Oracle Utilities Mobile Workforce Management

Mobile Application User's Guide

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About the Mobile Application

Getting Started

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About the Mobile Application

The Oracle Utilities Mobile Workforce Management mobile application supports crew members as they perform work in the field.

Users log on to the application from their mobile device, also referred to as a mobile data terminal (MDT), which may be a laptop or a hand-held device. Once logged on to the application, they start their shift and receive the tasks assigned to them. Your system's configuration determines whether the crew receives all tasks at once or is drip-fed tasks throughout the day.

Tasks appear on the Open Task List on the crew's MDT. Once the crew has received its tasks, it can work them offline if connectivity is not available.

As the crew works each task, it can record its progress. For example, the crew can indicate when it begins traveling to the task location, when it arrives, and when it has completed work.

If the crew is connected, these updates are sent to the server immediately and can be viewed by the dispatcher and other authorized users. These updates are also sent to the scheduler so it can update and optimize the schedule based on the crew's current state and location.

If the crew is not connected, the details are sent when a connection is reestablished. Once a task is completed, it is removed from the Open Task List and appears on the Completed Task List, along with other finalized tasks.

Meetings (referred to as crew-related periods of unavailability or POUs) and breaks are considered tasks. A crew can take or cancel a break. Likewise, it can attend or not attend a meeting. The system can also track a crew's travel to and attendance at a meeting, just as it tracks their progress on a work task.

Related Topics:

About the Crew Leader

About the Crew Leader

The user who logs on to start a shift or the last user to change the shift's allocation is considered the crew leader.

The crew leader is responsible for modifying shift details (including crew allocation), updating the status of a task, entering completion details, and ending the shift.

The system provides security measures to ensure that only one device at a time can have the shift data. When a crew logs on to a shift, the system links both the MDT and the user ID to that shift. The system will allow any member of the crew to log on to the shift from this MDT, but will only allow the crew leader to log on from a different device.

If an MDT device breaks or is lost during a shift, the dispatcher can forcibly log the crew leader off the shift. The crew leader can then log in from another device and request shift details from the server.

If a device dies and the crew leader is unavailable to log back on, then a user with administrative privileges must revoke the crew leader's password and create a new one, then communicate the new password to another crew member so they can log in from a different device.

Related Topics:

About the Mobile Application

Starting Your Shift (Shift Logon)

Logging On to the Mobile Application

Registering a New Device

Getting Started

This section describes how to start the mobile application, register a mobile device the first time it is used to log in to the application, and log on to start a shift.

Registering a New Device

Use this to register a mobile device on the mobile application. This is required the first time you log on to the mobile application from a new device. Once the device is registered, you will be able to log on to the mobile application from the device without further prompting.

Prerequisites: The device you are registering must have been defined on the server. You must know the MDT's unique device tag, which was assigned when the MDT record was created on the server, and the URL of the server application.

1. From your mobile device, click the desktop icon or program menu option to start the mobile application.
2. On the MDT Registration screen, enter the MDT Tag.
3. Enter the URL for the sever application.
4. Click **Submit**.

If you would like to log on at this time, click the **Logon** button. See Logging On to the Mobile Application or more information about the logon process.

Related Topics:

Getting Started

Starting Your Shift (Shift Logon)

Logging On to the Mobile Application

About the Crew Leader

Logging On to the Mobile Application

Use this procedure to log on to the mobile application.

Prerequisites: The mobile application must have been installed and registered on your system, and you must have a valid user ID.

1. From your mobile device, click the desktop icon or program menu option to start the mobile application.
2. Enter your user ID and password.
3. Select a language, if prompted.
4. Click **OK**.

   The system authenticates your credentials and verifies that the status of the device is set to Active.

   If authenticated, the system looks for the most recent version of all active, qualified deployments based on the your user group, language, and MDT type.

   If only one deployment exists for your MDT's type, it is automatically downloaded. If your MDT type is associated with more than one deployment, the Select Deployment screen displays a list of available deployments. Select the deployment you want to use, and click Download.

   > **Note**: If unprocessed data exists on the device when you attempt to download a new deployment, the system warns that the unprocessed data will be deleted if you continue.

   When the download is complete, the system will look for the current shift associated with your user ID.

   If your shift has already been started, the system takes you directly to the Open Task List. Otherwise; the Shift Logon screen appears so you can start your shift. See Starting Your Shift (Shift Logon) for more information.

Related Topics:

Getting Started

Registering a New Device

About the Crew Leader

Starting Your Shift (Shift Logon)

Use this procedure to start a new shift. You can view shift details and make adjustments to the crew allocation and primary function before starting the shift.

Prerequisites: You must be connected to start your shift and retrieve the tasks you are scheduled to work. Once you have received your tasks, you can work the tasks while you are offline.

> **Note**: The user who starts the shift or was the last user to change its crew allocation is considered the crew leader. Once the shift is started, communication with the server regarding the shift and its tasks must be done using this user ID. See Related Topics for more information about the role of the crew leader.

1. From the Shift Logon screen, review the default shift details.
2. To change the primary function of the crew, select a different service class of work from the drop-down.
3. To change the mobile worker allocation, use the + or - buttons to add or remove mobile workers. Each mobile worker must have a valid system user ID.
4. To change the vehicle allocation, use the + or - buttons to add or remove vehicles. For each vehicle, enter the starting odometer reading if applicable.
5. When the shift details are correct, click **Start**.

> **Note**: If data for a non-finalized crew shift exists on the device you are using, the system warns that starting a new shift will cause the existing shift to be deleted. If you cancel the action, a member of the previous crew shift can log on and finalize the shift. If you continue, the previous shift's data will be deleted.

Once the shift has started, the system either dispatches all tasks at logon or drip-feeds them to you throughout the shift, depending on your system's configuration.

The tasks are displayed on the Open Tasks List in work sequence order. You can now begin working the first task. status of the shift is Out of Service until you start a task.

Related Topics:

Getting Started

Registering a New Device

Logging On to the Mobile Application

About the Crew Leader

About the Mobile Application Toolbar

The mobile application displays a toolbar below the application title bar. The toolbar is available from every application screen, but the buttons that are displayed at any time vary depending on the current application screen you are viewing.

Toolbar options are described below:

 Go to the Open Task List.

 Go to the Completed Task List.

 Go to the Actions Menu.

 Currently In Service. Click this to go out of service

 Currently Out of Service. Click this to go In Service.

 Go to the main task information screen.

 Go to the next task information screen.

 Go to the previous task information screen.

Related Topics:

Getting Started

Using the Task Lists

The mobile application displays two tasks lists: the Open Task List and the Completed Task List. From either list, you can select a task and view its details. You can update the status of open tasks, but completed tasks cannot be changed.

When you initially log on to start a shift, the system displays the Open Task List, which displays all unfinalized tasks. Click the task list icon (the left-most icon in the application toolbar) to display the Completed Task List, which displays all completed tasks. The task list icon works like a toggle; if you are viewing the Open Task List, clicking this icon displays the Completed Task List. If you are viewing the Completed Task List, clicking this icon displays the Open Task List.

Summary information about each task is displayed on the task list. This information varies, depending on the type of task. Click a task to display information and action buttons relevant to its current state. See Related Topics for more information about working tasks.

Icons are displayed to the left of certain tasks to provide visual cues. These icons may be customized during implementation. Standard icons display include the following:

 indicates emergency tasks

 indicates appointments

Related Topics:

Getting Started

Working Tasks

Managing your Shift

This section describes common tasks related to managing your shift.

Changing the Primary Function

Use this procedure to change the primary service class of work for your current crew shift.

Prerequisites: Connection to the server is not required to change primary function. However, it is recommended, as your primary function affects which tasks you will be assigned by the scheduler.

> **Note**: If you change the primary function during an active shift, one or more of the tasks previously assigned to the crew may no longer be appropriate. The system will automatically reschedule any such tasks that have not yet been dispatched. If a task has already been dispatched or queued for dispatch, the crew can suspend or postpone the task, or the dispatcher can manually reassign it to another crew (which will cause the task to be returned).

1. Click the **Actions** button on the application toolbar.
2. Select **Change Primary Function** on the Actions screen.
3. Select the service class of work that you want to use as the primary function for this crew shift.
4. Click **OK**.

Related Topics:

Managing your Shift

Changing the Crew Allocation

Use this procedure to change the mobile worker or vehicle allocation for your current crew shift.

Prerequisites: You must be connected in order to change the crew allocation.

If you change the crew allocation during an active shift, one or more of the tasks previously assigned to the crew may no longer be appropriate. The system will automatically reschedule any such tasks that have not yet been dispatched. If a task has already been dispatched or queued for dispatch, the crew can suspend or postpone the task, or the dispatcher can manually reassign it to another crew (which will cause the task to be returned).

1. Click the **Actions** button on the application toolbar.
2. Select **Change Crew Allocation** on the Actions screen.
3. Use the + or - buttons to add or remove mobile workers from this crew shift. You must enter a valid user id or employee id.
4. Use the + or - buttons to add or remove vehicles from the shift.

   When adding a vehicle, you must enter a valid vehicle ID. A starting odometer reading may also be required, based on your system's configuration. If a starting odometer value was entered, the system will require an ending odometer reading.
5. Click **OK**.

   The system will access the server to validate and update the shift details. If successful, the shift details are updated and you are returned to the Actions menu. Otherwise, the system presents you with an error, allowing you to correct the information.

Related Topics:

Managing your Shift

Going Out of Service

Use this to indicate that you are going out of service.

Prerequisites: Connection to the server is not required to go out of service. The system will automatically send the update message once you are back in range.

> **Note**: If you attempt to go out of service while a task is currently in progress, the system will prompt you to either Suspend or Postpone the current task first.

1. Click the **Out of Service** button on the application toolbar.
2. On the Go Out of Service screen, select a reason from the drop-down and enter the amount of time you think you will remain out of service.
3. Click **OK**.

   If a task is currently in progress, the system prompts you to suspend or postpone the action first (based on its current status), and then go out of service.

Related Topics:

Managing your Shift

Returning to Service

Use this to indicate that you are returning to service.

Prerequisites: Connection to the server is not required to return to service. The system will automatically send the update message once you are back in range.

1. Click the **In Service** button on the application toolbar.
2. On the Return to Service screen, click **OK**.

Related Topics:

Managing your Shift

Logging Off (Closing) the Application

You can close the mobile application at any time by clicking the 'x' in the upper right-hand corner of the application window. This effectively logs you off the application.

The system does not require you to complete your shift in order to log off the application. However, it warns you if unprocessed data exists.

> **Note**: If another crew starts a new shift on a device that contains unprocessed data, the previous shift's data will be deleted. Once a new shift is started on a device, you cannot access the previous shift.

When you log back in to the application, the system automatically logs you back on to your current shift.

Use the End of Shift function to complete your shift. See Related Topics for details.

Related Topics:

Managing your Shift

Ending (Completing) your Shift

Ending (Completing) your Shift

Use this to complete your shift and indicate that you are done working. You may be required to provide shift completion details, depending on your system's configuration.

Prerequisites: Connection to the server is not required to end your shift.

You can end a shift at any time. Any resources allocated to the shift are considered logged off from the shift, and any scheduled tasks that were not finalized are automatically returned. Returned activities are automatically rescheduled.

If you attempt end a shift while a task is currently in progress, the system will prompt you to either Suspend or Postpone the current task first.

3. Click the **Actions** button on the application toolbar.
4. Click **End of Shift** on the Actions screen.
5. Enter shift completion details, which may vary depending on your system's configuration. For example, ending odometer readings are required if you have specified starting odometer readings.
6. Click **Complete**.

All shifts and task completion details are sent to the server, and you are logged off the mobile application. If you are currently out of range, the system attempts to resend the message automatically once you are back in range.

The system automatically sends shift completion information to the server. Any unfinalized tasks are returned and rescheduled.

Related Topics:

Managing your Shift

Logging Off (Closing) the Application

Working Tasks

This topic describes procedures related to working with activities, breaks, and periods of unavailability (POUs).

Displaying Task Details

Use this to display detailed information about any task listed in the task list.

Prerequisites: Connection to the server is not required to view details of tasks that were already dispatched to you.

1. Click the task in the task list.

   For POUs, the system displays the POU details and action buttons for updating the POU status or cancelling the POU if you are not going to attend the event.

   For breaks, the system displays the break details and action buttons for starting, cancelling, or completing the break, depending on its current status.

   For activities, the screen that appears next depends on the status of the selected task (and also your system's configuration, as these screens can be customized). For example, if you are en route to the selected task, you will see the Enroute Assignment screen. If you are on site to the task, you will see the Assignment Maintenance screen.

2. Click the link for the type of activity information you want to view. Below is a list of common activity information. Your system may support additional information.

   A blank checkbox appears to the left of a link if the associated screen allows data to be entered and that screen has not yet been visited (viewed). The box appears checked if the screen has been visited, whether or not data has actually been entered.

   - **Activity Information** includes basic summary information plus the host ID and any comments associated with the activity.
   - **Customer Information** includes the customer name and contact information.
   - **Scheduling Information** includes the sequence of this activity within the crew shift's schedule and displays either calculated or actual values (depending on the task's status) for arrival time, completion time, travel time and distance.
   - **Common Completion** allows you to enter common completion data, which typically include standard completion remarks and free-form comments.

3. Use the right and left arrows on application toolbar to navigate to the next or previous information screen. Use the up arrow to navigate to the main activity screen where all available links are listed.

Related Topics:

Working Tasks

Going En Route to a Task

Use this procedure to indicate that you are travelling to the activity or POU location.

Prerequisites: Connection to the server is not required to update a task's status to En Route.

1. Click the task in the Open Task List.
2. Click **En Route**.

   The system displays the task address and updates the available actions based on the new status.

Related Topics:

Working Tasks

Going On Site to a Task

Use this procedure to indicate that you have arrived on site to the activity or POU.

Prerequisites: Connection to the server is not required to update a task's status to On Site.

1. If the En Route screen is not already displayed, click the task in the task list.
2. Click **On Site**.

   The system displays the maintenance screen for this activity, with links to activity information and buttons for available actions.

Related Topics:

Working Tasks

Completing an Activity

Use this procedure to indicate that you are done working on the activity and have entered all required completion information.

Prerequisites: Connection to the server is not required to complete a task.

1. If the activity maintenance screen is not already displayed, click the task in the Open Task List.
2. If you have not already done so, enter the completion details now:

- Click the link for each section that allows data to be entered. (Editable sections display a blank checkbox).
- Provide the requested information.
- Use the arrow buttons on the toolbar to navigate back to the main information screen.

3. Click **Complete**.

The task is removed from the Open Tasks List and will remain on the Completed Tasks List until you end the shift.

Related Topics:

Working Tasks

Postponing an Activity

Use this to procedure to postpone an activity that you have not yet arrived to.

Prerequisites: Connection to the server is not required to postpone a task.

> **Note**: You can only postpone an activity if its status is Dispatched or En Route. If you are already on site to a task, you must suspend rather than postpone it.

1. From the Open Task List, click the activity you want to postpone. (If you are en route to the activity and the Enroute screen is already displayed, skip to the next step.)
2. Click **Postpone**.
3. Enter the time to which you want to postpone the task and a reason for the postponement.The time must be in the future. The reason is optional.
4. Click **Ok**.

The task remains in the Open Tasks list. When you are ready to work the activity, set its status to **En Route**.

Related Topics:

Working Tasks

Suspending an Activity

Suspending an Activity

Use this to procedure to suspend an activity after arriving on site.

Prerequisites: Connection to the server is not required to postpone a task.

> **Note**: If you are not yet on site to a task, you must postpone rather than suspend it.

1. Click the task in the task list.
2. Click **Suspend**.
3. Enter the time to which you want to postpone the task and a reason for the postponement. The time must be in the future. The reason is optional.
4. Enter the amount of time you think it will take to complete the task when you resume.
5. Click **OK**.

When you are ready to resume working on this task, set its status to **En Route**.

Related Topics:

Working Tasks

Postponing an Activity

Starting and Completing Breaks

Use this procedure to start or complete a break that appears on your task list. If you decide not to take a break, use the Cancel action.

Prerequisites: Connection to the server is not required to start or complete a break.

> **Note**: When you start a break, the shift status automatically changes to Out of Service. When you complete a break, the shift returns to In Service status.

1. From the Open Tasks list, click the break you want to start or complete.

   The system displays break details and buttons for available actions.

2. Click the appropriate button to start or complete the activity.

Related Topics:

Working Tasks

Cancelling a Break or POU

If you decide not to take a break or attend a POU, use this procedure to cancel it. Cancelling a task finalizes it and removes it from the Open Tasks list.

Prerequisites: Connection to the server is not required to cancel a break or POU.

1. From the Open Tasks List, click the break or POU you want to cancel.
2. Click **Cancel**.

The task is moved to the Completed Tasks list. You can start work on your next task.

Related Topics:

Working Tasks

Creating a Field-Referenced Activity (FRA)

Use this to create an activity on the MDT if the original activity cannot be dispatched due to connectivity problems.

Prerequisites: The dispatcher should communicate the activity's details over the phone or radio, and should also give you a short ID to use when you create the activity. This ID is required so that the system can match the field-referenced activity back to the original activity when connectivity is restored.

1. Click the Actions button on the application toolbar.
2. Select Add Field Referenced Activity from the Actions Menu screen.
3. Select the activity type from the drop-down. The activity type determines the type of completion information you will be able to enter, so be sure to select the correct type.
4. Enter the alternate ID provided to you by the dispatcher.
5. Enter the customer's address and city.
6. Click **OK**.

A new task is created and added to the top of the Open Tasks list. You can work this task just as you would any other dispatched task. When the system is able to reconnect to the server application, it will automatically match this activity to the original one on the server using the ID you specified.

Related Topics:

Working Tasks

Working Emergency Activities

Because of the nature of emergency activities, the system handles them differently from regular tasks.

When an emergency activity is dispatched to a crew, the mobile application displays an alert pop-up screen that prompts the crew to accept or reject the task.

- If the crew accepts the activity, an acknowledgement message is sent to the server. Only then is the emergency activity considered dispatched.
- If the crew rejects the activity, it is returned so it can be reassigned to a different crew. The system also issues an unacknowledged emergency alert to the dispatcher.
- If the crew does not respond in a timely manner or is out of range and the acknowledgement does not reach the server, the system issues an unacknowledged emergency alert to the dispatcher so that appropriate action can be taken.

Related Topics:

Working Tasks