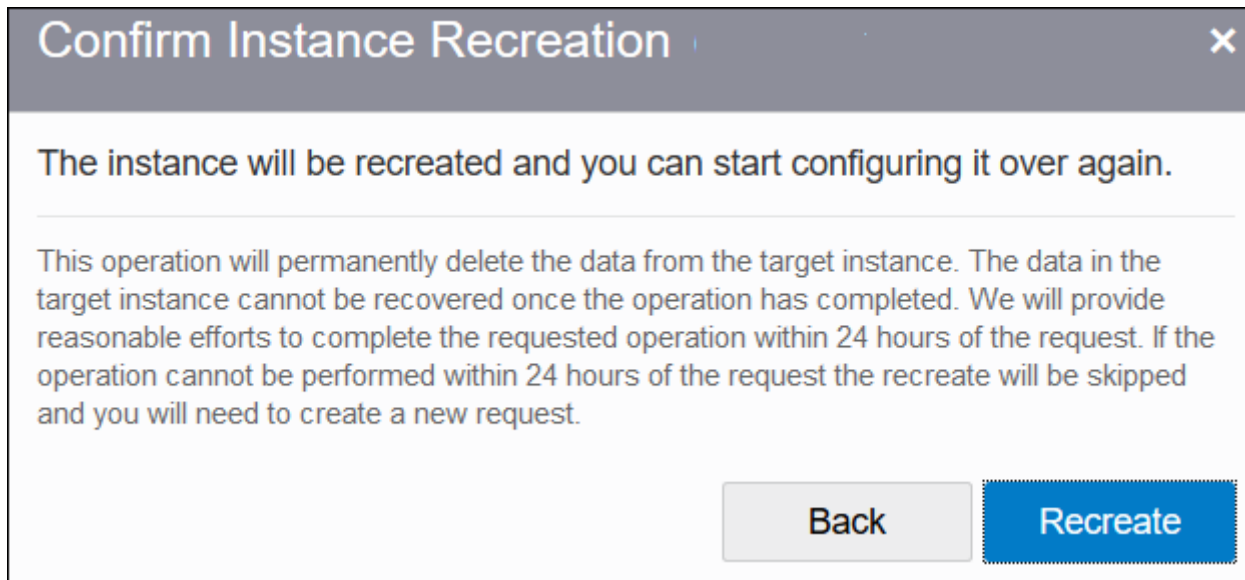
Re-Create from Another Instance

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

1. Open the Service Console.

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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	Select the type of data you want to copy over to the new instance. The options are: ○ Configuration ○ Configuration and data for future ○ Configuration, data for future, and 7 days from the past You can select the **Configuration** option only when you re-create a production instance. 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.
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 –

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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 (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, you need to 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

Typically, 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

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Delivery Channels : Message Scenarios and Outbound Integration

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 application restores the end points only for delivery channels for which the source and target instances match (for example, same delivery channels on Production and Test).

The delivery channels that don't match an end point are deleted and you have to configure them again.

Applications

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

After 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
May 2022	Initial release	

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