

ORACLE FIELD SERVICE CLOUD CONFIGURATIONS

FOR

ORACLE WORK AND ASSET CLOUD SERVICE INTEGRATION TO ORACLE FIELD SERVICE CLOUD

(ALSO APPLICABLE TO ORACLE UTILITIES WORK
AND ASSET MANAGEMENT)

SETUP GUIDE

21A



Disclaimer

Oracle Field Service Cloud Configurations for Oracle Work and Asset Cloud Service Integration to Oracle Field Service Cloud, Setup Guide 21A

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Table of Contents

PREFACE	5
AUDIENCE	5
DOCUMENTATION AND ACCESSIBILITY	5
ABBREVIATIONS	5
CHAPTER 1: ACCELERATOR OVERVIEW	6
CONFIGURATION OVERVIEW	6
ACCELERATOR PACKAGE	6
ACCELERATOR ACTIVITY TYPES	6
CHAPTER 2: INSTALLING THE BASIC ACCELERATOR PACKAGE	7
ORDER OF IMPORTING THE PACKAGE	7
ACTIVITY TYPES	7
PROPERTIES	8
GLOSSARY	8
FORMS AND PLUGINS	9
CHAPTER 3: ADDITIONAL OFSC CONFIGURATIONS	21
SYNC MOBILE CONTROL DATA INFORMATION FROM WACS TO OFSC	21
ORGANIZATION	24
WORK ZONES	25
RESOURCE AND BUCKET INFO	26
OUTBOUND CHANNEL	27
CREW CONFIGURATION	28
OFFLINE VS ONLINE MODE	31
CREW TIME	31
INVENTORY TYPES	32
TIMESHEET/ OTHER DIRECT CHARGES FLAG	34
TIMEOUT SECONDS	35
CHECKLIST	36

CHAPTER 4: USER OPERATIONS

37

STARTING ACTIVITY	37
LOCKING ACTIVITY	38
ACTIVITY DETAILS	38
SERVICE HISTORIES	40
MEASUREMENTS	46
RESOURCE USAGE	47
ACTIVITY COMPLETION	50
ASSETS INSTALLS AND REMOVALS	51
PICK UP AND FOLLOW UP ORDERS	69
MOBILE INVENTORY MANAGEMENT	77

CHAPTER 5: CUSTOMIZATIONS

91

ADDING NEW FIELDS TO FIELD ACTIVITY	91
ADDING CUSTOM BUSINESS OBJECTS	94
PLUGINS RENDERING DATA	95
VALIDATION FOR COMPLETION	98

CHAPTER 6: HOSTING PLUG-INS IN OFSC

99

Preface

Welcome to the Oracle Field Service Cloud Setup Guide for Oracle Utilities Work and Asset Cloud Service Integration to Oracle Field Service Cloud 21A.

This document focuses on the Oracle Field Service Cloud configurations and administration information required for this integration. The preface includes the following:

- [Audience](#)
- [Documentation and Accessibility](#)
- [Abbreviations](#)

Audience

This document is intended for anyone implementing the Oracle Utilities Integration for Work and Asset Cloud Service and Oracle Field Service Cloud.

Documentation and Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support for the hearing impaired. Visit:

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or
<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs>

Abbreviations

Term	Expanded Form
OFSC	Oracle Field Service Cloud
WAM	Oracle Utilities Work and Asset Management
OIC	Oracle Integration Cloud Service
WACS	Oracle Utilities Work and Asset Cloud Service

Chapter 1: Accelerator Overview

This chapter focuses on the software requirements for Oracle Field Service Cloud and provides an overview of the configuration. It includes the following sections:

- [Configuration Overview](#)
- [Accelerator Package](#)
- [Accelerator Activity Types](#)

Configuration Overview

This section covers basic Oracle Field Service Cloud configurations, such as Activity Types, User Types, Properties, UI screens, validations for these UIs, plugins, and resource configurations.

Accelerator Package

The accelerator package includes various user types, properties, and plugins. This document explains the configurations for other elements such as activity types, work zones, work skills, work conditions and outbound channel.

The package helps customers to configure and set up Oracle Field Service Cloud to be used in the Oracle Utilities Work and Asset Cloud Service integration to Oracle Field Service Cloud as the package contains only Oracle Utilities Work and Asset Cloud Service and Oracle Integration Cloud configuration files and instructions. It is used in addition to the integration package that provides a complete end-to-end set up for the integration.

The contents of the package are:

- **User Types** – Define layouts and UI screens. Refer to the [User Types](#) section for more details.
- **Properties** – Create layouts and mapping. Refer to the [Properties](#) section for more information.
- **Plugins** – The plugins that are part of this integration are measurements, service history, planned service history, resource usage, assetComponentInstallExchangeUndo, pick up work, lock unlock, materials and validate completion. Refer to the [Forms and Plugins](#) section for more information.

Accelerator Activity Types

This accelerator is a sample and supports a few Activity Types in this release. More activity types can be added based on the requirement.

Chapter 2: Installing the Basic Accelerator Package

This chapter focuses on importing the files that come as a part of the package and configuring them in the Oracle Field Service Cloud environment for the integration to run successfully. Make sure to follow the same sequence for successful configuration.

- [Order of Importing the Package](#)
- [Activity Types](#)
- [Properties](#)
- [Glossary](#)
- [Forms and Plugins](#)
- [User Types](#)

Order of Importing the Package


Make sure to follow the order mentioned below during the package import.

- Properties
- Glossary
- Measurements Plugin
- ResourceUsage Plugin
- ServiceHistory Plugin
- ValidateCompletion Plugin
- PlannedServiceHistory Plugin
- Asset Component Install Exchange Undo Plugin
- Lock Unlock Activity Plugin
- Pick Up Work Plugin
- Materials Plugin
- WACS OFSC User Type
- WACS OFSC Dispatcher User Type

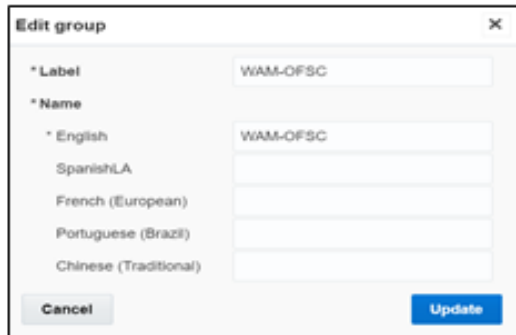
Activity Types

Activity types define the categories of the activity supported by Oracle Field Service Cloud (in this case, Oracle Utilities Work and Asset Cloud Service Integration to Oracle Field Service Cloud). Activity types are synced part of admin data from Oracle Utilities Work and Asset Cloud Service to Oracle Field Service Cloud. As a pre-requisite before running the Admin Sync, perform the following.

To create an Activity Type Group:

1. Login to Oracle Field Service Cloud with valid credentials.
2. Click the  icon on left of the Home screen.
3. Navigate to **Configuration > Resources, Activities, Inventories > Activity Types**.

4. Click **Add Group**.
5. Enter the “WAM-OFSC” group.



6. Click **Update**.

Properties

Properties enable the integration specific UIs created and map the Oracle Field Service Cloud UI element with a property. Each property is classified into types such as field, integer, enumeration, string on the basis of requirements and should be addressed using this property.

To import the property file included in the accelerator package:

1. On the **Configuration** page, select **Resources, Activities, Inventories > Properties**.
2. Click **Import**.
3. Browse to the location of the file to be imported and click **Import**.
4. Verify the successful import of the file. The **Successfully Imported** message with number of properties imported is displayed. Make sure the **Imported with warnings** and **Not imported** count is 0.

Glossary

Glossary is used for cosmetic changes in label names. This function provides the flexibility to change labels based on the business needs.

To use the glossary function:

1. On the **Configuration** page, click **Glossary** in the **Displays** section.
2. Click **Import** to import the file provided as part of the package.
3. Click **Browse** and select the file. Click **Import**.
Make sure the file imports successfully.
4. As part of the package, the following labels are changed. Change the labels based on the preference.

Example: To change the **Asset** label, change the Asset in the given file. You can add more values to the existing values.

Category (ctg)	Identifier (id)	Type (tp)	ID/Label (lbl)	User Types (ut)	English (en-US)
Glossary: mobile_shared, wap_inventory	glossary	translation	10109		Assets/Equipment
Glossary: mobile_shared	glossary	translation	10865		Assets/Equipment
Glossary: mobile_shared	glossary	translation	10767		Asset/Equipment Details
Glossary: wap_inventory	glossary	translation	10111		Existing
Glossary: mobile_shared, reports_gps_alerts, wap_inventory	glossary	translation	10114		Resource Inventory
Screen Configuration - Mobility: Edit/View activity	fae3e1febea180ba048eb3f1b0c011f029dfd5e	layout	list_inventories	C2M OFSC	Equipment
Screen Configuration - Mobility: Edit/View activity	9bdc924764e5ac57bfb15c4e166282c8a3189de	layout	list_inventories	WAM OFSC	Assets

Forms and Plugins

Plugins are used to make changes to screen and data, based on their type and status of target and parent object. They are also used to enter measurements, record time/materials/equipment used while completing an activity, populate service history information, install/replace/remove/attach/exchange of assets, using truck inventories and validate completion information before actually sending the information to verify if the message is accepted by Oracle Utilities Work and Asset Cloud Service.

Plug-ins in Oracle Field Service Cloud perform actions not found in the standard solution. They appear as selectable links on the application. They open a new window, tab, or frame in a browser where an external HTML5 application is executed.

For more information on Oracle Field Service Cloud plugin framework refer to latest Oracle Field Service Cloud documentation at:

<https://docs.oracle.com/en/cloud/saas/field-service/21a/fapcf/overview-of-the-plugin-api.html#overview-of-the-plugin-api>


Each plugin contains a JavaScript file that has the main business logic required for functionality of the plugin. The data required for each plugin is available through the properties that are added for the plugin. XML data obtained through properties is parsed and appropriate XSL is applied to it to render each UI.

Measurement Plugin

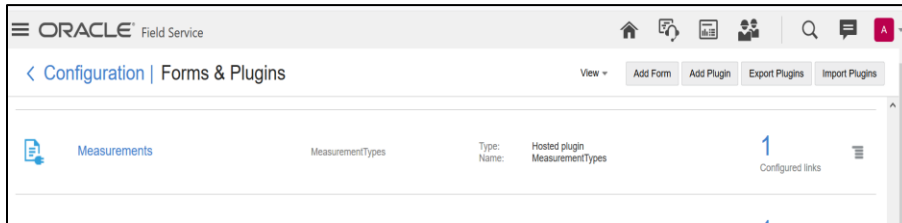
Measurements manage the asset operational and runtime data collected and tracked for assets. Asset measurements include mileage, hours of uptime, number of start-stops, and more.

Since they almost entirely depend on the usage of the related asset, readings cannot be calculated or predicted accurately by the system. Instead, readings must be collected and entered into the system, either manually by a user or imported as the result of activity completion.

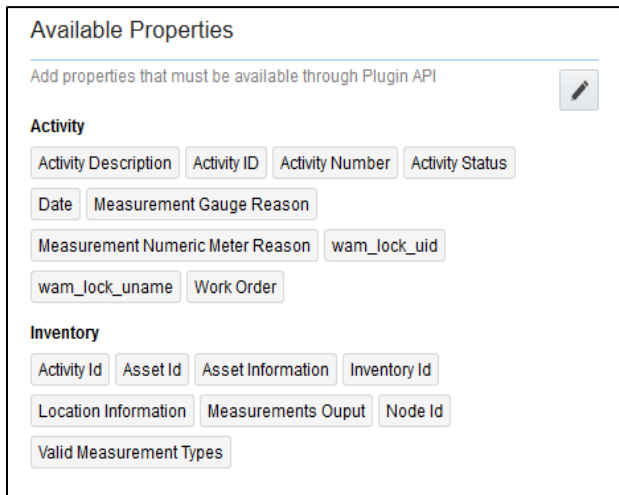
To import plugins:

1. Login to Oracle Field Service Cloud with valid credentials.
2. Click the  icon on left of the Home screen.
3. Navigate to **Configuration > Displays > Forms and Plugins**.
4. Click **Import Plugins**.

- On the **Choose file** field, click **Browse** to select measurement plugin. Click **Validate**.
Oracle Field Service Cloud validates the plugin and the number of valid items should be 1.
- Click **Import**. Ensure the “Number of valid items” is 1 and “Number of not valid items” is 0.
After the successful import of plugin, Oracle Field Service Cloud displays the details as shown below.



- Make sure the **Available Properties** tab is populated with all properties.



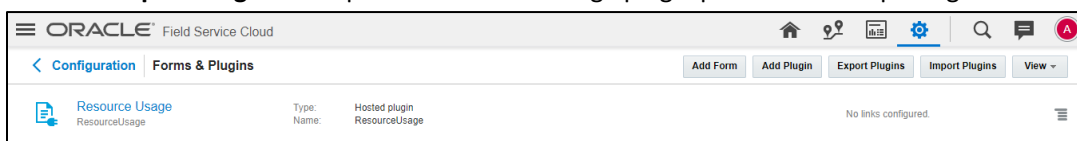
Resource Usage Plugin

Timesheets are used to record the amount of time that workers (labor resources) spend on activities or work orders. Once charges are entered, processing allows employees to receive proper compensation for their work and labor charges are applied to the appropriate cost buckets.

Generally, only each individual and the person is designated as the supervisor on that individual's crew can access timesheet information for that person.

To import the plugin:

- Repeat steps 1 to 5 from [Measurement Plugin](#).
- Click **Import Plugins** to import the resource usage plugin provided in the package.



3. Select the resource plugin and enter the details:

- oic_url: https://OIC_host:OIC_port/ic/api/integration/v1/flows/rest/OUTL-BA-OFSC_WACS_RES_USAGE_SEND/1.0/resourceUsage
- oic_undef/oic_password: OIC username/password


Oracle Field Service Cloud users should configure the following:

- ofsc_undef: clientID@instance ID
- ofsc_password: client secret key
- ofsc_siteAddress : instance ID
- ofsc_bucket: External ID of bucket configured in your environment

oic_url	Value	-
oic_undef	Value	-
oic_password	Value	-
ofsc_undef	Value	-
ofsc_password	Value	-
ofsc_bucket	Value	-
ofsc_siteAddress	Value	-
		+

4. Make sure the **Available Properties** tab is populated with properties shown below.

Available Properties

Add properties that must be available through Plugin API 

Activity

Activity Description Activity ID Activity Number Activity Status

Craft Crew Shift Type Date End Equipment Type Job Order

Labor Earning Type Other Resource Type Overtime Type

Resource Unit of Measure Resource Usage Flag SLA End

SLA Start Start Time Slot Timeout Traveling Time

WAM Resource Usage Output Work Order Work Skill

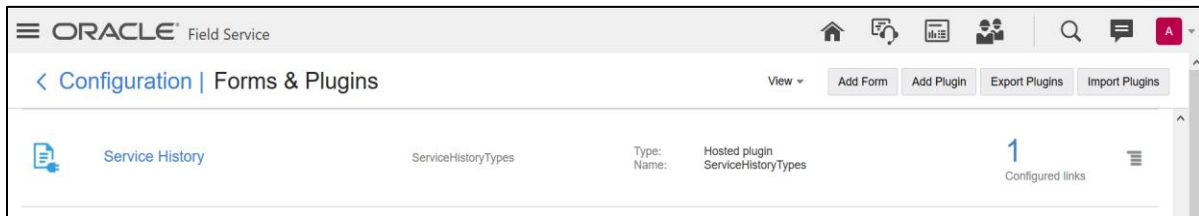
Resource

External ID Name Resource type Type

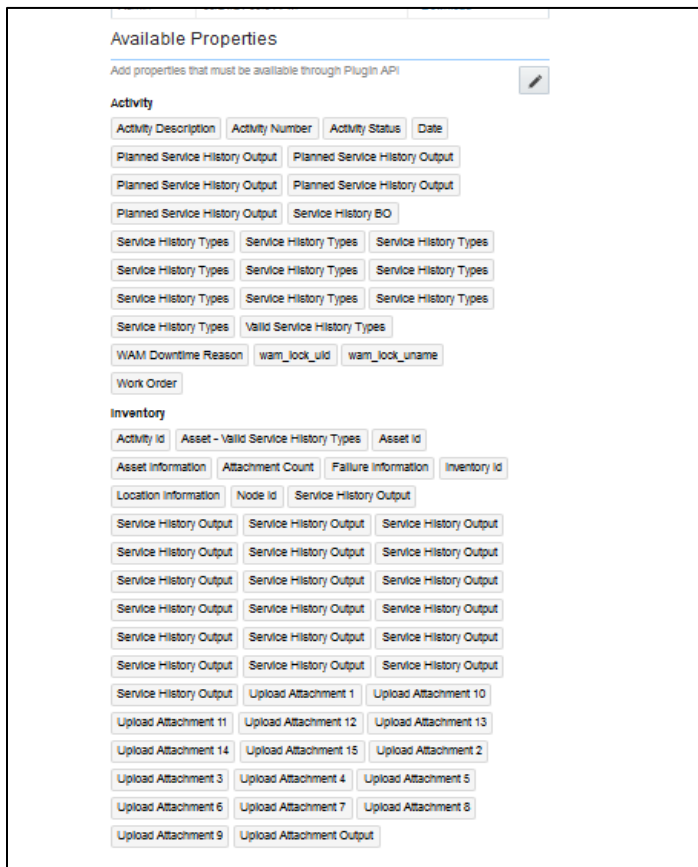
Service History Plugin

Service history is information about some type of service or maintenance performed on an asset. Information typically associated with service history include record inspection feedback, pass/fail details, downtime, parts failure information, maintenance or service logs, or other information regarding service on the asset.

1. Repeat steps 1 to 5 from [Measurement Plugin](#).
2. Click **Import Plugins** to import the service history plugin provided in the package.



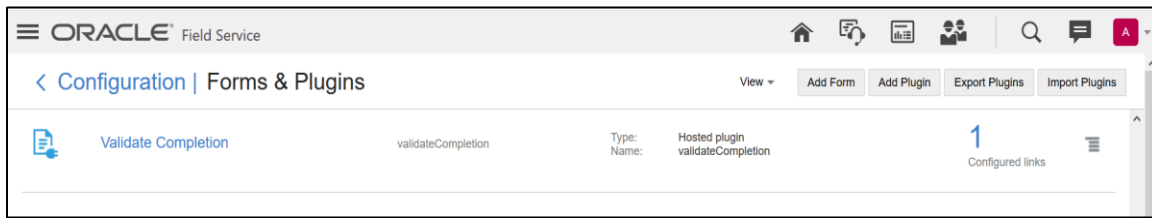
3. Make sure the **Available Properties** tab is populated with the properties shown below.



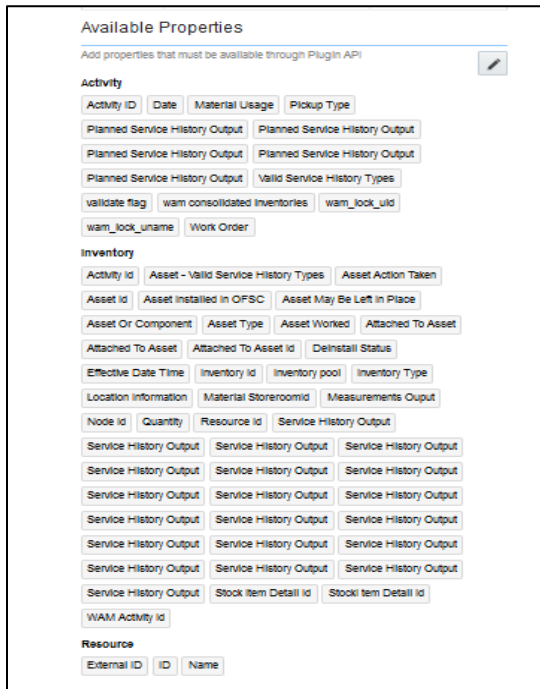
Validate Completion Plugin

This plugin helps crew to validate the eligibility to the activity to complete. If the activity is not yet eligible, the plugin displays corresponding error message if the eligibility is success crew navigates to end activity screen to complete the activity.

1. Repeat steps 1 to 5 from the [Measurement Plugin](#) section.
2. Click **Import Validate Completion Plugin** to import the validate completion plugin provided in the package.



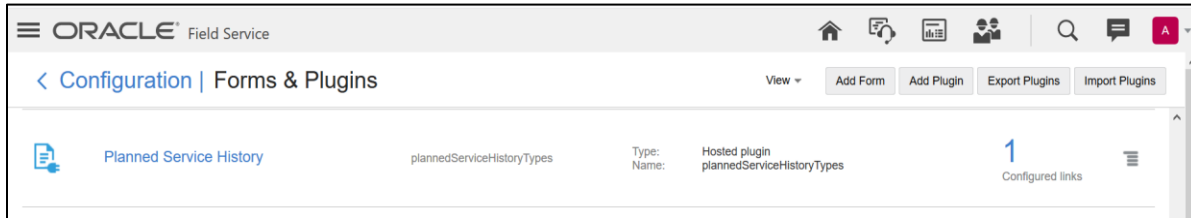
3. Make sure that the **Available Properties** tab is populated with the properties shown below.



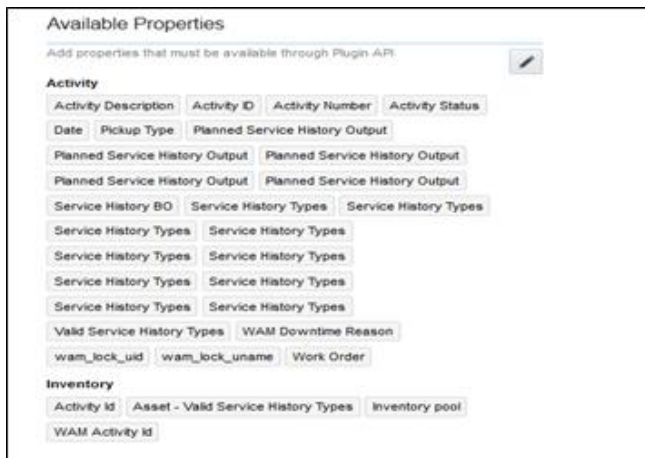
Planned Service History Plugin

Planned Service history is information regarding some type of service or maintenance performed on an asset. Information typically associated with service history include record inspection feedback, pass/fail details, downtime, parts failure information, maintenance or service logs, or other information regarding service on the asset.

1. Repeat steps 1 to 5 from the [Measurement Plugin](#) section.
2. Click **Import Plugins** to import the Planned Service History plugin provided in the package.



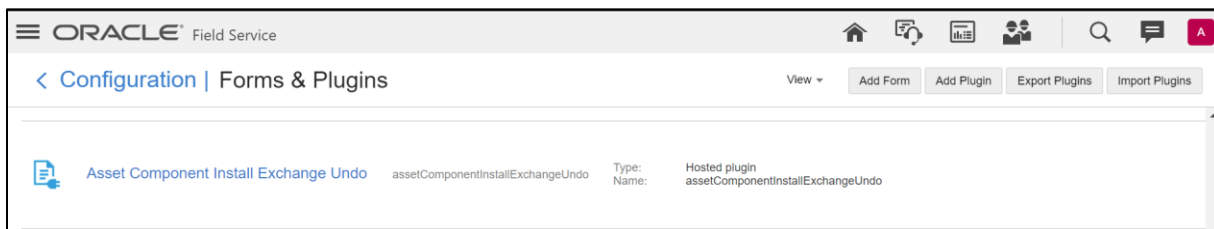
3. Make sure the **Available Properties** tab is populated with the properties shown below.



Asset Component Install Exchange Undo Plugin

Handle operations on Install, Uninstall and replace actions for the assets and components in a work activity. Information associated with the components used for the assets on completion of the activity is handled.

1. Repeat steps 1 to 5 from the [Measurement Plugin](#) section.
2. Click **Import Plugins** to import the Asset Component Install Exchange Undo plugin provided in the package.



3. Select the **Asset Component Install Exchange Undo** plugin and enter the details:
 - oic_url: https://OIC_host:OIC_port/ic/api/integration/v1/flows/rest/OUTL-BA-OFSC_WACS_ASSET_QUERY/1.0/assetQueryDetails
 - oic_uname/oic_password: OIC username/password
 - ofsc_multiDay_act_ibls: The Activity type of the Multi-Day activity created in OFSC. If there are more than one use '|' separator. Example: Act1|Act2|Act3

4. Make sure the **Available Properties** tab is populated with the properties shown below.

Available Properties

Add properties that must be available through Plugin API ✎

Activity

Activity Description Activity ID Activity Number Activity Type

Service History Types Service History Types Service History Types

Service History Types Service History Types Service History Types

Service History Types Service History Types Service History Types

Service History Types Work Order

Inventory

Activity Id Asset - Valid Service History Types Asset Action Taken

Asset Description Asset Id Asset Information

Asset installed in OFSC Asset May Be Left in Place

Asset Or Component Asset Sequence Asset Type Asset Worked

Attach To Asset Attached To Asset Attached To Asset Id

Badge Number Building Deinstall Status Effective Date Time

Exchanged Inventory Id Failure Information Inventory Id Inventory pool

Inventory Type Is Asset Location Item Number Location Information

Node Id Point ID Room Run To Failure Serial Number

Service Area Site Location Valid Measurement Types

WAM Activity Id

Resource

ID


Lock Unlock Activity Plugin

Handle operations lock or unlocking of an activity for a crew so that he can work on it.

1. Repeat steps 1 to 5 from the [Measurement Plugin](#) section.

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< Configuration | Forms & Plugins View ▾ Add Form Add Plugin Export Plugins Import Plugins

	Lock Unlock Activity	lockUnlockActivity	Type: HTML5 application URL: https://slc11axf.us.oracle.com:8843/Plugins/QA/WAM-OFSC/LockUnlock/index.html
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2. Click **Import Plugins** to import the Lock Unlock Activity Plugin provided in the package.

Available Properties

Add properties that must be available through Plugin API ✎

Activity

Activity ID

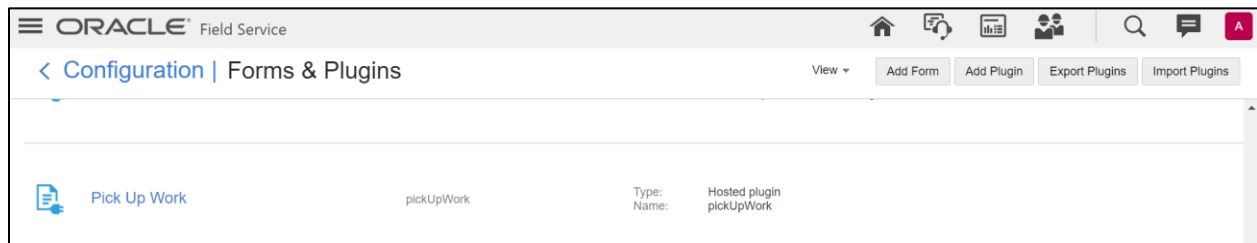
Resource

External ID

Pick Up Work Plugin

This plugin helps the crew to create Work order, Work request of types Asset related or non-Asset related from OFSC application itself. It can be a follow up to existing activity or a new work which is unrelated pickup.

1. Repeat steps 1 to 5 from the [Measurement Plugin](#) section.



2. Select the **Pick Up Work** plugin and enter the following details:
 - oic_url: https://OIC_host:OIC_port/ic/api/integration/v1/flows/rest/OUTL-BA-OFSC_WACS_ASSET_QUERY/1.0/assetQuery
 - oic_url1 : https://OIC_host:OIC_port/ic/api/integration/v1/flows/rest/OUTL-BA-OFSC_WACS_ASSET_QUERY/1.0/assetQueryDetailsPickup
 - oic_uname/oic_password: OIC username/password
 - ofsc_uname: clientID@instance ID
 - ofsc_password: client secret key
 - ofsc_siteAddress : instance ID
 - groupLabel : OFSC group label
 - bucket_for_nonScheduled : External ID of the bucket

ofsc_uname	Value	...	—
ofsc_password	Value	...	—
ofsc_siteAddress	Value	...	—
groupLabel	Value	...	—
oic_url	Value	...	—
oic_uname	Value	...	—
oic_password	Value	...	—
oic_url1	Value	...	—
bucket_for_nonSche	Value	...	—

3. Click **Import Plugins** to import the Pick Up Work Plugin provided in the package.

Available Properties

Add properties that must be available through Plugin API

Activity

Activity Description | Activity ID | Activity Location Information

Activity Long Description | Activity Number | Activity Type

Activity Type Description | Activity Type To PSH | Pickup Asset Details

Pickup Asset Id | Pickup Asset Node Id | Pickup Downtime Date Time

Pickup Emergency | Pickup Guid | Pickup Location Type

Pickup Related Activity Information | Pickup Related Appointment Number

Pickup Related Location Information

Pickup Related Work Order Description | Pickup Type

Pickup Work Category | Pickup work class

Pickup Work Class Description | Pickup Work It | Pickup Work Priority

Pickup Work Type | Required By Date | Service History Types

Service History Types | Service History Types | Service History Types

Service History Types | Service History Types | Service History Types

Service History Types | Service History Types | Service History Types

Timeout | Valid Service History Types | Work Order

Work Order Description

Inventory

Activity Id | Asset - Valid Service History Types | Asset Action Taken

Asset Description | Asset Id | Asset Information

Asset Installed in OFSC | Asset May Be Left in Place

Asset Or Component | Asset Sequence | Asset Type | Asset Worked

Attach To Asset | Attached To Asset | Attached To Asset

Attached To Asset Id | Badge Number | Building | Effective Date Time

Failure Information | Inventory Id | Inventory pool | Inventory Type

Is Asset Location | Item Number | Location Information | Node Id

Point ID | Room | Run To Failure | Serial Number | Service Area

Site Location | Valid Measurement Types

Resource

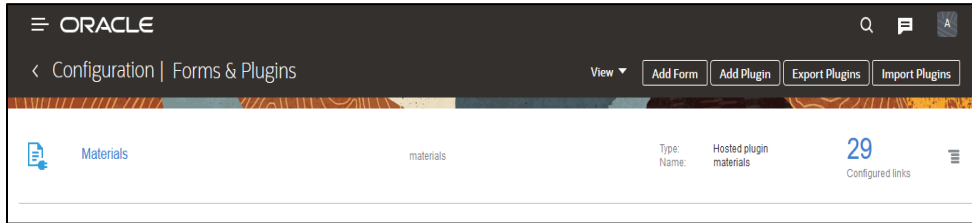
External ID | ID

Materials Plugin

This plugin handles the operations related to mobile storerooms in Oracle Field Service Cloud including reporting the use of materials. The operations includes Use/Undo Use Item, Install/Undo Install Asset, and Attach/Undo Attach component from truck inventories. Oracle Field Service Cloud can request an update of a mobile storeroom passing date/time of the last snapshot.

To import plugin:

1. Repeat steps 1 to 5 from the [Measurement Plugin](#) section.
2. After the successful import of plugin, Oracle Field Service Cloud displays the details as shown below.



3. Select the **Materials** plugin and enter the details:
 - oic_storeroom_sync_url: https://OIC_host:OIC_port/ic/api/integration/v1/flows/rest/OUTL-BA-OFSC_WACS_STOREROOM_SYNC/1.0/syncStoreroom
 - oic_uname/oic_password: OIC username/password
 - oic_assetQueryDetails_url: https://OIC_host:OIC_port/ic/api/integration/v1/flows/rest/OUTL-BA-OFSC_WACS_ASSET_QUERY/1.0/assetQueryDetails
 - oic_activityUpdate_url: https://OIC_host:OIC_port/ic/api/integration/v1/flows/rest/OUTL-BA-OFSC_WACS_ACTV_UPDT_PULL/1.0/retrieveUpdates

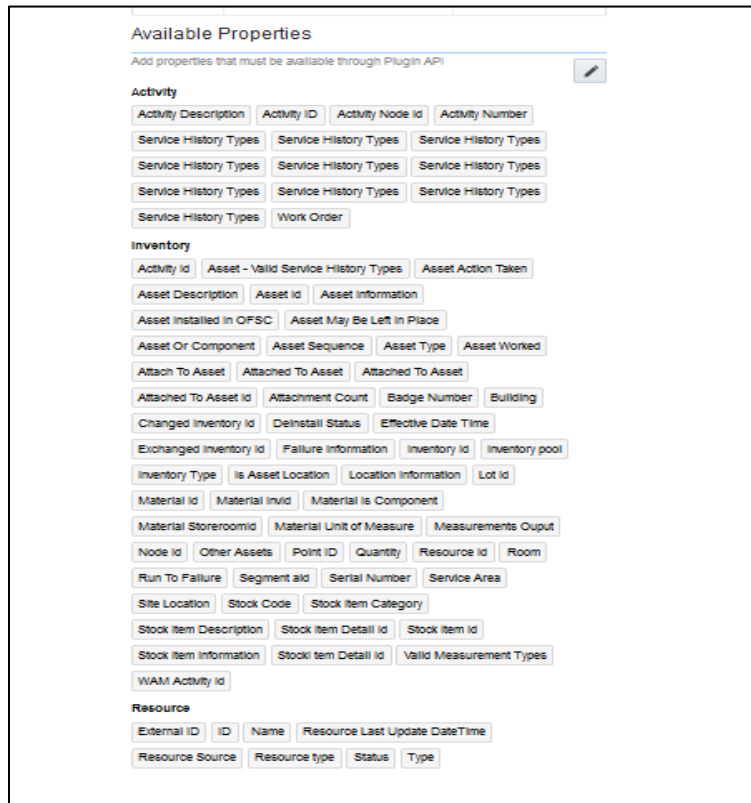
Oracle Field Service Cloud users should to configure the following:

- ofsc_uname: clientID@instance ID
- ofsc_password: client secret key
- ofsc_siteAddress: instance ID

Duplicate names are not allowed. Overall size should not exceed 5 KB.

oic_storeroom_sync_	Value	...	-
oic_uname	Value	...	-
oic_password	Value	...	-
ofsc_uname	Value	...	-
ofsc_password	Value	...	-
ofsc_siteAddress	Value	...	-
oic_assetQueryDetail	Value	...	-
oic_activityUpdate_ur	Value	...	-
			+

4. Make sure the **Available Properties** tab is populated with all properties.



User Types

The user types are used to manage permissions for all the users. Each user type has a profile that defines security and display permissions, such as the user's login method, the ability to use certain functions, and access to menu items and properties. Screen-configuration settings define the screens, windows, pop-up windows and other elements visible to a certain user type. They also support the context layout editor, in which the content, arrangement, and visibilities of each context are set.


Use the user types to create custom screen context layouts for Oracle Work and Asset Cloud Service integration to Oracle Field Service Cloud for utilities by accessing the screen configuration settings in specific user types created.

The user types that are part of this integration are:

- WACS_OFSC_Dispatcher_User_Type
- WACS_OFSC_User_Type

To setup user types:

Important! Make sure to load the Properties, Activity Types, and Plugins before proceeding.

1. Login to Oracle Field Service Cloud.
2. Click  on the **Home** page.
3. Navigate to **Configuration** page > **Users, Security, Integrations** > **User Types**.

4. Click **Import** to import the user types.
5. On the **Choose file** field, click **Browse** to select WACS_OFSC_User_Type.
6. Click **Import** and verify the import is successful. Ensure that there are no “Imported with warnings” and “Not Imported”.
7. Click Import ‘WACS_OFSC_Dispatcher_User_Type’. Ensure that there are no “Imported with warnings” and “Not Imported”.

After the Dispatcher user type is set up, perform the following:

1. Make sure the Dispatcher user type import is successful without warnings.
2. Navigate to resources search for admin user. Note the user type configured in your environment.
3. Navigate to **Configuration > User types > WAM OFSC Dispatch Administrator**.
4. On the **General** tab, configure the display profile as ‘WAM OFSC Dispatch Administrator’ and the profile that was configured to admin user.
5. Navigate to **Resources search** for admin and click **Edit**.
6. Set the user type as ‘WAM OFSC Dispatch Administrator’.
7. Enter the password and click **Submit**.

Make sure that the **Access** settings are selected for both the user types.

The screenshot shows the configuration page for a user type named 'WAM OFSC'. The 'User type info' section includes fields for Label (WAM OFSC), Name (WAM OFSC), Active (checked), and Login Policy (Default policy). The 'Access settings' section has four checkboxes: 'Allow access via web application' (checked), 'Use Legacy Manage for Dispatch operations. This functionality is deprecated and is not recommended for new implementations' (unchecked and highlighted with a red box), 'Allow access via installed application for Android' (checked), and 'Allow access via installed application for iOS' (checked).

The screenshot shows the configuration page for a user type named 'WAM OFSC Dispatch Administrator'. The 'User type info' section includes fields for Label (wam_ofsc_dispatcher_administrator), Name (WAM OFSC Dispatch Administrator), Active (checked), and Login Policy (Default policy). The 'Access settings' section has four checkboxes: 'Allow access via web application' (checked), 'Use Legacy Manage for Dispatch operations. This functionality is deprecated and is not recommended for new implementations' (unchecked and highlighted with a red box), 'Allow access via installed application for Android' (checked), and 'Allow access via installed application for iOS' (checked).

Chapter 3: Additional OFSC Configurations

This chapter elaborates on the additional configuration of organization, work zones, outbound channel and UI validations in user types. It includes the following:

- [Sync Mobile Control Data Information from WACS to OFSC](#)
- [Organization](#)
- [Work Zones](#)
- [Resource and Bucket Info](#)
- [Outbound Channel](#)
- [Crew Configuration](#)
- [Offline vs Online Mode](#)
- [Crew Time](#)
- [Inventory Types](#)
- [Timesheet/ Other Direct Charges Flag](#)
- [Timeout Seconds](#)
- [Checklist](#)

Sync Mobile Control Data Information from WACS to OFSC

Information from Oracle Utilities Work and Asset Cloud Service has to be replicated to Oracle Field Service Cloud to provide the drop-down information used in the Oracle Field Service Cloud mobile application. Create work skills, work skill properties, and work skill conditions in Oracle Field Service Cloud to match activities with resources and for crew tracking.

As part of this accelerator, Oracle Utilities WACS OFSC Admin Data Sync deployed on Oracle Integration Cloud (OIC) is provided to create these configurations automatically making migration of data easier and get rid of tedious manual work.

Oracle Utilities WACS OFSC Admin Data Sync needs to be run on initial installation or on a need to basis when new control data from Oracle Utilities Work and Asset Cloud Service or work skill related configurations needs to be created or updated in Oracle Field Service Cloud.

This sync integration process is manually run in OIC by scheduling the integration process to run on a scheduled date or selecting **Submit Now** from the menu of the activated sync integration process to initiate an instance of the integration. An optional language parameter can be entered, it should be an ISO 2 letter language code, to determine the description to retrieve from Oracle Utilities Work and Asset Cloud Service and in what language code the property name should be created in Oracle Field Service Cloud. If the language is not populated or blank, it is defaulted to English (en).

Refer to the Business Flows chapter in *Oracle Utilities Work and Asset Management Integration to Oracle Field Service Cloud Configuration Guide* at https://docs.oracle.com/cd/F41046_01/index.htm.

The following configurations are created/updated by the Sync Process:

- Create/update the enumeration values of the Oracle Field Service Cloud properties.

OFSC Property label	Synced WACS Information
wam_craft	Craft
wam_crew_shift_type	Crew Shift Type
wam_downtime_reason	Downtime Reason
wam_equipment_type	Equipment Type
wam_labor_earning_type	Labor Earning Type
wam_measurement_gauge_reason	Measurement Gauge Reason
wam_measurement_meter_reason	Measurement Meter Reason
wam_other_resource_type	Other Resource Type
wam_overtime_type	Overtime Type
wam_resource_uom	Unit of Measure-Resource
wam_material_uom	Material Unit of Measure
wam_material_stockitemCategory	Stock Item Category
wam_pickup_location_type	Pickup Location Type
wam_work_priority	Pickup Work Priority
wam_work_type	Pickup Work Type
wam_work_category	Pickup Work Category
wam_work_class	Pickup work class
wam_actType_psh	Activity Type To PSH

To verify the information synced from Oracle Utilities Work and Asset Cloud Service to Oracle Field Service Cloud, navigate to the respective property and check the enumeration values. Click **Modify**.

NOTE:

- After a resource is created in Oracle Utilities Work and Asset Cloud Service, the resource code (craft code, equipment code and other resource code) cannot be changed. The sync integration process uses these resource codes to create the enumeration values for equipment type, craft and other resource type property in Oracle Field Service Cloud. Slash (/) should not be included in the resource code.
- The sync integration process cannot delete enumeration values added to a property in Oracle Field Service Cloud; the OFSC REST API that updates the enumeration values of a property does not allow it. The only way to delete an enumeration value(s) in a property is by deleting the property, recreate the property and run the sync to get the latest values.

- Work Skill Related Configurations
 - A work skill is created in Oracle Field Service Cloud for each craft synced from Oracle Utilities Work and Asset Cloud Service. Work skill is a job-specific skill and is used as a criteria to match

activities with the resources. The label format for Work Skill created in Oracle Field Service Cloud is:

- **W_ + WACS craftcode**
Example: Work Skill created in Oracle Field Service Cloud

Edit work skill: "Carpenter"

* Name

* English

SpanishLA

Portuguese (Brazil)

* Label

Sharing of the skill in teamwork ▼

Active

- A work skill property on the activity level is created in Oracle Field Service Cloud for each craft synced from Oracle Utilities Work and Asset Cloud Service. This property will contain information about how many people with the particular work skill is needed for the activity. The label format for Work Skill property created in Oracle Field Service Cloud is:

- **W_ + WAM craftcode + _Nd**

Example: Work Skill Property created in OFSC

Modify Property

Property type ▼

* Property name

* English

SpanishLA

Portuguese (Brazil)

* Property Label

Property hint

English

SpanishLA

Portuguese (Brazil)

Entity [Activity](#)

Regular expression

* Lines count

GUI ▼

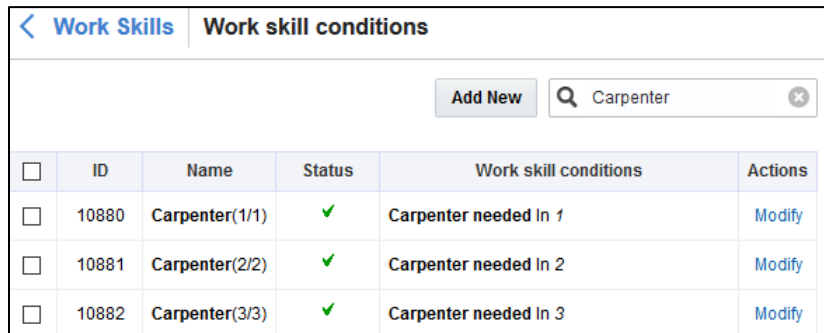
Clone property data on Reopen or Prework

- Work Skill Conditions are created in Oracle Field Service Cloud based on the craft and the configuration property value of workSkillCond.actvtySameSkillMaxWorker.default obtained from WAMOFSC_ConfigProps lookup defined in Oracle Integration Cloud. This configuration

property value contains the maximum number of people with the same work skill allowed to work simultaneously in an activity.

In this example: For work skill = Carpenter and workSkillCond.actvtySameSkillMaxWorker.default = 3, these are the work skill conditions created.

Example: Work Skill Conditions created for Work Skill Carpenter in OFSC



<input type="checkbox"/>	ID	Name	Status	Work skill conditions	Actions
<input type="checkbox"/>	10880	Carpenter(1/1)	✓	Carpenter needed In 1	Modify
<input type="checkbox"/>	10881	Carpenter(2/2)	✓	Carpenter needed In 2	Modify
<input type="checkbox"/>	10882	Carpenter(3/3)	✓	Carpenter needed In 3	Modify

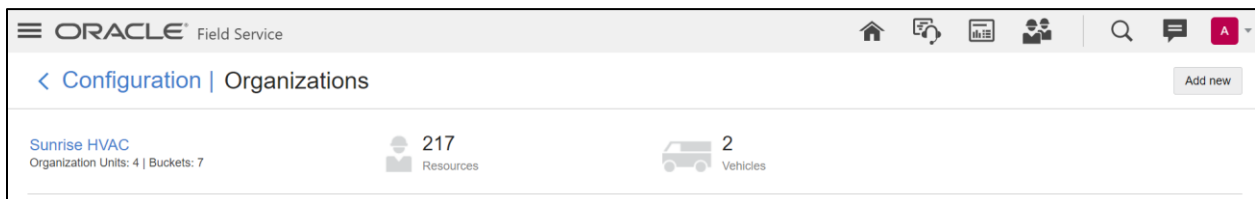
These configuration are used to track teams (crews) consisting of people with different work skills and make sure that activities that require several people simultaneously is assigned to the right team.

Organization

An organization can have buckets, organization units (Org Units), field resources, tools or vehicle associations. Create an organization before adding any type of resource.

To create an organization:

1. Navigate to the **Configuration** page and click **Organization**.
2. Click **Add New** to add a new organization.



3. Enter the name of the organization and click **Submit** to save the details.

Work Zones

Work zones are used to divide area in different zones for better scheduling of crews. Use the work zone keys to provide the ZIP/postal code to facilitate the division through the Service Point information that comes from Oracle Utilities Work and Asset Cloud Service.

To add a work zone:

1. Navigate to the **Configuration** page and click **Work Zone**.
2. Make sure the **Work Zone Key** (top left corner) is ZIP/Postal Code.

ID	Status	Work zone name ^	Work Zone Keys	Actions	Shapes
1	✓	ALTAMONTE SPRINGS	32701, 32714, 44702, 44720	Modify	Shape
14	✓	ANAHEIM	92802, 92806, 92807	Modify	Shape

3. On the **Work Zone** page, click **Add new** to add the required postal codes in the Work Zone Keys field.

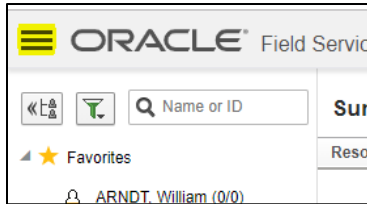
4. Click **Add** to save the new work zone.

Resource and Bucket Info

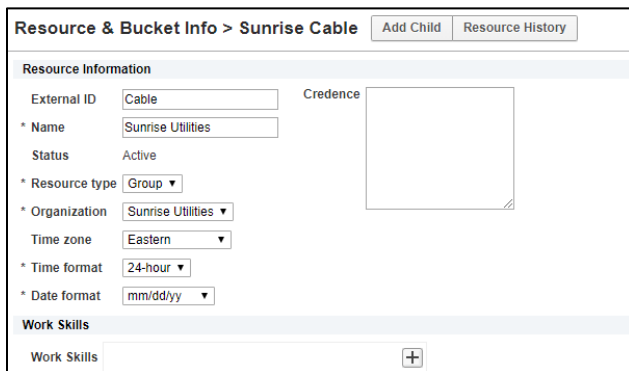
Oracle Field Service Cloud uses bucket and resources to categorize the resources. In this integration, use the bucket as a resource type to route the entire meter service tasks to workers. In the bucket, create two resources (field workers) who are assigned field activities coming from Oracle Utilities Work and Asset Cloud Service.

To create resources in the bucket:

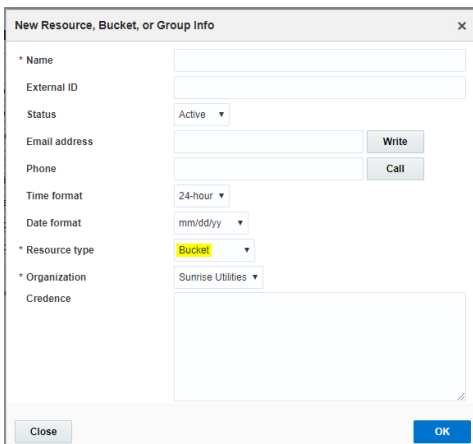
1. On the Oracle Field Service Cloud Home page, click the three lines on the top left corner.



2. Click **Resource & Bucket Info**.
3. Click **Add Child**.

A screenshot of the 'Resource & Bucket Info' form for 'Sunrise Cable'. The form has a title bar with 'Resource & Bucket Info > Sunrise Cable' and two buttons: 'Add Child' and 'Resource History'. The form is divided into two sections: 'Resource Information' and 'Work Skills'. The 'Resource Information' section contains the following fields: 'External ID' (Cable), 'Name' (Sunrise Utilities), 'Status' (Active), 'Resource type' (Group), 'Organization' (Sunrise Utilities), 'Time zone' (Eastern), 'Time format' (24-hour), and 'Date format' (mm/dd/yy). There is a 'Credence' field with a text area. The 'Work Skills' section has a 'Work Skills' field with a plus sign button.

4. Select **Bucket** to add a new bucket in the **Resource type**.
5. Enter the required details and click **OK**.
6. Click **Add Child** and select **Technician** from the **Resource type** drop-down list. Click **OK**.

A screenshot of the 'New Resource, Bucket, or Group Info' dialog box. The dialog box has a title bar with 'New Resource, Bucket, or Group Info' and a close button. The form contains the following fields: 'Name', 'External ID', 'Status' (Active), 'Email address', 'Phone', 'Time format' (24-hour), 'Date format' (mm/dd/yy), 'Resource type' (Bucket), and 'Organization' (Sunrise Utilities). There is a 'Credence' field with a text area. There are 'Write' and 'Call' buttons next to the 'Email address' and 'Phone' fields. At the bottom of the dialog box are 'Close' and 'OK' buttons.

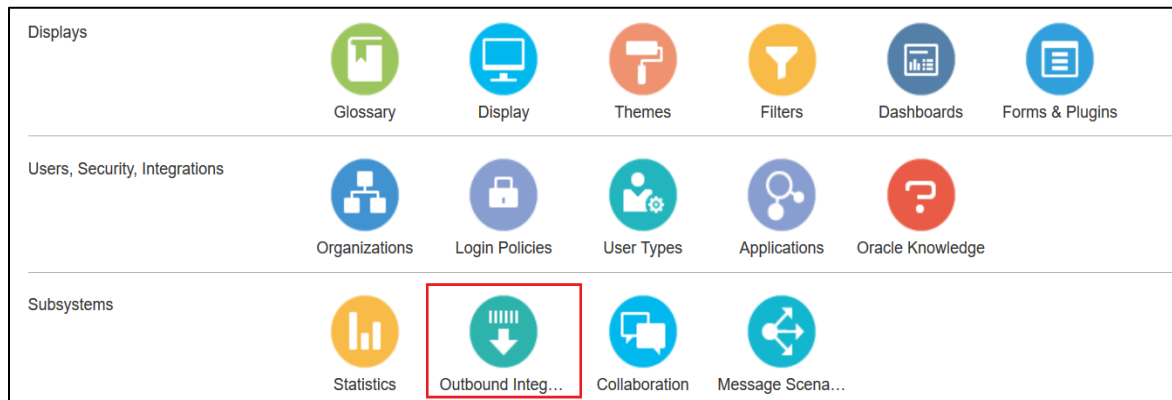
7. Select the required work skills to this Technician. Click **Save**.

Outbound Channel

This element is used to create a channel to communicate with Oracle Utilities Work and Asset Cloud Service through Oracle Integration Cloud. Various channel types can be chosen, but since Oracle Work and Asset Cloud Service integration to Oracle Field Service Cloud is through Oracle Integration Cloud, it is used as the channel type.

To add a communication channel:

1. Navigate to the **Configuration** page > **Subsystems** > **Outbound Integration** icon.



2. Click **Add channel**. Enter the required details and click **OK**.

Name: Name of your choice (Ex: OIC)

Host: your OIC host name

User Name: OIC user name

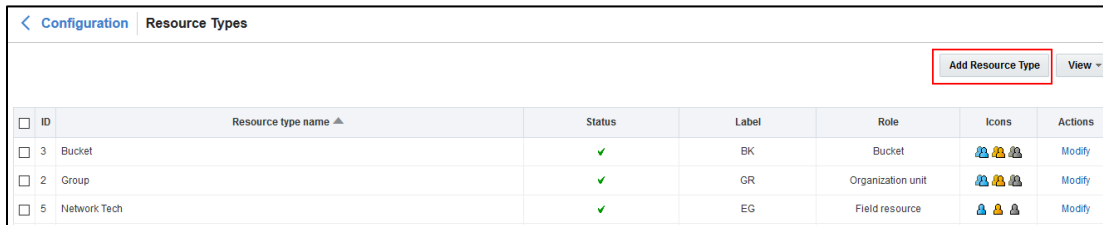
Password: OIC password

Confirm Password: OIC password

Crew Configuration

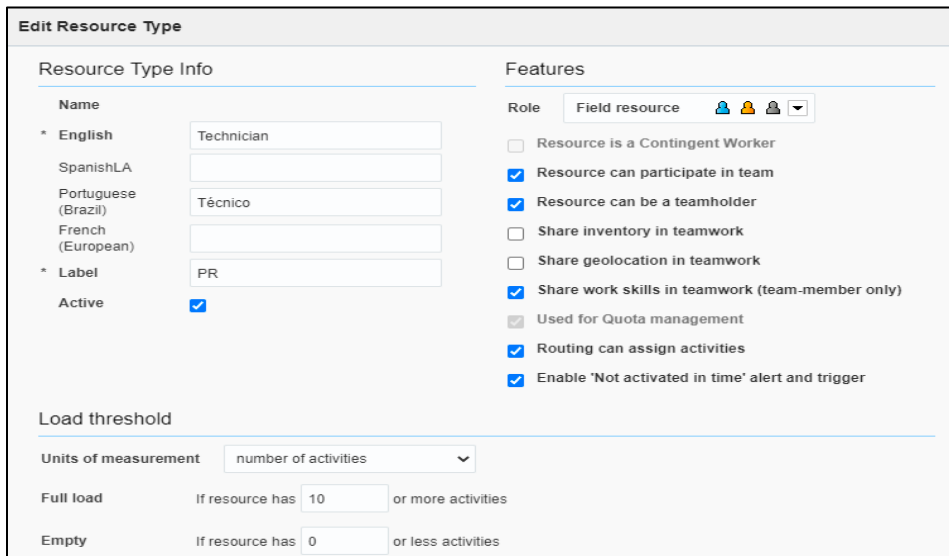
To configure a crew:

1. Navigate to **Configuration** page and click **Resource Types**.
2. Click **Add Resource Type**.



ID	Resource type name ▲	Status	Label	Role	Icons	Actions
3	Bucket	✓	BK	Bucket		Modify
2	Group	✓	GR	Organization unit		Modify
5	Network Tech	✓	EG	Field resource		Modify

3. Enter the required details and make sure the crew has 'PR' as the label. Save the record.



Edit Resource Type

Resource Type Info

Name

* English: Technician

SpanishLA:

Portuguese (Brazil): Técnico

French (European):

* Label: PR

Active:

Features

Role: Field resource

Resource is a Contingent Worker

Resource can participate in team

Resource can be a teamholder

Share inventory in teamwork

Share geolocation in teamwork

Share work skills in teamwork (team-member only)

Used for Quota management

Routing can assign activities

Enable 'Not activated in time' alert and trigger

Load threshold

Units of measurement: number of activities

Full load: If resource has 10 or more activities

Empty: If resource has 0 or less activities

Adding Crew and Crew Member

To create resources for the crew member and crew itself:

1. Navigate to the **Configuration** page > **Resources, Activities, Inventories** > **Resources Types**.
2. Click **Add Resource Type**.
3. Populate the required information and click **Add**.

Add Resource Type

Resource Type Info

Name

* English

SpanishLA

Portuguese (Brazil)

French (European)

* Label

Active

Features

Role

Resource is a Contingent Worker

Resource can participate in team

Resource can be a teamholder

Share inventory in teamwork

Share geolocation in teamwork

Share work skills in teamwork (team-member only)

Used for Quota management

Routing can assign activities

Enable 'Not activated in time' alert and trigger

Load threshold

Units of measurement

Full load If resource has or more activities

Empty If resource has or less activities

Travel Allowance

Start of Day Travel

Working Time does not include the Travel Time to the first activity

Working Time includes the Travel Time to the first activity

Working Time includes up to minutes of the Travel Time to the first activity

End of Day Travel

Working Time does not include the Travel Time from the last activity to the Resources End Location

Working Time includes the Travel Time from the last activity to the Resources End Location

Working Time includes up to minutes of the Travel Time from the last activity to the Resources End Location

Statistic Parameters

Personalize the estimation of activity duration

Use data reported to enhance company-wide estimations

Do not consider reported data of the first working days, for statistic estimations

4. Repeat steps 2 and 3 to create resource types for crew members.

Adding Truck Resource Type

To add a truck resource type:

1. Repeat steps 1 and 2 in the [Crew Configuration](#) section.
2. Populate the required information and make sure the Truck has 'TR' in the label. Click **Add**.

Edit Resource Type

Resource Type Info		Features	
Name		Role	Vehicle
* English	Truck	<input checked="" type="checkbox"/>	Share inventory in teamwork
SpanishLA	Carro	<input checked="" type="checkbox"/>	Share geolocation in teamwork
Portuguese (Brazil)	Caminhão	<input type="checkbox"/>	Share work skills in teamwork (team-member only)
French (European)		<input type="checkbox"/>	Working time includes first travel to activity
* Label	TR	<input type="checkbox"/>	Working time includes travel to final location (if defined)
Active	<input checked="" type="checkbox"/>		
Load threshold			
Units of measurement	number of activities		
Full load	If resource has 10 or more activities		
Empty	If resource has 2 or less activities		

Travel Allowance

Start of Day Travel

Working Time does not include the Travel Time to the first activity

Working Time includes the Travel Time to the first activity

Working Time includes up to _____ minutes of the Travel Time to the first activity

End of Day Travel

Working Time does not include the Travel Time from the last activity to the Resources End Location

Working Time includes the Travel Time from the last activity to the Resources End Location

Working Time includes up to _____ minutes of the Travel Time from the last activity to the Resources End Location

Assigning Resources

To add multiple resources to a crew so that they can assist it in the completion of work:

1. Navigate to the **Activities** page and observe various resources.
2. Drag and drop the resources to the crew so as they can assist.

Dispatch Console | OHMeter

Search: Name or ID

- Sunrise HVAC
- CA, USA (0)
- FL, USA (0)
- HVAC Contractor (0)
- NV, USA (0)
- Utilities
- OHMeter (1)**
 - CMEM001 (0/0)
 - CREWMEM001 (0/0)
 - CREWMEM002 (0/0)
 - Lakshmi (0/0)
 - OH001 (0/1)
 - QA_U (0/0)
 - Reshma (0/1)

Resources

- CMEM001
- CREWMEM001
- CREWMEM002
- Lakshmi
- OH001
- QA_USER
- Reshma

Teamwork with resource: OH001 (0/1)

3. On successful drag and drop, add activities to the crew.

The screenshot shows a web form titled "Add Activity" within a "Dispatch Console" interface. At the top, it says "Assign: BOVE, Leticia". Below this, there's a section "Add Activity?" with several input fields:

- Activity Type:** A dropdown menu currently showing "Assisting".
- Duration:** Two input fields: "0" for hours and "00" for minutes.
- Time Slot:** Two input fields for "hh:mm" and a dropdown for "AM".
- Position in Route:** A dropdown menu currently showing "Ordered".

4. Populate the required information and click **Submit**.

Offline vs Online Mode

When the crew is enroute to perform an activity in the field there is a possibility that the location does not have network (offline mode); if the network exists, the mode is online. When online, crew can perform the work, validate the completion of the activity, and submit the activity for completion. But, when offline, though the crew can validate and complete the activity, this completion information will be synched to server and message is sent out of Oracle Field Service Cloud only when it comes online.

Note: No offline support is currently provided when adding attachments to a service history. If crew time is entered offline, supervisor has to open the **Resource Usage** page when online before going offline. This make sure all relevant crew member information needed is available on local storage before going offline.

Timesheets/equipment/others can be entered in offline mode, but cannot be completed. All individual **Complete** buttons and **CompleteAll** button will be disabled in offline mode.

The crew should open all plugins once when online before starting the work in offline mode to sync required information in local storage.

Crew Time

As part of the crew time sheet functionality, from the plugin, there is an invocation call to OFSC REST API to configure the crew members under Crew.

To call OFSC REST API from the plugin, set up cross-origin resource sharing (CORS) in Oracle Field Service Cloud as follows:

1. Navigate to **Configuration > Application > Additional Resources**.
2. Select **Allow Cross-origin resource sharing (CORS) from the following web domains** and provide the Oracle Field Service Cloud domain.

If the domain details are unknown, enter '*'. For the actual Oracle Field Service Cloud domain contact the Oracle Field Service Cloud support team.

Additional restrictions

- Allow access only to certain resources
- Allow access only for certain IP-addresses
- Allow Cross-origin resource sharing (CORS) from the following web domains

Each line should contain one domain name.
Example:
<https://www.example.com>
<https://best.customer.com>
<https://bestcust.com>

Inventory Types

The inventory types (such as asset, material, etc) are stored in Oracle Field Service Cloud.

To add an inventory type:

1. Navigate to **Configuration > Inventory Types**. Click **Add New**.

ID	Name	Label	Unit	Model Property	Status	Non-serialized
1	2T Trans A/C	NT		Model	✓	
2	Rheem RTE13 4 0 Tankless W/H	DT		Model	✓	
3	Goodman 46,000 BTU Furnace	AT		Model	✓	
4	40 Gal Rheem H/W Heater	TV		Model	✓	

2. Enter the details as shown below and click **Save**.

* Label: Asset

Active:

Non Serialized:

Model Property: Item Type [Item Type]

* Name

* English: Asset

SpanishLA:

Portuguese (Brazil):

Close Save

3. Repeat step 2 for StockItem, StockAsset, issuedAsset and issuedComponent.

* Label	<input type="text" value="StockItem"/>		
Active	<input checked="" type="checkbox"/>		
Non Serialized	<input checked="" type="checkbox"/>		
Decimal quantity	<input checked="" type="checkbox"/>		
Quantity precision	<input type="text" value="2"/>		
Model Property	<input type="text" value="Material Id [wam_material_id]"/>		
* Name		Unit of Measurement	
* English	<input type="text" value="Items"/>	* English	<input type="text" value="items"/>
SpanishLA	<input type="text"/>	SpanishLA	<input type="text"/>
Portuguese (Brazil)	<input type="text"/>	Portuguese (Brazil)	<input type="text"/>
<input type="button" value="Close"/>		<input type="button" value="Save"/>	

Note: Default Quantity precision is set to 2. User can configure it as per their need.

* Label	<input type="text" value="StockAsset"/>		
Active	<input checked="" type="checkbox"/>		
Non Serialized	<input checked="" type="checkbox"/>		
Decimal quantity	<input type="checkbox"/>		
Model Property	<input type="text" value="Material Id [wam_material_id]"/>		
* Name		Unit of Measurement	
* English	<input type="text" value="Assets"/>	* English	<input type="text" value="asset"/>
SpanishLA	<input type="text"/>	SpanishLA	<input type="text"/>
Portuguese (Brazil)	<input type="text"/>	Portuguese (Brazil)	<input type="text"/>
<input type="button" value="Close"/>		<input type="button" value="Save"/>	

* Label	<input type="text" value="issuedAsset"/>		
Active	<input checked="" type="checkbox"/>		
Non Serialized	<input type="checkbox"/>		
Model Property	<input type="text" value="Item Type [Item Type]"/>		
* Name			
* English	<input type="text" value="Issued Assets"/>		
SpanishLA	<input type="text"/>		
Portuguese (Brazil)	<input type="text"/>		
<input type="button" value="Close"/>		<input type="button" value="Save"/>	

* Label: issuedComponent

Active:

Non Serialized:

Model Property: Item Type [Item Type]

* Name

* English: Issued Components

SpanishLA:

Portuguese (Brazil):

Buttons: Close, Save

Timesheet/ Other Direct Charges Flag

This flag indicates whether mobile worker is allowed to add timesheet/other direct charges for completed activity.

In the Oracle Utilities Work and Asset Management master configuration, the following properties accept values - Yes/No.

- Allow Timesheet against completed activity
- Allow ODC against completed activity

Work Management Master Configuration

Main

BUSINESS OBJECT: Work Management Master Configuration

Work Order Parameters

WORK ORDER AUTO CLOSURE NUMBER OF DAYS:

ALLOW STOCK ISSUE AGAINST COMPLETED ACTIVITY: Yes (W1YS)

ALLOW TIMESHEET AGAINST COMPLETED ACTIVITY: No (W1NO)

ALLOW ODC AGAINST COMPLETED ACTIVITY: No (W1NO)

To set the value of these properties in Oracle Field Service Cloud:

- Navigate to **Configuration > Properties**. Search for **Resource Usage Flag**.

ID	Property name	Property Label	Type	Entity	GUI	Actions
1225	Resource Usage Flag	wam_ru_comp_act_flag	enumeration	Activity	combobox	Modify

- Click **Modify**. Go to the **Enumeration values** section. TS and ODC indicate Timesheet and Other Direct Charges respectively. Default value for both flag is “NO”.

- To change the value of flags, select or unselect the **Active** checkbox to make the corresponding enum values of YES/NO active or inactive respectively.
- Click **Change** > **Update** to reflect the changes. Else, click **Cancel**.

Timeout Seconds

User can set the value of timeout variable in seconds that indicates a limit on how long they are willing to wait for a response from a service to come back on client side. This configuration is added to stop the loading spinner and display timeout message on UI if the request takes too long for response.

To set the value of this property in Oracle Field Service Cloud:

- Navigate to **Configuration > Properties**. Search for “Timeout”.

ID	Property name	Property Label	Type	Entity	GUI	Actions
1240	Timeout	timeout	enumeration	Activity	combobox	Modify

- To add new value for timeout, click **Modify** and go to the **Enumeration values** section.

- a. Provide key and value in seconds.
- b. Click **Add**.
- c. Select or unselect the **Active** checkbox to make the corresponding enum values of timeout active or inactive respectively.
- d. Click **Change > Update** to reflect the changes. Else, click **Cancel**.

The screenshot shows a 'Modify Property' dialog box. At the top, there is a checkbox labeled 'Clone property data on Reopen or Prework' which is currently unchecked. Below this is a section titled 'Enumeration values'. It contains three input fields: 'English' (with a cursor and brackets), 'SpanishLA', and 'Portuguese (Brazil)'. To the right of these fields are 'Add' and 'Change' buttons. Below the enumeration fields is a checked checkbox labeled 'Active'. At the bottom of the dialog is a 'Values' section with a list box containing the entry '60[60]'. At the very bottom of the dialog are 'Cancel' and 'Update' buttons.

Note: Default value of timeout is 60 seconds. There must be only one value active at a time.

Checklist

Before proceeding to [Chapter 4: User Operations](#) verify if the following activities are complete.

- All the Activity Types specific to customer are created
- Properties are imported
- User Types are imported
- Plugins are configured
- Make sure the quota is allocated and need not be configured
- Name of the organization
- Sync information from Oracle Utilities Work and Asset Cloud Service to Oracle Field Service Cloud
- Work Skills are created
- Name of the resources, work zones
- Inventory Types are created
- Details of Oracle Integration Cloud used to create the outbound channel

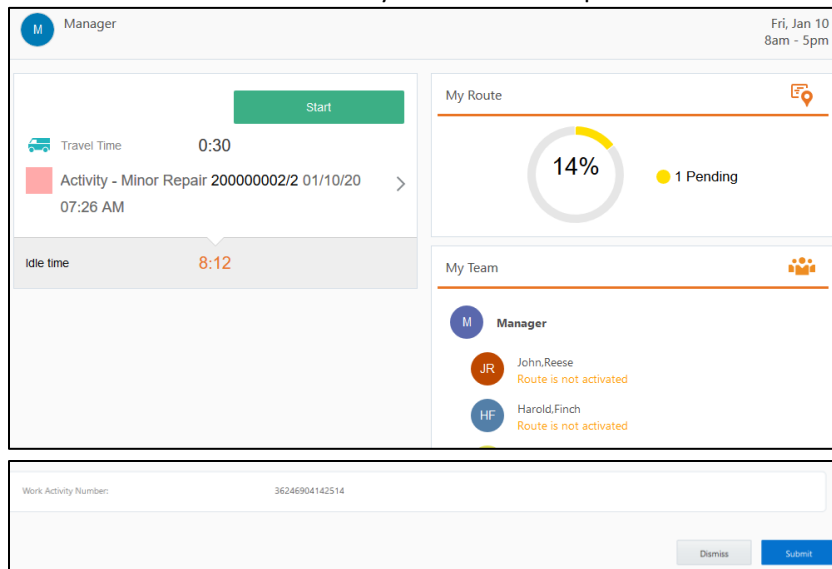
Chapter 4: User Operations

This chapter provides step-by-step instructions for user operations. It includes the following:

- [Starting Activity](#)
- [Locking Activity](#)
- [Activity Details](#)
- [Service Histories](#)
- [Measurements](#)
- [Resource Usage](#)
- [Activity Completion](#)
- [Assets Installs and Removals](#)
- [Pick Up and Follow Up Orders](#)
- [Mobile Inventory Management](#)

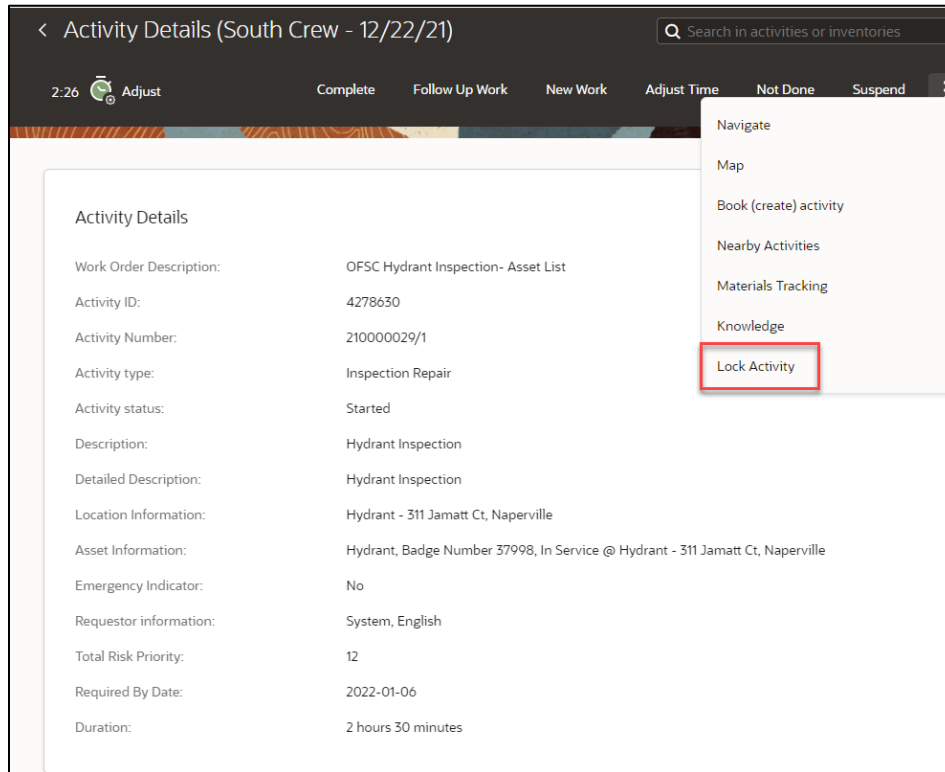
Starting Activity

1. Login to Oracle Field Service Cloud Mobility application.
2. Access the **Mobility** page using the worker/technician's credentials. The page shows the activities in the queue of the worker.
3. Click **Start** to start the activity in the worker's queue.



Locking Activity

Activity is presented to mobile user in read only mode. In order to make changes to the activity, enter completion information, service histories and resource usage user must lock the activity. Locking activity guarantee that only one member of the crew will be updating the activity. Once the work is done user should unlock the activity so other crew members can add their updates.



Activity Details

The crew can see various information about activity including resources required for the activity and assets to be serviced.

< Activity Details (South Crew - 12/22/21)

2:15 Adjust Complete Follow Up Work New Work Adjust Time Not Done

Activity Details

Work Order Description: OFSC Hydrant Inspection- Asset List
 Activity ID: 4278630
 Activity Number: 210000029/1
 Activity type: Inspection Repair
 Activity status: Started
 Description: Hydrant Inspection
 Detailed Description: Hydrant Inspection
 Location Information: Hydrant - 311 Jamatt Ct, Naperville
 Asset Information: Hydrant, Badge Number 37998, In Service @ Hydrant - 311 Jamatt Ct, Naperville
 Emergency Indicator: No
 Requestor Information: System, English
 Total Risk Priority: 12
 Required By Date: 2022-01-06
 Duration: 2 hours 30 minutes

Location Information

Address: 311 Jamatt Ct
 City: Naperville
 State: IL
 ZIP/Postal Code: 60540

Quick Links

Assets Resources Planned Service History Resource Usage

To view the resources, navigate to the **Activity Details** page and click **Resources**. Resources include planned materials, work skills, equipment and Other resources defined by activity planner.

< Resources (South Crew - 12/22/21)

2:05 Adjust Complete Follow Up Work New Work Adjust Time Not Done Suspend Navigate Map Book (create) activity

Search in activities or inventories

Materials:

CENTRAL STOREROOM

O-Ring, NB70	1.00000 O-Ring, NB70 (0000036), Each, 11.6400000, Inventory
Seal, Grease, D5419	1.00000 Seal, Grease, D5419 (0000035), Each, 89.2500000, Inventory
Seal, Rod, Connecting, NB60	1.00000 Seal, Rod, Connecting, NB60 (0000038), Each, 45.9600000, Inventory
GASKET, PLATE, COVER	1.00000 GASKET, PLATE, COVER (0000182), Each, 34.9500000, Inventory

Work Skills:

Maintenance Technician	Maintenance Technician (1 for 0.50 hrs)
------------------------	---

Equipment:

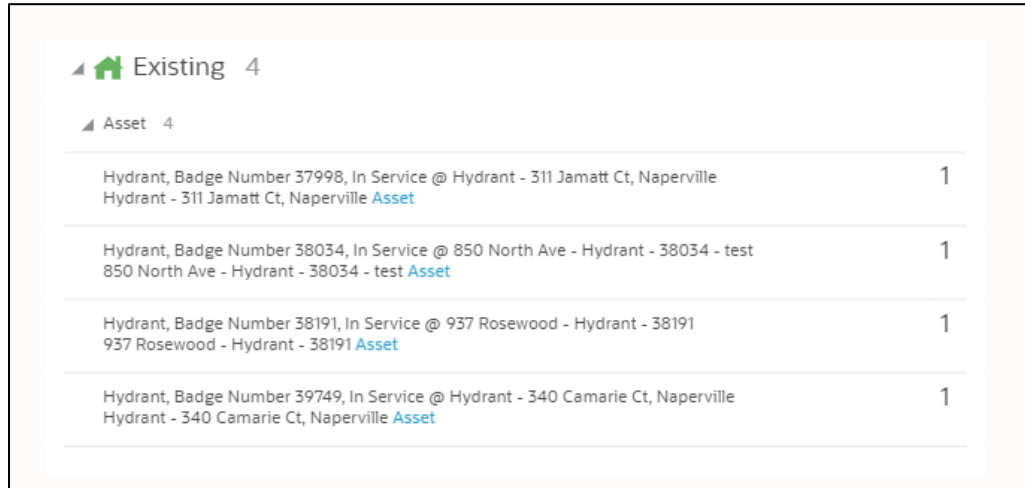
Portable HDPE Poly Welder Pipe Fusion Fusing Machine	1 Portable HDPE Poly Welder Pipe Fusion Fusing Machine for 4.00 Hour
--	--

Other:

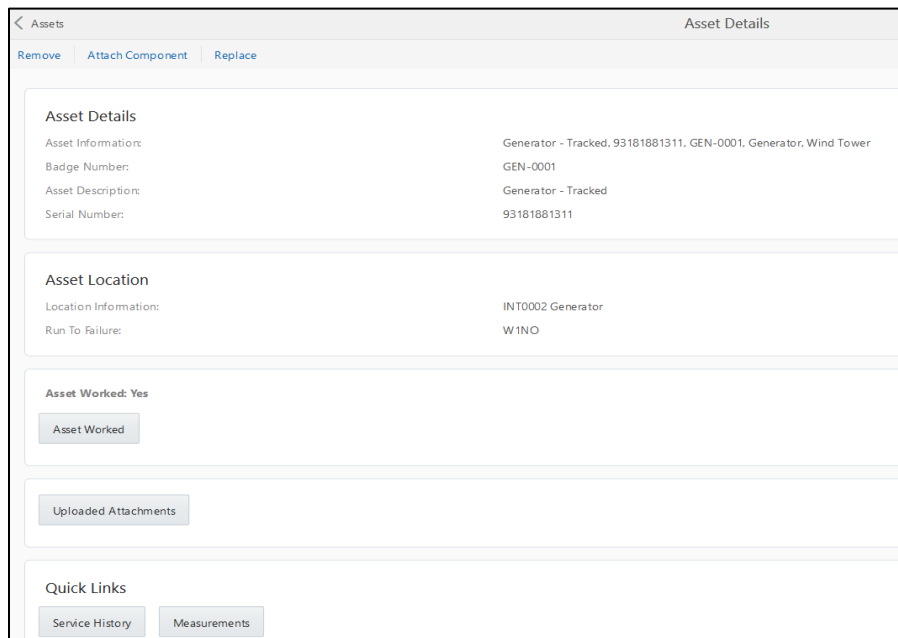
Contractor Services	1.00000 (Contractor Services), Dollar
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To view the list of assets for an activity, navigate to the **Activity Details** page and click **Assets**.

Oracle Field Service Cloud displays all assets attached to this activity. Select the required asset to view the asset information.



Existing 4	
Asset 4	
Hydrant, Badge Number 37998, In Service @ Hydrant - 311 Jamatt Ct, Naperville Hydrant - 311 Jamatt Ct, Naperville Asset	1
Hydrant, Badge Number 38034, In Service @ 850 North Ave - Hydrant - 38034 - test 850 North Ave - Hydrant - 38034 - test Asset	1
Hydrant, Badge Number 38191, In Service @ 937 Rosewood - Hydrant - 38191 937 Rosewood - Hydrant - 38191 Asset	1
Hydrant, Badge Number 39749, In Service @ Hydrant - 340 Camarie Ct, Naperville Hydrant - 340 Camarie Ct, Naperville Asset	1



Assets Asset Details

Remove Attach Component Replace

Asset Details

Asset Information: Generator - Tracked, 93181881311, GEN-0001, Generator, Wind Tower

Badge Number: GEN-0001

Asset Description: Generator - Tracked

Serial Number: 93181881311

Asset Location

Location Information: INT0002 Generator

Run To Failure: W1NO

Asset Worked: Yes

Asset Worked

Uploaded Attachments

Quick Links

Service History Measurements

Service Histories

There are two types of Service Histories that can be entered for activity.



- **Planned Service Histories:** Planned service histories are requested by a person who plans an activity and must be entered by field crew. These service histories can be entered from the **Planned Service Histories** page. After creating a history, they will be displayed among Asset specific Service Histories.
- **Asset Service Histories:** Asset Service Histories are additional service histories valid for that asset. They are listed in the **Asset's Service Histories** page.

Planned Service Histories

To enter planned service histories, navigate to the **Activity Details** page and click **Planned Service History**. The **Planned Service Histories** page is displayed.

Activity Information: 210000029/1 - Hydrant Inspection

Asset Information: All applicable assets

 **Planned Service History List**  **Entered**

Hydrant Inspection Questionnaire Required: Yes Entered: 1 +	Downtime Status :PENDING ✎
Downtime Required: No Entered: 1 +	General SH Status :PENDING ✎
General SH Required: No Entered: 1 +	Hydrant Inspection Questionnaire Status :PENDING ✎
Failure Asset Specific	

Quick Links

[Asset Details](#) [Activity Details](#)

Asset Service Histories

To enter the asset's service histories, navigate to the **Asset** page and click **Service History**.

Activity Information: 210000029/1 - Hydrant Inspection
 Asset Information: Hydrant, Badge Number 37998, In Service @ Hydrant - 311 Jamatt Ct, Naperville
 Asset Location Information: Hydrant - 311 Jamatt Ct, Naperville

Service History List Entered

Hydrant Inspection Questionnaire Required: Yes Entered: 1 Planned: Yes	+	No items to display.
Downtime Required: No Entered: 1 Planned: Yes	+	
Failure Required: No Entered: 0 Planned: No	+	
General SH Required: No Entered: 1 Planned: Yes	+	
Reset Asset Condition Service History Required: No Entered: 0 Planned: No	+	
General Repair SH Required: No Entered: 0 Planned: No	+	
PM - Hydrant Inspection Required: No Entered: 0 Planned: No	+	
PM Event- Annual Shutdown Required: No Entered: 0 Planned: No	+	

Planned

Downtime Status: PENDING	⊖
General SH Status: PENDING	⊖
Hydrant Inspection Questionnaire Status: PENDING	⊖

Quick Links

Asset Details Activity Details Complete All

To enter the service history details:

- a. Click **Service History** on the **Assets** page.
- b. From the list of service histories that are part of the activity, select '+' next to the specific service history to add the required details.

Activity Information 200000002/2 - PP_WO2
 Asset Information Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
 Asset Location Information Pump 2, RAS, Middle

Service History List Entered

General SH Required: Yes Entered: 0	+	No items to display.
Downtime Required: No Entered: 0	+	
Failure Required: No Entered: 0	+	

- c. Click **Complete**. The service histories are displayed in the **Entered** pane.

Activity Information	20000002/2 - PP_WO2
Asset Information	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Asset Location Information	Pump 2, RAS, Middle

Service History List

<p>General SH Required: Yes Entered: 2</p>	+
--	---

<p> Entered</p>	
<p>General SH Status :COMPLETED</p>	✎

Note: Crew can also save the service history in 'pending' state. Click **Save**. The pending service histories are displayed in the **Entered** pane with the 'pending' status.

General SH

Asset Information	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Asset Location Information	Pump 2, RAS, Middle
Effective Date/Time	<input type="text" value="2020-01-10T18:00:20"/>

Service History Comments

Save Complete Dismiss

Activity Information	20000002/2 - PP_WO2
Asset Information	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Asset Location Information	Pump 2, RAS, Middle

Service History List

<p>General SH Required: Yes Entered: 2</p>	+
<p> Entered</p>	
<p>General SH Status :COMPLETED</p>	✎
<p>General SH Status :PENDING</p>	✎

- d. To complete a service history in 'pending' status:
 - i. Click **Edit** to edit a specific service history.

Activity Information	20000002/2 - PP_WO2
Asset Information	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Asset Location Information	Pump 2, RAS, Middle

Service History List
Entered

General SH Required: Yes Entered: 2	+	General SH Status : COMPLETED	✎
Downtime Required: No Entered: 0	+	General SH Status : PENDING	✎

ii. Click **Attach** to attach images of various artifacts.

Asset Information	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Asset Location Information	Pump 2, RAS, Middle
Effective Date/Time	<input type="text" value="2020-01-10T17:57:23"/>

Service History Comments

Save
Complete
Delete
Attach
Dismiss

iii. Browse and select the file to attach. Click **Upload**.

Attach	<input style="border: 2px solid red;" type="button" value="Browse..."/> OIC.JPG
Comments	<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>

Upload
Dismiss

iv. Click **Complete**.

General SH

Asset Information	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Asset Location Information	Pump 2, RAS, Middle
Effective Date/Time	<input type="text" value="2020-01-10T17:26:12"/>

Service History Comments	<input type="text" value="Repaired"/>
--------------------------	---------------------------------------

The completed service histories are displayed in the **Entered** pane. The number of times the service history was edited is also shown.

Activity Information	200000002/2 - PP_WO2
Asset Information	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Asset Location Information	Pump 2, RAS, Middle

<p>Service History List</p> <table border="1"> <tr> <td> General SH Required: Yes Entered: 2 </td> <td style="text-align: center;">+</td> </tr> <tr> <td> Downtime Required: No Entered: 0 </td> <td style="text-align: center;">+</td> </tr> </table>	General SH Required: Yes Entered: 2	+	Downtime Required: No Entered: 0	+	<p>Entered</p> <table border="1"> <tr> <td> General SH Status: COMPLETED </td> <td style="text-align: right;">✎</td> </tr> <tr> <td> General SH Status: COMPLETED </td> <td style="text-align: right;">✎</td> </tr> </table>	General SH Status: COMPLETED	✎	General SH Status: COMPLETED	✎
General SH Required: Yes Entered: 2	+								
Downtime Required: No Entered: 0	+								
General SH Status: COMPLETED	✎								
General SH Status: COMPLETED	✎								

- e. Populate the details for required service histories.
- f. Make sure the service histories that are marked as 'Required: Yes' have at least one entry.
- g. Click **Asset Details** to navigate back to the **Asset Details** page.

Supported Service Histories Types

There are 5 Service Histories categories supported out of box: Questionnaire, Inspection, Failure, Downtime and General. They correspond to business objects define in WAM. See Customization section to see how to create custom service history categories.

Measurements

To enter an asset's measurements:

1. Navigate to the **Assets** page.
2. Click **Measurements**.

The screenshot shows the 'Asset Details' page. It has a header with a back arrow and 'Assets' on the left, and 'Asset Details' on the right. Below the header are three sections: 'Asset Details', 'Asset Location', and 'Asset Worked'. At the bottom, there are two buttons: 'Service History' and 'Measurements'. The 'Measurements' button is highlighted with a red rectangular box.

Asset Details	
Asset Information:	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Badge Number:	PP002
Asset Description:	Pump - Singlestage, Centrifugal
Serial Number:	PP002

Asset Location	
Location Information:	Pump 2, RAS, Middle
Building:	RAS Pumping
Service Area:	North

Asset Worked:	On
---------------	----

Buttons:

3. Click + on the **Measurement Mobility** page.

The screenshot shows the 'Measurement Mobility' page. It has a header with 'Activity Information' and '200000002/2 - PP_WO2'. Below the header are three sections: 'Asset Information', 'Asset Location Information', and 'Measurements'. The 'Measurements' section has a plus icon in a red box. Below the 'Measurements' section are two buttons: 'Asset Details' and 'Activity Details'.

Activity Information:	200000002/2 - PP_WO2
-----------------------	----------------------

Asset Information:	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
--------------------	---

Asset Location Information:	Pump 2, RAS, Middle
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4. Enter the required measurement details and click **Save**.

The screenshot shows the 'Measurement' form. It has a header with 'Asset Information' and 'Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle'. Below the header are two sections: 'Asset Location Information' and 'Measurement Type'. The 'Measurement Type' section has a dropdown menu with 'Gallons Flow' selected. Below the 'Measurement Type' section are three sections: 'Reading Date/Time', 'Reading', and 'Reason'. The 'Reading Date/Time' section has a text input field with '2020-01-10T18:24:26'. The 'Reading' section has a text input field with '1'. The 'Reason' section has a dropdown menu with 'Planned' selected. At the bottom, there are two buttons: 'Save' and 'Dismiss'. The 'Save' button is highlighted with a red rectangular box.

Asset Information	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Asset Location Information	Pump 2, RAS, Middle

Measurement Type	Gallons Flow
------------------	--------------

Reading Date/Time	2020-01-10T18:24:26
-------------------	---------------------

Reading	1
---------	---

Reason	Planned
--------	---------

Buttons:

The measurement is displayed in the list.

The screenshot shows a software interface with the following content:

- Activity Information:** 20000002/2 - PP_WO2
- Asset Information:** Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
- Asset Location Information:** Pump 2, RAS, Middle

Below this is a section titled **Measurements** with a plus icon. It contains a list item:

- Gallons Flow** (highlighted with a red box)
- Reading Date/Time: Jan 10, 2020 at 6:24 PM
- Reading: 1

At the bottom of the measurements list are two icons: a pencil (edit) and a minus sign. Below the measurements section are two buttons: **Asset Details** and **Activity Details**.

- a. Click the edit icon to edit the measurement. You can enter multiple measurements.
- b. Click **Activity Details** to navigate back to the **Activity Details** page.

Resource Usage

To enter resource usage details:

1. Click **Resource Usage** on the **Activity Details** page.

The screenshot shows the **Activity Details** page with the **Resource Usage** tab selected. The page contains the following information:

Work Order Description:	PP_WO2
Activity Number:	20000002/2
Activity Type:	Activity - Inspection/Repair (External)
Description:	PP_WO2
Detailed Description:	PP_WO2
Location Information:	Pump 2, RAS, Middle
Asset Information:	Pump - Singlestage, Centrifugal, Badge Number PP002, In Service @ Pump 2, RAS, Middle
Emergency Indicator:	No
Requestor information:	Herrala 'WAM v2206 DEMO', Kimberley
Total Risk Priority:	42
Required By Date:	2020-01-27
Duration:	48 minutes
Traveling Time:	1 minutes

2. Enter the time sheets, equipment, and other details.

Time Sheets

Crew can enter individual timesheets (highlighted in purple) or for team (highlighted in yellow).

Activity Information 20000002/2 - PP_WO2

TimeSheet  

No items to display.

Equipment 

No items to display.

Other 

No items to display.

Activity Details

3. Click the '+' icon of multiple crew timesheet (highlighted in yellow above).
4. Enter the required information and click **Save**.

Activity Information 20000002/2

Employee Information Manager

Date 01 / 10 / 2020

Regular/Overtime Regular

Crew Shift Type Day Shift

Labor Earning Type Regular

Hours 1

Work Started 2020-01-10T07:26:00

Work Stopped 2020-01-10T08:26:00

Travel Time HH: 0 MM: 1

Employee Craft Add






Manager	Carpenter	<input checked="" type="checkbox"/>
John, Reese	Electrician	<input checked="" type="checkbox"/>
Harold, Finch	Inspector	<input checked="" type="checkbox"/>
Chandra Perni		<input type="checkbox"/>

Save Dismiss

The timesheets for each crew member are created in 'pending' status.

Activity Information 200000002/2 - PP_WO2

TimeSheet

1 Hours , Jan 10,2020 User: Manager Status: Pending	
1 Hours , Jan 10,2020 User: John,Reese Status: Pending	
1 Hours , Jan 10,2020 User: Harold,Finch Status: Pending	
1 Hours , Jan 10,2020 User: Chandra Perni Status: Pending	
1 Hours , Jan 10,2020 User: Chandra Perni Status: Pending	

Equipment

No items to display.

5. Click the **Edit** icon and complete the timesheet.

Activity Information 200000002/2

Employee Information John,Reese

Date 01 / 10 / 2020

Regular/Overtime Regular

Crew Shift Type Day Shift

Labor Earning Type Regular

Craft

Hours 1

Work Started 2020-01-10T07:26:00

Work Stopped 2020-01-10T08:26:00

Travel Time HH: 0 MM: 1

Save **Complete** Delete Dismiss

6. Complete the timesheets for all other crew members.

Activity Information	200000002/2 - PP_WO2
TimeSheet	
Electrician , 1 Hours , Jan 10,2020 User: Manager Status: Completed	✓
Carpenter , 1 Hours , Jan 10,2020 User: John,Reese Status: Completed	✓
Carpenter , 1 Hours , Jan 10,2020 User: Harold,Finch Status: Completed	✓
Electrician , 1 Hours , Jan 10,2020 User: Chandra Perni Status: Completed	✓
Electrician , 1 Hours , Jan 10,2020 User: Chandra Perni Status: Completed	✓

7. Populate entries for equipment and other.

Activity Completion

1. Navigate back to the **Activity Details** page after populating all the required resource details.
2. Click **Complete** to verify the eligibility of the activity to complete.

< Activity Details (03/26/21)

Complete Follow Up Work New Work Map Book (create) activity Knowledge Unlock Activity

Activity Details

Work Order Description:	First test demo
Activity ID:	4239553
Activity Number:	200000036/180
Activity Type:	Activity - Minor Repair
Activity Status:	Started
Description:	Issued Assets test
Location Information:	Fan Room Heating System
Asset Information:	Fan - Centrifugal, Badge Number A1009, In Service @ Capacitor 8 - Bus 2
Emergency Indicator:	No

3. If all the activities are not eligible for activity completion, the following message is displayed. Click **OK**.

Required service histories are not completed

4. Else, it will navigate to the **End Activity** page. Click **Submit**.

The completion information is sent to Oracle Utilities Work and Asset Cloud Service and the activity is completed.

Assets Installs and Removals

This section includes steps to perform asset installations and removals:

To install an asset:

1. Start the activity.
2. To install an asset, click the location.

Assets/Equipment	
Existing	4
Asset	4
4B Scanner Air Fan	1
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1	1

3. Click **Install Asset**.

Install Asset Follow Up Work

Asset Location

Location Information: 4B Scanner Air Fan

Building: Boiler

Service Area: North

4. Enter the **Badge Number** of the Asset to be installed on this location. Click **Search and Add**.

Asset Operation: Attach Component

Activity Information: 200000037/17

Main Asset Information: Fan - Centrifugal, Badge Number 4053_4APRI_FAN, In Service @ 4A Primary Air Fan

Effective Date Time*: 11/16/2020 05:38:51 PM

Badge Number*:

Search And Add **Dismiss**

The newly installed asset is listed in the **Installed pool**.

Assets/Equipment

Existing 3

Asset 3

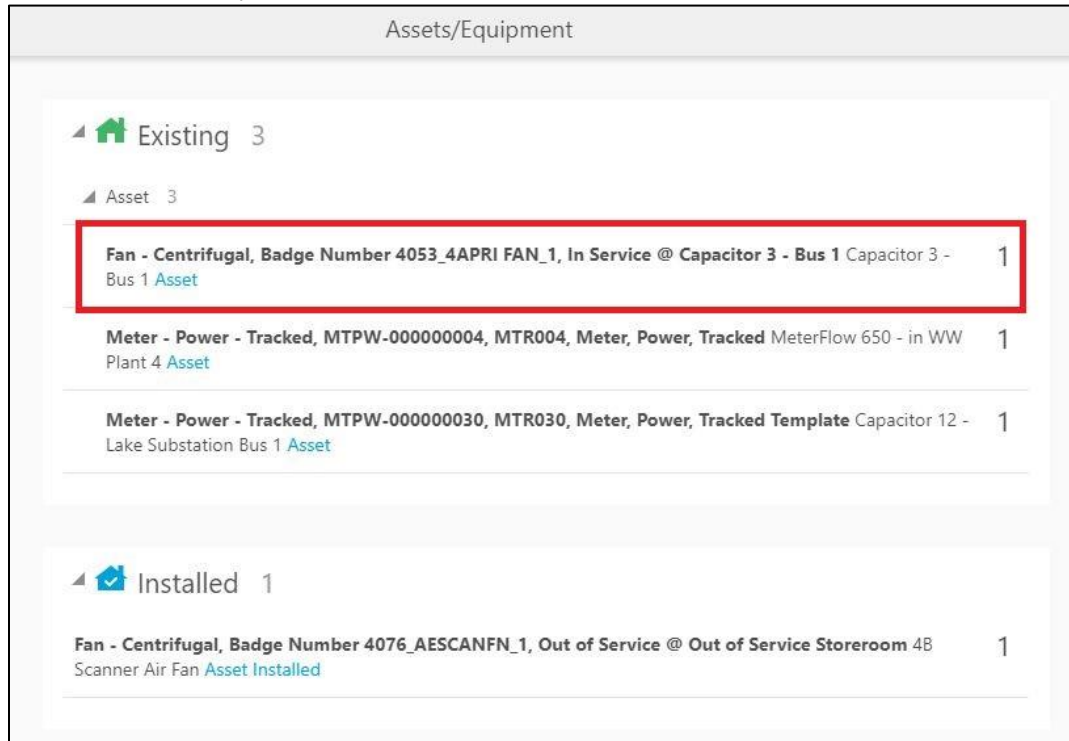
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1	Asset	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4	Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1	Asset	1

Installed 1

Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan	Asset Installed	1
---	-----------------	---

To attach a component:

1. Start the activity.
2. To **attach** a component, click the asset.



The screenshot shows the 'Assets/Equipment' page. It is divided into two sections: 'Existing' and 'Installed'. The 'Existing' section contains three assets, with the first one highlighted by a red box. The 'Installed' section contains one asset.

Asset Name	Count
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Asset	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1

Asset Name	Count
Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan Asset Installed	1



3. Click **Attach**.



The screenshot shows the 'Attach Component' dialog box. The 'Attach Component' button is highlighted with a red box. Below the dialog box, the 'Asset Details' are displayed.

Asset Information:	Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1
Badge Number:	4053_4APRI FAN_1
Asset Description:	Fan - Centrifugal
Serial Number:	S00054

4. Enter the **Badge Number** of the Component to be attached and click **Search and Add**.

Asset Operation:	Attach Component
Activity Information:	200000037/17
Main Asset Information:	Fan - Centrifugal, Badge Number 4053_4APRI_FAN, In Service @ 4A Primary Air Fan
Effective Date Time*:	11/16/2020 05:38:51 PM 
Badge Number*:	BRK-00101 
<input type="button" value="Search And Add"/> <input type="button" value="Dismiss"/>	

The attached component is shown in the **Installed Pool**.

Assets/Equipment	
Existing 3	
Asset 3	
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Asset	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1
Installed 2	
Asset 2	
Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed	1
Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan Asset Installed	1

To move an asset out of service:


1. Start the activity.
2. Click the asset to move it out of service.

Existing 3	
Asset 3	
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Asset	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1
Installed 2	
Asset 2	
Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed	1
Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan Asset Installed	1



3. Click **Out of Service**.

Remove	Out of Service	Attach Component	Replace	Follow Up Work
<p>Asset Details</p> <p>Asset Information: Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1</p> <p>Badge Number: 4053_4APRI FAN_1</p> <p>Asset Description: Fan - Centrifugal</p> <p>Serial Number: S00054</p>				
<p>Asset Location</p> <p>Location Information: Capacitor 3 - Bus 1</p> <p>Building: Lake Substation</p> <p>Run To Failure: W1NO</p> <p>Service Area: North</p>				

4. Enter the **effective date/time** and click **Submit**.





Asset Operation:	Out of Service
Activity Information:	200000037/17
Main Asset Information:	Fan - Centrifugal, Badge Number 4053_4APRI_FAN, In Service @ 4A Primary Air Fan
Effective Date Time*:	11/16/2020 05:42:52 PM 
Submit	Dismiss

The asset moves to out of service status in **Deinstalled** pool.

 Installed 2	
 Asset 2	
Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed	1
Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan Asset Installed	1
 Deinstalled 1	
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset	1

To remove an Asset/Component:

1. Start the activity.
2. Click the asset/component to be removed.

 Existing 2	
 Asset 2	
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1
 Installed 2	
 Asset 2	
Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed	1
Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan Asset Installed	1

3. Click **Remove**.

Remove Out of Service Attach Component Replace Follow Up Work

Asset Details

Asset Information: Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked

Badge Number: MTR004

Asset Description: Meter - Power - Tracked

Serial Number: MTPW-000000004

4. Enter the **effective date/time** and click **submit**.

Asset Operation: Remove Asset

Activity Information: CreateNewWO_MainPage1234

Main Asset Information: INTWAMOFSC_TrackedAsset, DEMOBADGE001, DEMOBADGE001, Demo_InstallAsset

Effective Date Time*: 11/25/2020 03:18:06 PM

Submit Dismiss

The asset/component is removed and moves to **Deinstalled** pool.

Installed 2	
Asset 2	
Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed	1
Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan Asset Installed	1
Deinstalled 2	
Asset 2	
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Removed Asset	1

To undo the installation:

1. Click the newly installed asset in the Installed pool.

Installed 2

Asset 2

Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed	1
Fan - Centrifugal, Badge Number 4076_AESCANFN_1, Out of Service @ Out of Service Storeroom 4B Scanner Air Fan Asset Installed	1

Deinstalled 2

Asset 2

Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Removed Asset	1

2. Click **Submit**.

Are you sure you want to Undo Install Asset?

Submit Dismiss

Action:	Undo Install Asset
Activity Information:	200000036/181
Asset Information:	0100006 - Truck 2, (Main Shaft - LM Wind Power), Inventory Tracked

3. Click **Undo Install Asset**.

Attach Component **Undo Install Asset** Follow Up Work New Work

Asset Details

Asset Information:	Main Shaft - Tracked, 939383333144559, MS-0004, Main Shaft - Wind Tower
Badge Number:	MS-0004
Asset Description:	Runtime Hours

The Asset/Component installation is undone and it disappears from **Installed** pool.

Existing 2	
Asset 2	
4B Scanner Air Fan	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - 1 Lake Substation Bus 1 Asset	
Installed 1	
Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed	1
Deinstalled 2	

To undo a newly attached component:

1. Click the newly attached component in the **Installed** pool.

Existing 2	
Asset 2	
4B Scanner Air Fan	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - 1 Lake Substation Bus 1 Asset	
Installed 1	
Brakes-Component, BRK-0001, BRK-0001, Brakes Capacitor 3 - Bus 1 Attached Component Installed	1

2. Click **Undo Attach Component**.
3. Click **Submit**.

The attach operation is undone and the component disappears from **Installed** pool.

Are you sure you want to Undo Attach Component? Submit Dismiss

Action: Undo Attach Component

Activity Information: 200000036/181

Component Information: 0100007 - Truck 2, (Bearing -Wind Tower Main Shaft - WinEnergy), Inventory Tracked

Undo Attach Component Follow Up Work New Work

Asset Details

Asset Information: Bearing-LG-Component-Tracked, BRG-RB-000001, BRG-RB-000001, Bearing - Main Shaft - Wind Tow

Badge Number: BRG-RB-000001

Asset Description: Runtime Hours

Attached To Asset: Main Shaft - Tracked, 939383333144559, MS-0004, Main Shaft - Wind Tower

Go to Parent Asset

Existing 2

Asset 2

4B Scanner Air Fan	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1

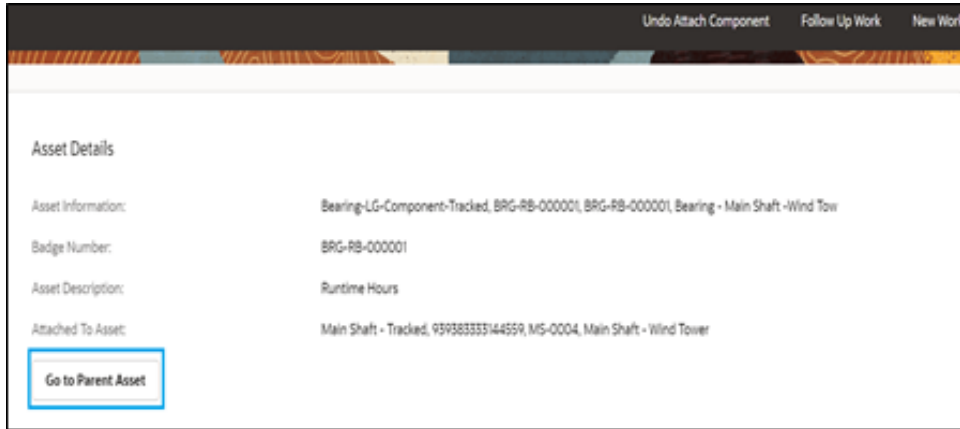
Deinstalled 2

Asset 2

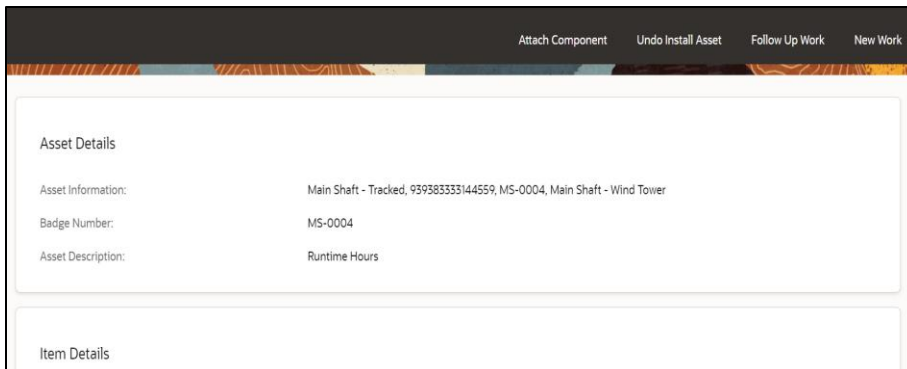
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Removed Asset	1

To navigate to the parent asset:

1. To navigate to the parent asset, click the newly attached component in the **Installed** pool.

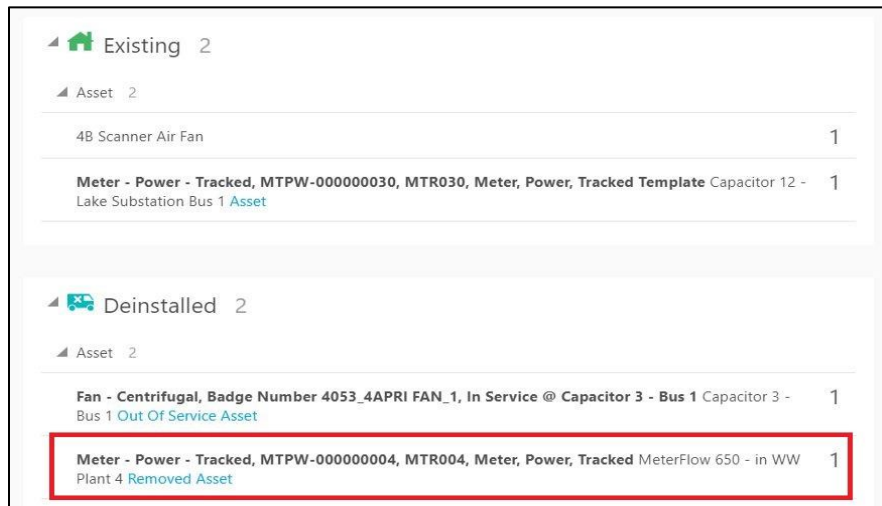


2. Click **Go to Parent Asset** to navigate to the parent asset to which the component is attached.



To undo an asset removal:

1. Click the removed asset.



2. Click **Undo Remove**.

Undo Remove Follow Up Work

Asset Details

Asset Information: Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked

Badge Number: MTR004

Asset Description: Meter - Power - Tracked

Serial Number: MTPW-000000004

Asset Location

Location Information: MeterFlow 650 - in WW Plant 4

Service Area: North

3. Click **Submit**.

Are you sure you want to undo asset removal?

Asset Operation: Undo Remove Asset

Activity Information: 200000021/97

Main Asset Information: Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked

The removal is undone and the asset disappears from the **Deinstalled** pool.

Existing 3

Asset 3

4B Scanner Air Fan	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1

Deinstalled 1

Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Out Of Service Asset	1
--	---

To move an asset back to service:

1. To move an asset back to service, click **Asset in Out of Service**.

Existing 3	
Asset 3	
4B Scanner Air Fan	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1
Deinstalled 1	
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Out Of Service Asset	1

2. Click **Back to Service**.

Back to Service	Follow Up Work								
<p>Asset Details</p> <table border="0"> <tr> <td>Asset Information:</td> <td>Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1</td> </tr> <tr> <td>Badge Number:</td> <td>4053_4APRI FAN_1</td> </tr> <tr> <td>Asset Description:</td> <td>Fan - Centrifugal</td> </tr> <tr> <td>Serial Number:</td> <td>S00054</td> </tr> </table>		Asset Information:	Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1	Badge Number:	4053_4APRI FAN_1	Asset Description:	Fan - Centrifugal	Serial Number:	S00054
Asset Information:	Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1								
Badge Number:	4053_4APRI FAN_1								
Asset Description:	Fan - Centrifugal								
Serial Number:	S00054								

3. Click **Submit**.

Are you sure you want to move asset back to service?		Submit	Dismiss
Asset Operation:	Back to Service		
Activity Information:	200000021/97		
Main Asset Information:	Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1		

The asset moves out from the **Deinstalled** pool.

Existing 4

Asset 4

4B Scanner Air Fan	1
Fan - Centrifugal, Badge Number 4053_4APRI FAN_1, In Service @ Capacitor 3 - Bus 1 Capacitor 3 - Bus 1 Asset	1
Meter - Power - Tracked, MTPW-000000004, MTR004, Meter, Power, Tracked MeterFlow 650 - in WW Plant 4 Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1

To replace an asset:

1. Click the asset which needs to be replaced.

Existing 3

Asset 3

Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component	1
Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1



2. Click **Replace**.

Remove Out of Service Attach Component **Replace** Follow Up Work

Asset Details

Asset Information:	Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template
Badge Number:	MTR021
Asset Description:	Meter - Power - Tracked
Serial Number:	MTPW-000000021

3. Enter the badge number of the asset to be replaced with and click **Search and Replace**.

Asset Operation:	Replace
Activity Information:	CreateNewWO_MainPage1234
Main Asset Information:	INTWAMOFSC_TrackedAsset, DEMOBADGE001, DEMOBADGE001, Demo_InstallAsset
Effective Date Time*:	11/25/2020 03:19:44 PM 
Badge Number*:	GEN_SR_RB_003 
<input type="button" value="Search And Replace"/> <input type="button" value="Dismiss"/>	

The new asset moves to the installed pool and the replaced asset moves to the **Deinstalled** pool.

Existing 2

- Asset 2
 - Gearbox - Component - Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 [Component](#) 1
 - Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 [Asset](#) 1

Installed 1

- Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 [Asset Installed](#) 1

Deinstalled 1

- Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 [Replaced Asset](#) 1

To replace a component:

1. Click the component to be replaced.

Existing 2

Asset 2

Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component 1

Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset 1

Installed 1

Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Asset Installed 1

Deinstalled 1

Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Replaced Asset 1

2. Click **Replace**.

Remove **Replace** Follow Up Work

Asset Details

Asset Information:	Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain
Badge Number:	GEAR-004
Asset Description:	Gearbox-Component-Tracked
Serial Number:	0000121326
Attached To Asset:	Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template

3. Enter the badge number of the replacing component and click **Search and Replace**.

Asset Operation: Replace

Activity Information: CreateNewWO_MainPage1234

Main Asset Information: INTWAMOFSC_TrackedAsset, DEMOBADGE001, DEMOBADGE001, Demo_InstallAsset

Effective Date Time*: 11/25/2020 03:19:44 PM

Badge Number*: GEN_SR_RB_003

Search And Replace Dismiss

The replaced component moves to the **Deinstalled** pool and the newly attached component moves to the **Installed** pool.

Existing 1

- Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 [Asset](#) 1

Installed 2

- Asset 2
 - Gearbox-Component-Tracked, 0000121325, GEAR-003, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component Installed** 1
 - Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 [Asset Installed](#) 1

Deinstalled 2

- Asset 2
 - Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Replaced Component** 1
 - Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 [Replaced Asset](#) 1

To undo replace an asset:

1. Click **Installed Asset/Component**.

Installed 2

- Asset 2
 - Gearbox-Component-Tracked, 0000121325, GEAR-003, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 [Component Installed](#) 1
 - Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 [Asset Installed](#)** 1

Deinstalled 2

- Asset 2
 - Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 [Replaced Component](#) 1
 - Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 [Replaced Asset](#) 1

2. Click **Undo Replace**.

Attach Component	Undo Replace	Follow Up Work
Asset Details		
Asset Information:	Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template	
Badge Number:	MTR060	
Serial Number:	MTPW-000000060	
Asset Location		
Location Information:	VFD, Pump 9, RAS, PLT5	
Service Area:	North	

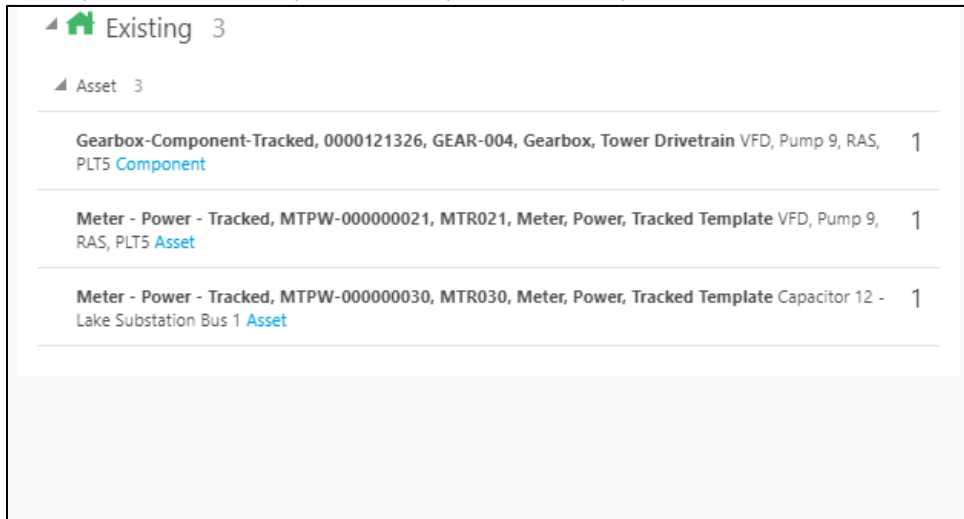
3. Click **Submit**.

Are you sure you want to undo replace?		Submit	Dismiss
Asset Operation:	Undo Replace		
Activity Information:	200000021/104		
Main Asset Information:	Meter - Power - Tracked, MTPW-000000060, MTR060, Meter, Power, Tracked Template		

The replaced asset moves back to existing pool.

Existing 2	
Asset 2	
Meter - Power - Tracked, MTPW-000000021, MTR021, Meter, Power, Tracked Template VFD, Pump 9, RAS, PLT5 Asset	1
Meter - Power - Tracked, MTPW-000000030, MTR030, Meter, Power, Tracked Template Capacitor 12 - Lake Substation Bus 1 Asset	1
Installed 1	
Gearbox-Component-Tracked, 0000121325, GEAR-003, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Component Installed	1
Deinstalled 1	
Gearbox-Component-Tracked, 0000121326, GEAR-004, Gearbox, Tower Drivetrain VFD, Pump 9, RAS, PLT5 Replaced Component	1

4. Repeat the above steps to undo replace for a component.

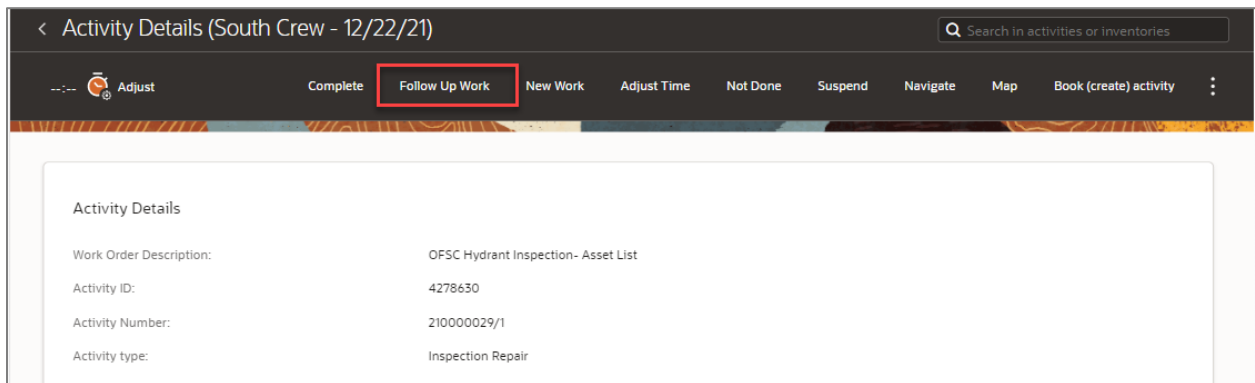


Pick Up and Follow Up Orders

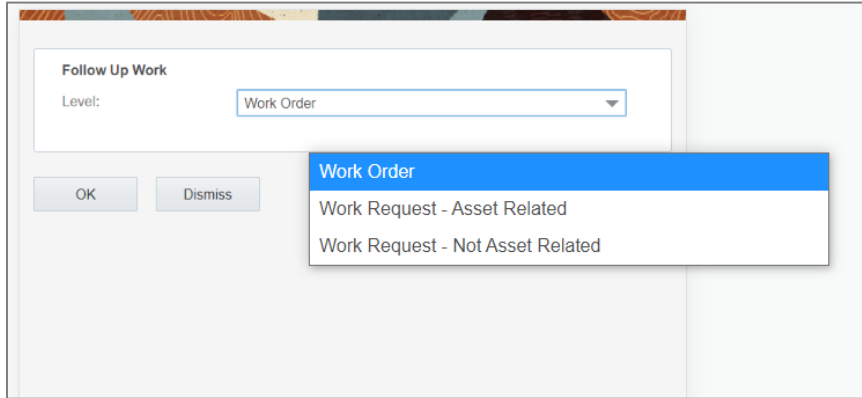
Follow Up orders are created for a new work related to the activity crew is working at. Follow up work can include Work Orders and Work Requests.

To create a Follow Up order:

1. Navigate to the **Activity Details** page and click **Follow Up Work**.



2. Select the type of Follow Up work to be created.



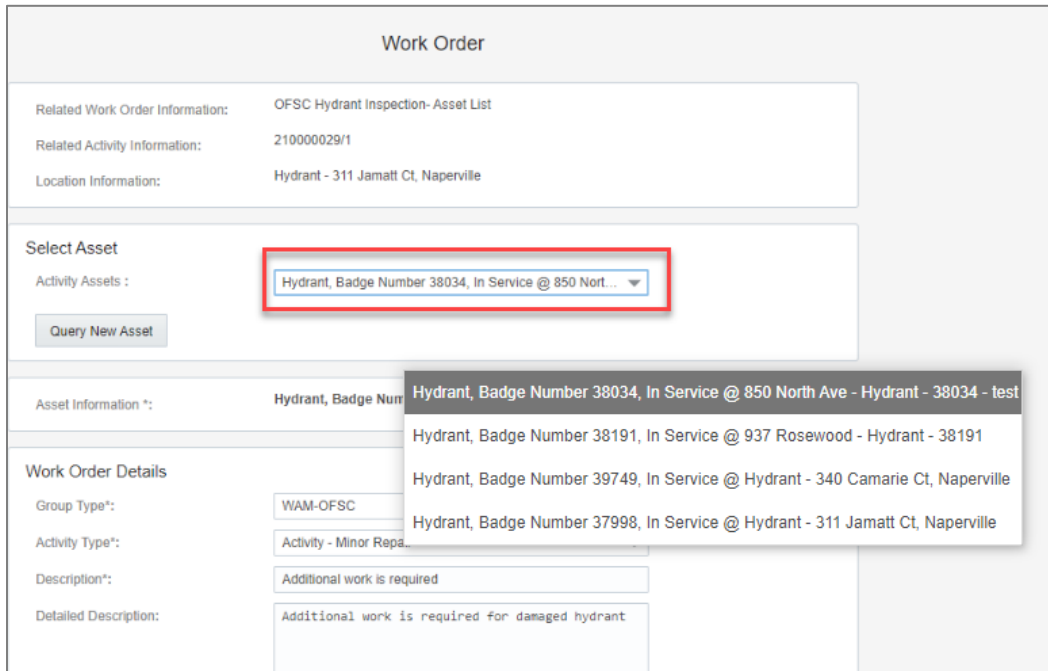
3. Click **OK**.

Follow Up Work Order

Creating a Follow Up Work Order will result in the creation of field activity in Oracle Field Service Cloud and the related work order in Asset Management solution.

To create a Follow Up Work Order for one of the assets related to activity or for a new asset:

1. To select an asset linked to the existing activity, click the **Activity Asset** drop-down and select an asset from the list.



2. To select a different asset, click **Query New Asset**.

Work Order

Related Work Order Information:	OFSC Hydrant Inspection- Asset List
Related Activity Information:	21000029/1
Location Information:	Hydrant - 311 Jamatt Ct, Naperville

Select Asset

Activity Assets :

This will launch a search against Asset Management solution.

Asset Query

Badge Number:	<input type="text"/>
Location	
Location Type :	<input type="text"/>
Address:	<input type="text"/>
City:	<input type="text"/>
Postal:	<input type="text"/>
Building:	<input type="text"/>
Description:	<input type="text"/>

3. Enter search criteria and click **Search**.

Asset Query

Badge Number:

Location

Location Type :

Address:

City:

Postal:

Building:

Description:

Search Results

- Breaker, Badge Number REC001, In Service @ Pole - Ft Pierce, N 7th St. SWC A E Backus Ave. - 21205A Pole - Ft Pierce, N 7th St. SWC A E Backus Ave. - 21205A
- Breaker, Badge Number REC002, In Service @ Pole - Ft Pierce, N 7th St. at A E Backus Ave. - 21203 Pole - Ft Pierce, N 7th St. at A E Backus Ave. - 21203
- Breaker, Badge Number REC003, In Service @ Pole - Ft Pierce, N 7th St. 1PN Ave. C - 21206 Pole - Ft Pierce, N 7th St. 1PN Ave. C - 21206
- Breaker, Badge Number REC004, In Service @ Pole - Ft Pierce, A E Backus Ave 2PE N 7th St - 21202 Pole - Ft Pierce, A E Backus Ave 2PE N 7th St - 21202
- Breaker, Badge Number REC005, In Service @ Pole - Ft Pierce, Ave B 2PW N 7th St - 20883 Pole - Ft Pierce, Ave B 2PW N 7th St - 20883
- Hydrant, Badge Number 38034, In Service @ 850 North Ave - Hydrant - 38034 - test 850 North Ave - Hydrant - 38034 - test
- Hydrant, Badge Number 38191, In Service @ 937 Rosewood - Hydrant - 38191 937 Rosewood - Hydrant - 38191
- Hydrant, Badge Number 41874, In Service @ 929 Rosewood - Hydrant - 41874 929 Rosewood - Hydrant - 41874
- Pole - Wood, Badge Number 3547, In Service @ Pole - Ft Pierce, Backus - 3547 Pole - Ft Pierce, Backus - 3547

4. Select an asset for which the work order should be created.
5. Enter details related to the Follow Up Work Order and click **Create**.

Work Order

Related Work Order Information:	OFSC Hydrant Inspection- Asset List
Related Activity Information:	210000029/1
Location Information:	Hydrant - 311 Jamalf Ct, Naperville

Select Asset

Activity Assets : Hydrant, Badge Number 38034, In Service @ 850 Nort ...

Asset Information * : Hydrant, Badge Number 38034, In Service @ 850 North Ave - Hydrant - 38034 - test

Work Order Details

Group Type*: WAM-OFSC

Activity Type*: Activity - Minor Repair

Description*: Additional work is required

Detailed Description:

Additional work is required for damaged hydrant

Work Priority*: 6 - High

Work Class: Operational

Work Category: Operations

Work Type*: Regular

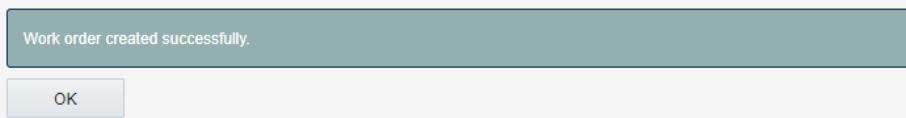
Required By Date: mm/dd/yyyy

Emergency:

Work It:

A new activity is created in Oracle Field Service Cloud and a new related Work Order is created in the Asset Management solution.

6. Click **OK**.



You can select the **Work It** option to assign a new activity to the crew.

Follow Up Work Request

Creating a Follow Up Work Order will result in creation of a work request in the Asset Management solution.

Note that a work request can be asset related and non-asset related.

Asset Related Work Request

Asset related work requests are created for assets.

You can specify one of the assets linked to the activity or query asset from the Asset Management solution.

Work Request - Asset Related

Related Work Order Information: OFSC Hydrant Inspection- Asset List

Related Activity Information: 210000029/1

Location Information: Hydrant - 311 Jamatt Ct, Naperville

Select Asset

Activity Assets :

Query New Asset

Hydrant, Badge Number 37998, In Service @ Hydrant ...▼

Hydrant, Badge Number 38034, In Service @ 850 North Ave - Hydrant - 38034 - test

Hydrant, Badge Number 38191, In Service @ 937 Rosewood - Hydrant - 38191

Hydrant, Badge Number 39749, In Service @ Hydrant - 340 Camarie Ct, Naperville

Hydrant, Badge Number 37998, In Service @ Hydrant - 311 Jamatt Ct, Naperville

Asset Information *:

Work Request Details

Description*:

Detailed Description:

Work Priority*:

Work Class:

Work Category:

Required By Date: 📅

Downtime Start Date/Time: 📅

Create

Dismiss

Enter the required information and click **Create**. A new work request will be created and sent to the Asset Management solution.

Non-Asset Related Request

A non-asset related request is not linked to any asset and does not contain any asset information.

Work Request - Asset Related

Related Work Order Information:	OFSC Hydrant Inspection- Asset List
Related Activity Information:	210000029/1
Location Information:	Hydrant - 311 Jamatt Ct, Naperville

Select Asset

Activity Assets :

Asset Information *:	Hydrant, Badge Number 38191, In Service @ 937 Rosewood - Hydrant - 38191
----------------------	--

Work Request Details

Description*:	<input type="text" value="Additional work is needed for hydrant"/>
Detailed Description:	<input type="text" value="Additional materials and parts are required to fix the hydrant"/>
Work Priority*:	<input type="text" value="6 - High"/>
Work Class:	<input type="text" value="Operational"/>
Work Category:	<input type="text" value="Operations"/>
Required By Date:	<input type="text" value="mm / dd / yyyy"/>
Downtime Start Date/Time:	<input type="text" value="mm / dd / yyyy --:-- --"/>

Work Request created successfully.

OK

Work requests created by crew can be found on crew the **Request History**.

Adjust Start

Activity - Minor Repair Additional Work is needed

Travel Time 0:15

Inspection Repair 200000054/1 12/23/21 12:58 AM

Navigate

Inspection Repair 210000031/1 12/23/21 02:00 AM

Navigate

Vehicle Maintenance All-Day

My Route

100% 4 Pending

My Team

South Crew

- BB Boris Boring Route is not activated
- CROSBY, Andrew
- CRANE, Tim
- KC Karen Crane Route is not activated
- MB Maintenance 1 Bucket Truck - Electric Route is not activated
- MB Maintenance 2 Bucket Truck - Electricity Route is not activated

Activities Start Activity

Options Requests History

New Work Inventory

History 2

Work Request 12/23/21 04:55 PM , Description: Not asset related request , Related Activity Info: 200000054/1

Work Request 12/22/21 06:57 PM , Description: Additional work is needed for hydrant , Asset Info: Hydrant, Badge Number 38191, In Service @ 937 Rosewood - Hydrant - 38191 , Location Info: 937 Rosewood - Hydrant - 38191 , Related Activity Info: 210000029/1

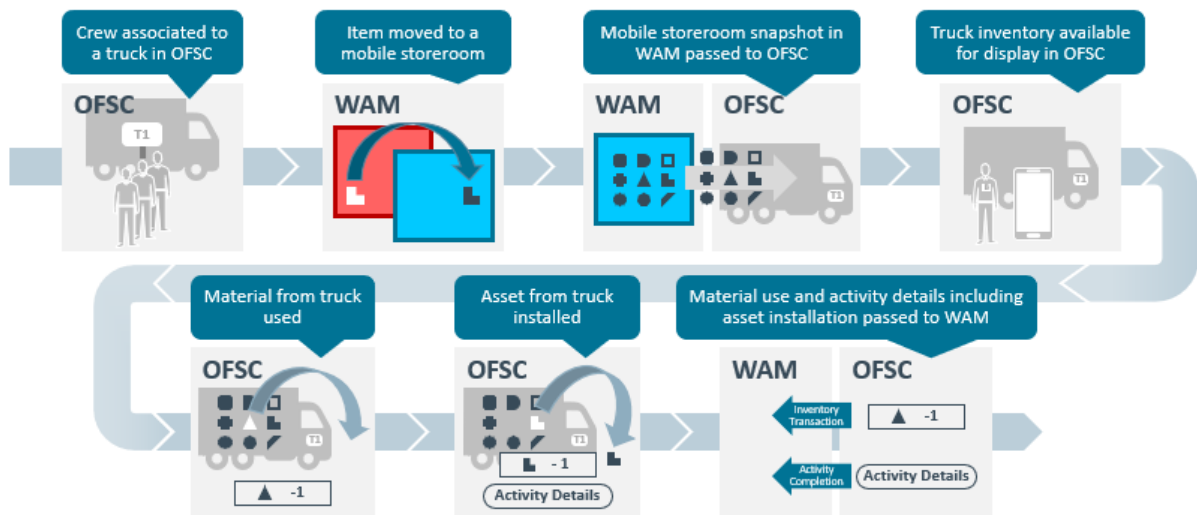
Mobile Inventory Management

Mobile inventory management supports truck storerooms that contain assets and materials.

Overview

The Mobile Inventory Management functionality includes:

- Sending mobile storeroom content details from Oracle Utilities Work and Asset Cloud Service to Oracle Field Service Cloud
- Viewing the contents of a truck in a handheld device
- Recording the use of an item for an activity in a handheld device
- Updating content of Oracle Field Service Cloud truck for additional inventory
- Passing the use of items from Oracle Field Service Cloud to Oracle Utilities Work and Asset Cloud Service



Mobile Inventory Management – Truck Inventory

Mobile storerooms (trucks) and their inventories are managed in Oracle Utilities Work and Asset Cloud Service. A truck in Oracle Field Service Cloud is linked to a Oracle Utilities Work and Asset Cloud Service mobile storeroom.

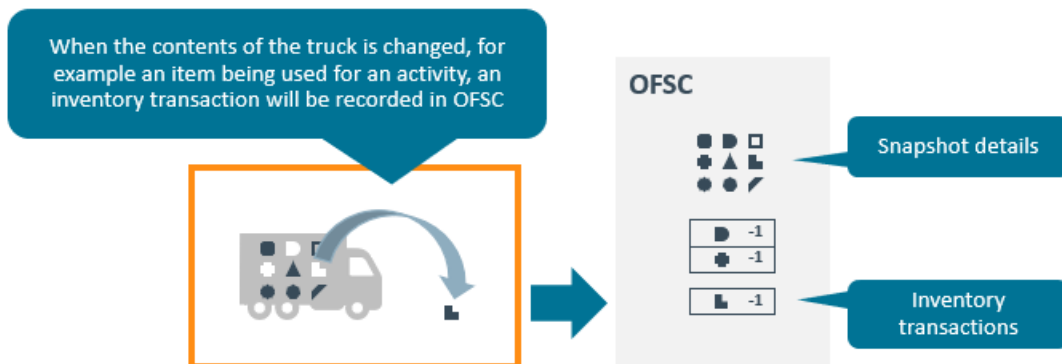
On request, the contents of the Oracle Utilities Work and Asset Cloud Service mobile storeroom is passed to Oracle Field Service Cloud and the contents of the linked Oracle Field Service Cloud truck is updated.



Mobile Storeroom Snapshot - Passing mobile storeroom content to OFSC

Loading the snapshot of the Oracle Utilities Work and Asset Cloud Service Mobile Storeroom linked to a truck should occur prior to or at the beginning of the relevant crew's shift. When a mobile storeroom snapshot is loaded into Oracle Field Service Cloud the contents of the linked Oracle Field Service Cloud truck is replaced with the details recorded in Oracle Utilities Work and Asset Cloud Service.

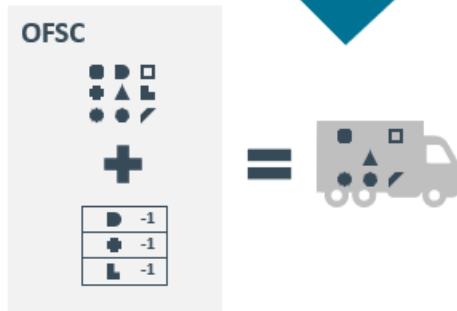
A crew can install assets and use material from their trucks for the activities they are working on. These truck inventory transitions are recorded in Oracle Field Service Cloud.



Truck Inventory in OFSC - Inventory transactions

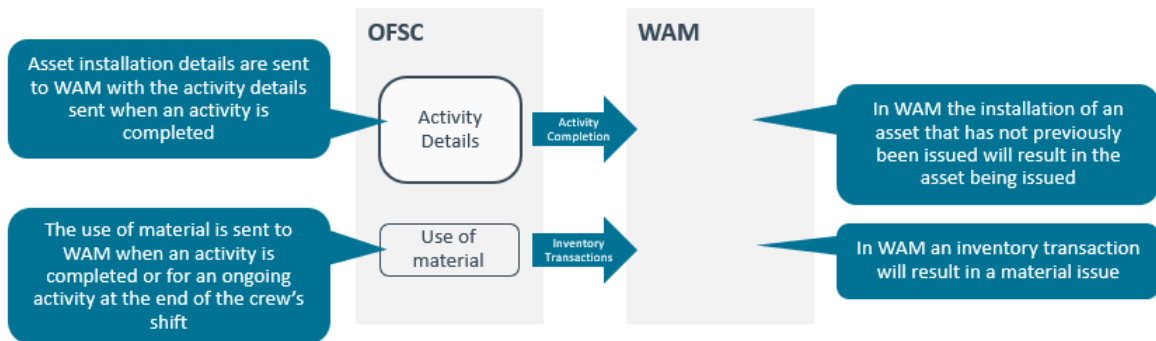
The content of the truck is the combination of the last mobile storeroom snapshot and the inventory transactions that have occurred since the last snapshot.

The current contents of a truck is the sum of the snapshot details and the inventory transactions



Truck Inventory in OFSC - Current truck contents

On activity completion and at the end of crew shift the use of assets and materials is sent to Oracle Utilities Work and Asset Management and the inventory of the mobile storeroom linked to the truck is updated.



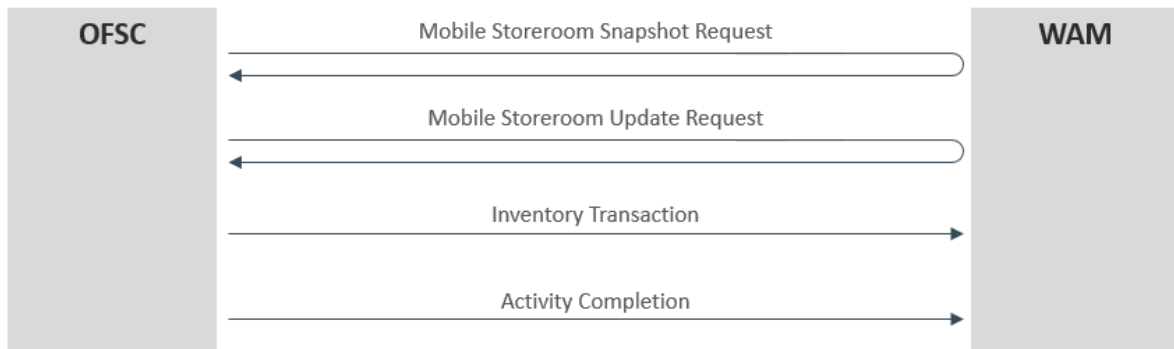
Updating WAM - Inventory transactions for material sent separately to the activity completion

During a crew's shift, the inventory of the crew's truck could get updated. For example, additional items required for an activity could be picked up from a storeroom. These updates will be recorded in Oracle Utilities Work and Asset Cloud Service. In order to update the truck's inventory in Oracle Field Service Cloud, the crew requests an update of the truck inventory.



Mobile Storeroom Update - Passing an update of mobile storeroom content to OFSC

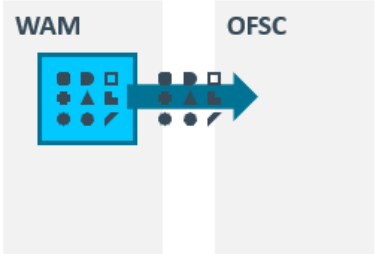
The following diagram represents integration flows for mobile inventories movement.



Truck Materials Lifecycle Examples

Truck Content Example - Snapshot at the start of the shift

1 At the start of a crew's shift a snapshot of the WAM storeroom for the crew's truck is passed to OFSC



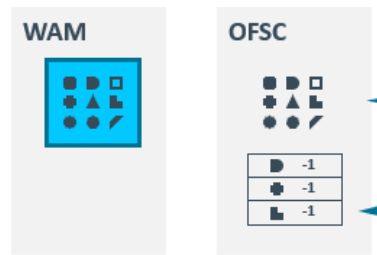
Truck content shown in handheld



The truck content displayed in the OFSC handheld is equal to the snapshot

Truck Content Example - Items used in the field

2 Three items are used in the field for an activity



Snapshot of storeroom contents

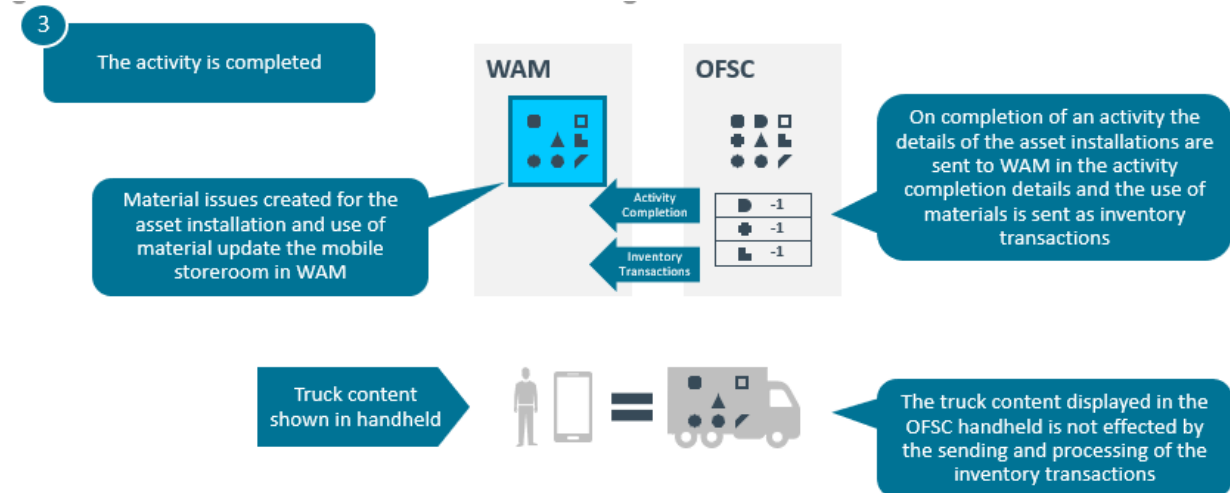
Inventory transactions within OFSC record the item that have been used

Truck content shown in handheld



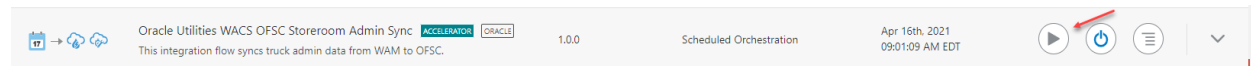
The truck content displayed in the OFSC handheld is equal to the snapshot plus the inventory transactions

Truck Content Example - WAM updated with item use



Truck Storeroom Admin Sync

This integration process passes storeroom data from Oracle Utilities Work and Asset Cloud Service to Oracle Field Service Cloud for the storerooms with a storeroom type whose storeroom category is Truck.



Truck Storerooms in Oracle Utilities Work and Asset Cloud Service

	LOCATION	LOCATION TYPE	ADDRESS
1	Maintenance 1 Bucket Truck - Electric	Truck Storeroom	Maintenance 1 Bucket Truck
2	Maintenance 2 Bucket Truck - Electricity	Truck Storeroom	Maintenance 2 Bucket Truck
3	Maintenance 3 Crew Truck - Water	Truck Storeroom	Maintenance 3 Crew Truck
4	Maintenance 4 Crew Truck - Water	Truck Storeroom	Maintenance 4 Crew Truck

Trucks created by the integration in Oracle Field Service Cloud



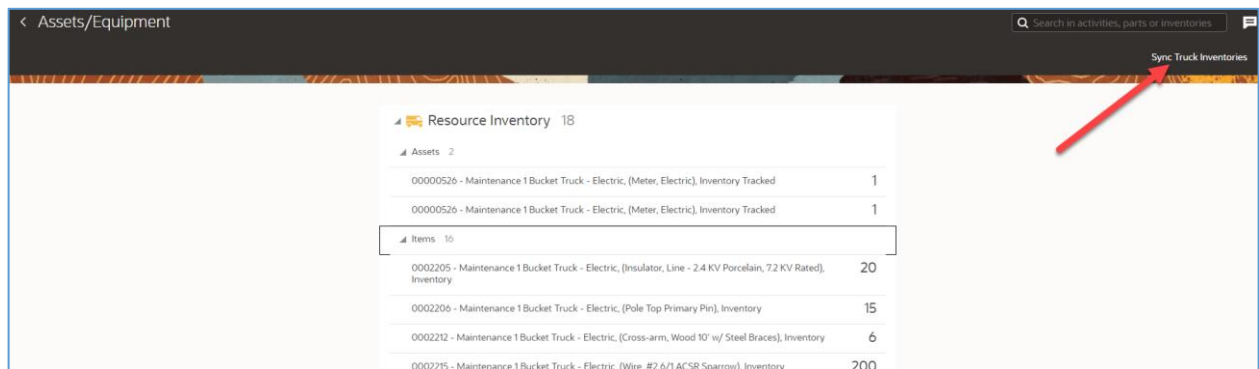
Truck Inventory Snapshot

This process passes the inventory of a truck storerooms from Oracle Utilities Work and Asset Cloud Service to Oracle Field Service Cloud updating the inventory of the Oracle Field Service Cloud truck that is linked to the Oracle Utilities Work and Asset Cloud Service storeroom.

Attention! This process will delete the content of the Oracle Field Service Cloud truck and replace it with the content of the linked storeroom in Oracle Utilities Work and Asset Cloud Service. Any unprocessed inventory transaction in Oracle Field Service Cloud, that is used assets or materials will be lost.

The Truck Inventory Snapshot can be performed using one of the following three options:

- Option 1: On Route Activation
 - On route activation of a crew or individual, Oracle Field Service Cloud checks if there are any trucks associated with that crew or individual. If there are any, it initiates the truck inventory snapshot process.
- Option 2: Scheduled Truck Inventory Snapshot
 - A batch scheduled in Oracle Integration Cloud to run at a specific time initiates the truck inventory snapshot process for all truck storerooms.
- Option 3: On Request
 - The truck inventory snapshot process can be initiated by a dispatcher from the Truck Resource Inventory. This option can be used for exceptional situations



Assigning Truck to Crews

A truck is assigned to a crew or individual. Once a truck is assigned its contents is available to be used for the activities the crew or individual is working on.

In the example below, two trucks have been assigned to South Crew.

South Crew ★ 👤 📅

OH Operations > Crews

Team

- 👤 Boris Boring (01:00 PM - 05:00 PM)
- 👤 CROSBY, Andrew
- 👤 CRANE, Tim (09:00 AM - 06:00 PM)
- 👤 Karen Crane
- 🚚 Maintenance 1 Bucket Truck - Electric
- 🚚 Maintenance 2 Bucket Truck - Electricity

Name South Crew

External ID SOUTHCREW

Queue status activated at 01/11/22 12:17 PM

Total 1

Pending 1

Calendar 09 AM - 06 PM

The inventory of these trucks is available to the crew member in the mobile application.

ORACLE 🔍 Search in activities 🗨️ 👤

My Team 👥

- SC** South Crew >
 - 👤 CRANE, Tim
 - 👤 Boris Boring
Route is not activated
 - 👤 CROSBY, Andrew
Route is not activated
 - 👤 Karen Crane
Route is not activated
 - 🚚 Maintenance 1 Bucket Truck - E
Route is not activated
 - 🚚 Maintenance 2 Bucket Truck - I
Route is not activated

Activities 📄 Start Activity ➕

Options ⚙️ Requests History 📄

New Work 📄 **Inventory** 🚚

Existing 4

Asset 4

Hydrant, Badge Number 37998, In Service @ Hydrant - 311 Jamatt Ct, Naperville Hydrant - 311 Jamatt Ct, Naperville Asset	1
Hydrant, Badge Number 38034, In Service @ 850 North Ave - Hydrant - 38034 - test 850 North Ave - Hydrant - 38034 - test Asset	1
Hydrant, Badge Number 38191, In Service @ 937 Rosewood - Hydrant - 38191 937 Rosewood - Hydrant - 38191 Asset	1
Hydrant, Badge Number 39749, In Service @ Hydrant - 340 Camarie Ct, Naperville Hydrant - 340 Camarie Ct, Naperville Asset	1

Maintenance 1 Bucket Truck - Electric 18

Assets 2

00000526 (Meter, Electric) MTR003	1
00000526 (Meter, Electric) MTR005	1

Items 16

0002205 (Insulator, Line - 2.4 KV Porcelain, 7.2 KV Rated)	20
0002206 (Pole Top Primary Pin)	15
0002212 (Cross-arm, Wood 10' w/ Steel Braces)	6
0002215 (Wire, #2 6/1 ACSR Sparrow)	200
0002216 (Anchor, Rod 1" X 7')	2

Using Inventories for Activities

You can see truck inventories on the activity's **Asset** tab.

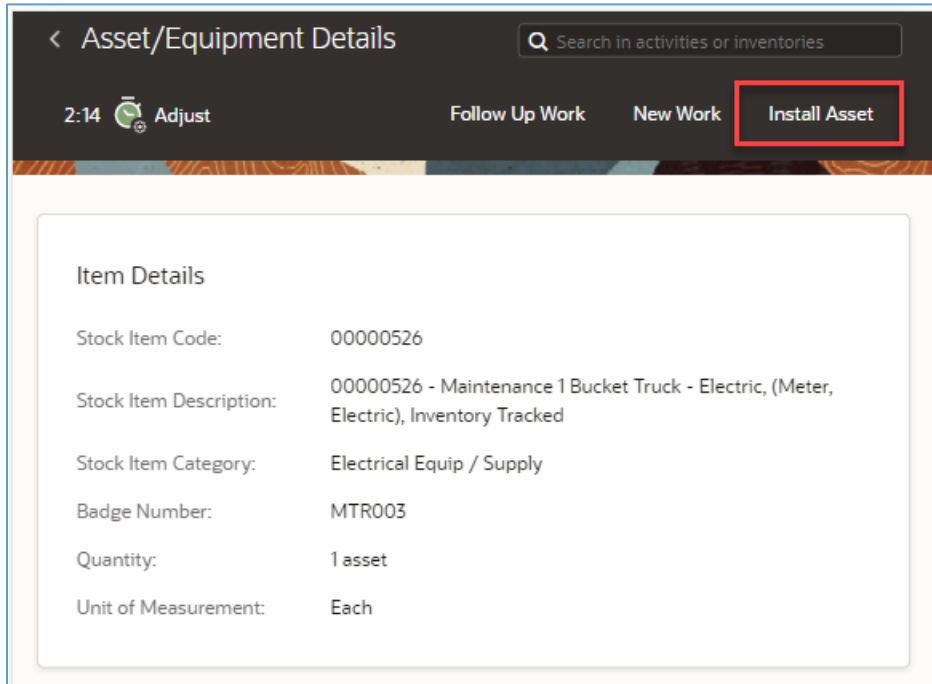
There are two types of items in a truck's inventory: assets and materials.

Existing 4	
▲ Asset 4	
Hydrant, Badge Number 37998, In Service @ Hydrant - 311 Jamatt Ct, Naperville Hydrant - 311 Jamatt Ct, Naperville Asset	1
Hydrant, Badge Number 38034, In Service @ 850 North Ave - Hydrant - 38034 - test 850 North Ave - Hydrant - 38034 - test Asset	1
Hydrant, Badge Number 38191, In Service @ 937 Rosewood - Hydrant - 38191 937 Rosewood - Hydrant - 38191 Asset	1
Hydrant, Badge Number 39749, In Service @ Hydrant - 340 Camarie Ct, Naperville Hydrant - 340 Camarie Ct, Naperville Asset	1
▲ 🚚 Maintenance 1 Bucket Truck - Electric 18	
▲ Assets 2	
00000526 (Meter, Electric) MTR003	1
00000526 (Meter, Electric) MTR005	1
▶ Items 16	

Assets

You can install an asset in a truck's inventory at a location associated with the activity being worked on.

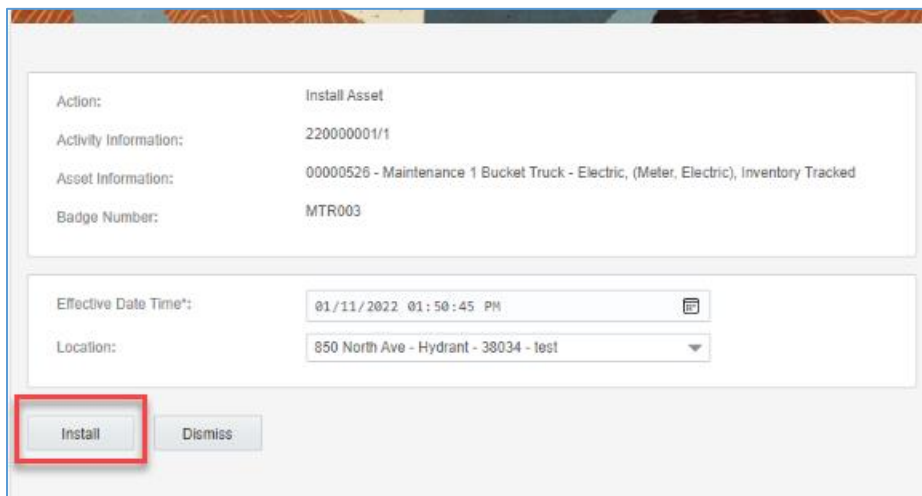
1. Select the asset you want to install and click **Install Asset**.



The screenshot shows the 'Asset/Equipment Details' interface. At the top, there is a search bar and navigation options: 'Adjust', 'Follow Up Work', 'New Work', and 'Install Asset'. The 'Install Asset' button is highlighted with a red box. Below the navigation bar, the 'Item Details' section contains the following information:

Stock Item Code:	00000526
Stock Item Description:	00000526 - Maintenance 1 Bucket Truck - Electric, (Meter, Electric), Inventory Tracked
Stock Item Category:	Electrical Equip / Supply
Badge Number:	MTR003
Quantity:	1 asset
Unit of Measurement:	Each

2. If there is more than one location associated with the activity, select the location and if the necessary Adjust the installation date and time.



The screenshot shows the 'Install Asset' confirmation dialog. It contains the following information:

Action:	Install Asset
Activity Information:	22000001/1
Asset Information:	00000526 - Maintenance 1 Bucket Truck - Electric, (Meter, Electric), Inventory Tracked
Badge Number:	MTR003

Below this information, there are two input fields:

Effective Date Time*:	01/11/2022 01:50:45 PM
Location:	850 North Ave - Hydrant - 38034 - test

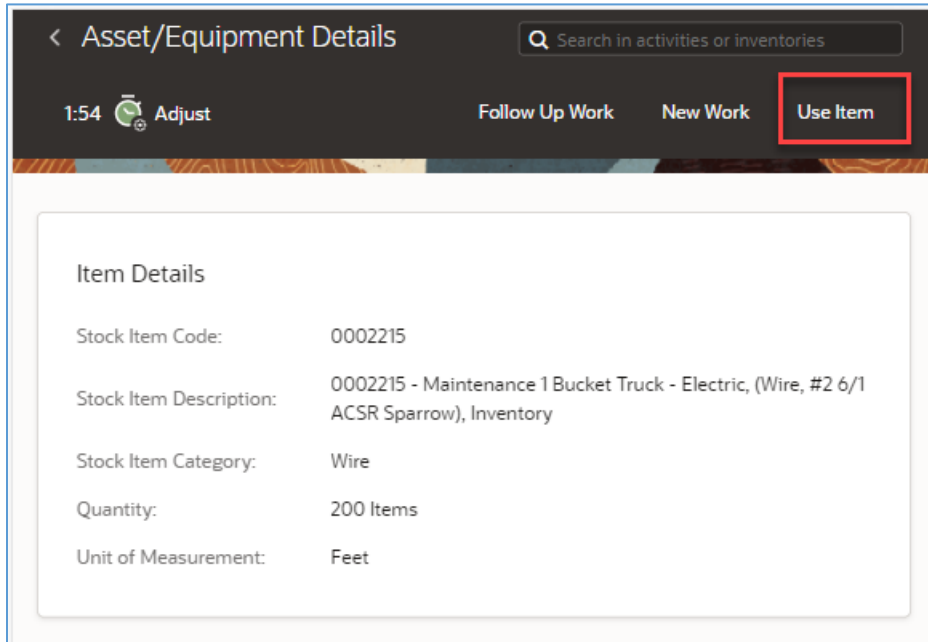
At the bottom, there are two buttons: 'Install' and 'Dismiss'. The 'Install' button is highlighted with a red box.

An asset will be installed at the location.

Materials

You can report material that have been used for an activity.

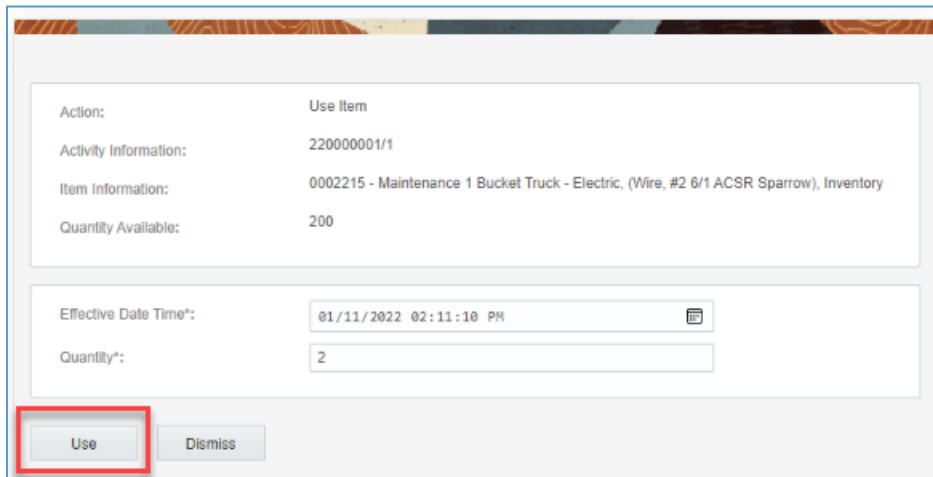
1. Select the item you want to use and click **Use Item**.



The screenshot shows the 'Asset/Equipment Details' screen. At the top, there is a search bar with the text 'Search in activities or inventories'. Below the search bar, there are three buttons: 'Adjust', 'Follow Up Work', and 'New Work'. The 'Use Item' button is highlighted with a red box. Below the buttons, there is a section titled 'Item Details' with the following information:

Stock Item Code:	0002215
Stock Item Description:	0002215 - Maintenance 1 Bucket Truck - Electric, (Wire, #2 6/1 ACSR Sparrow), Inventory
Stock Item Category:	Wire
Quantity:	200 Items
Unit of Measurement:	Feet

2. Specify the number of items used and click **Use**.



The screenshot shows the 'Use Item' dialog box. It contains the following information:

Action:	Use Item
Activity Information:	220000001/1
Item Information:	0002215 - Maintenance 1 Bucket Truck - Electric, (Wire, #2 6/1 ACSR Sparrow), Inventory
Quantity Available:	200

Below this information, there are two input fields:

Effective Date Time*:	01/11/2022 02:11:10 PM
Quantity*:	2

At the bottom of the dialog box, there are two buttons: 'Use' and 'Dismiss'. The 'Use' button is highlighted with a red box.

The used items will appear in the **Installed** section.

Category	Count
Existing	4
Asset	4
Hydrant, Badge Number 37998, In Service @ Hydrant - 311 Jamatt Ct, Naperville Hydrant - 311 Jamatt Ct, Naperville Asset	1
Hydrant, Badge Number 38034, In Service @ 850 North Ave - Hydrant - 38034 - test 850 North Ave - Hydrant - 38034 - test Asset	1
Hydrant, Badge Number 38191, In Service @ 937 Rosewood - Hydrant - 38191 937 Rosewood - Hydrant - 38191 Asset	1
Hydrant, Badge Number 39749, In Service @ Hydrant - 340 Camarie Ct, Naperville Hydrant - 340 Camarie Ct, Naperville Asset	1
Installed	1
0002215 (Wire, #2 6/1 ACSR Sparrow)	2
Maintenance 1 Bucket Truck - Electric	18
Assets	2
00000526 (Meter, Electric) MTR005	1
00000526 (Meter, Electric) MTR005	1
Items	16
0002205 (Insulator, Line - 2.4 KV Porcelain, 7.2 KV Rated)	20

Update Truck Inventories

During a crew's shift the contents of a truck could be changed and the changes recorded in Oracle Utilities Work and Asset Cloud Service. For example: Items could be added to a truck from a standard storeroom. The inventory could be changed. In this situation, a truck inventory update should be requested from Oracle Field Service Cloud.

On receipt of a truck inventory update request, Oracle Utilities Work and Asset Cloud Service returns the inventory changes to the trucks storeroom contents since the last snapshot. Changes to the Oracle Utilities Work and Asset Cloud Service contents resulting from inventory transactions passed from Oracle Field Service Cloud are excluded.

To trigger a truck inventory update, click **Update Truck Inventory** on the **Asset** tab.

Existing 4

Asset 4

Hydrant, Badge Number 37998,
In Service @ Hydrant - 311
Jamatt Ct, Naperville
Hydrant - 311 Jamatt Ct,
Naperville [Asset](#)

1

Hydrant, Badge Number
38034, In Service @ 850 North
Ave - Hydrant - 38034 - test
850 North Ave - Hydrant -
38034 - test [Asset](#)

1

Chapter 5: Customizations

Adding new properties according to the requirement and customizations help customers to enhance the functionality of the integration and increase the usability. The customizations are done in Oracle Integration Cloud, Oracle Field Service Cloud, and Oracle Utilities Customer Cloud Service depending on the fields, elements, or properties to be added and whether they are available.

This chapter focuses on a few cases about customizations.

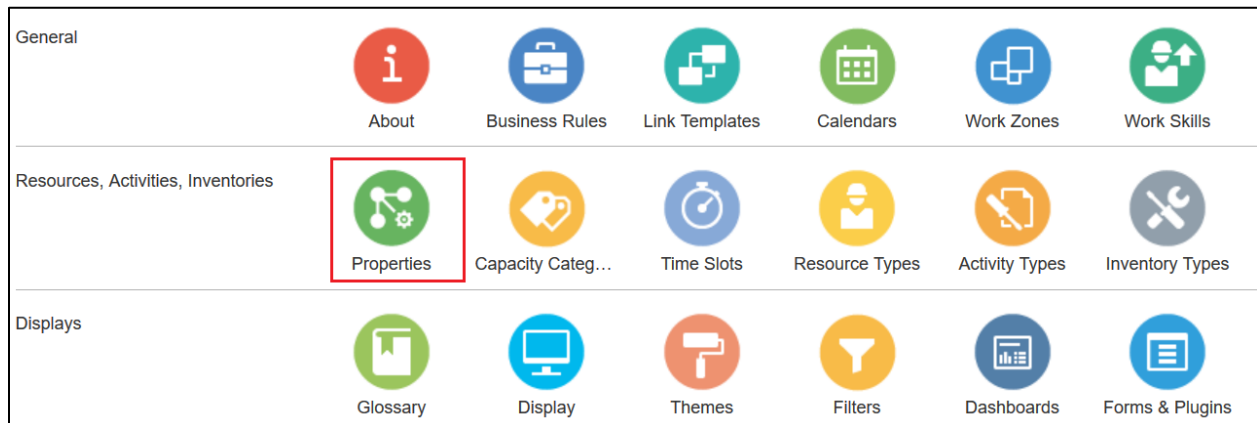
- [Adding New Fields to Field Activity](#)
- [Adding Custom Business Objects](#)
- [Plugins Rendering Data](#)
- [Validation for Completion](#)

Adding New Fields to Field Activity

This section provides the steps to add a new field to the field activity already available but not present in the field activity.

Oracle Field Service Cloud Configurations

1. Login to Oracle Field Service Cloud.
2. Navigate to **Configuration > Resources, Activities, Inventories > Properties**.



3. Enter the **Property name** and **Property Label**.
4. Select the entity, type of GUI, and add the enumeration values “customprop1” and “customprop2”.

Modify Property

Property type: Enumeration

* Property name

* English: Test Custom Property

SpanishLA:

Portuguese (Brazil):

* Property Label: test_customproperty

Property hint

English:

SpanishLA:

Portuguese (Brazil):

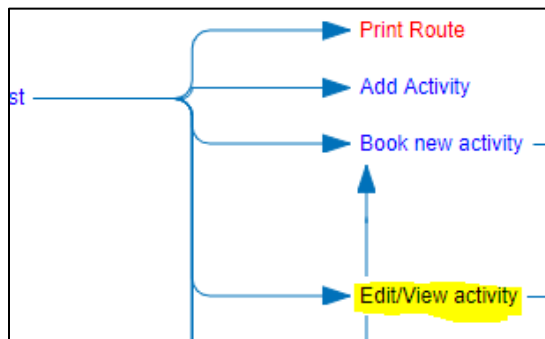
Entity: Activity

GUI: Combobox Radiogroup

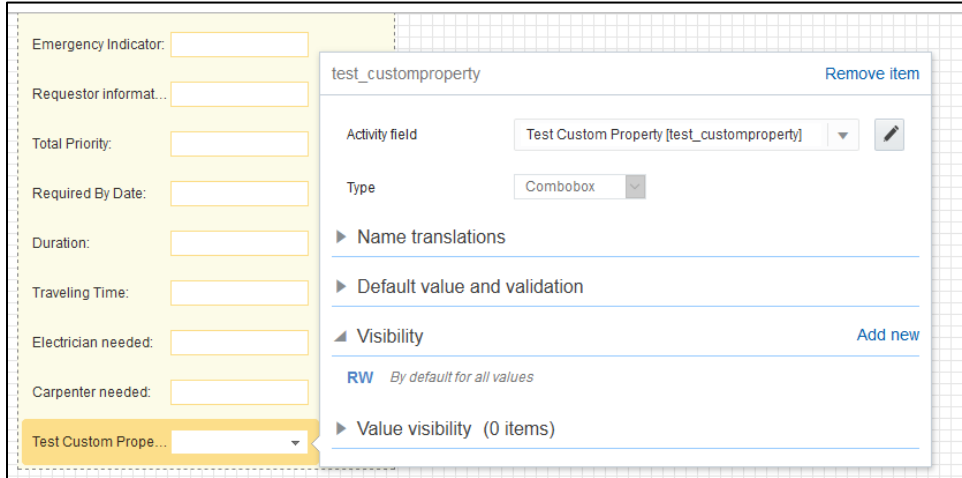
Clone property data on Reopen or Prewrite:

Enumeration values

5. Navigate to **Configuration > Users, Security, Integrations > User Types** and select the required user type.
6. Navigate to the Screen configurations for the select user type and open the **Edit/View activity** section.



7. Add a new element by dragging and dropping a new 'Input' from the **Add New Element** section.
8. Map the element to the **Test Custom Property**. Save this configuration after mapping the field.

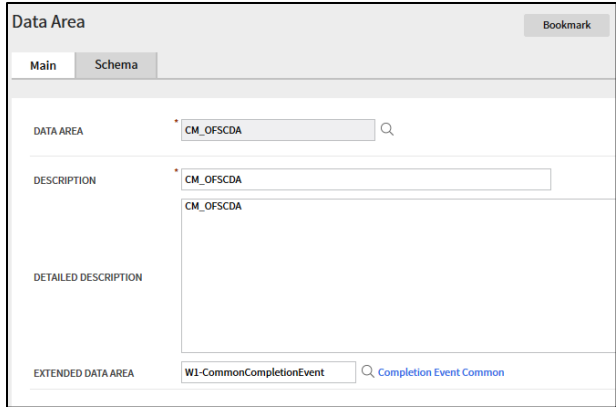


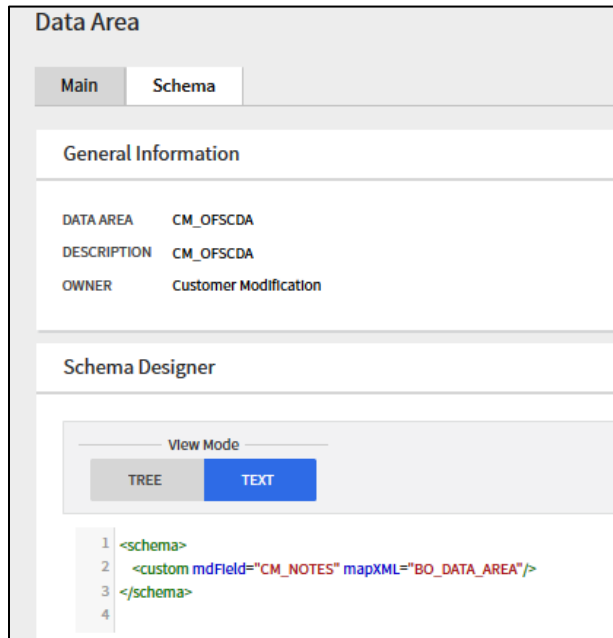
Oracle Utilities Work and Asset Cloud Service Configurations

1. Login to Oracle Utilities Work and Asset Cloud Service.
2. To configure with a new schema element:
 - a. Navigate to the W1-ActivityComplInboundComm business object.
 - b. Identify the data area to add the new schema element.

Example: To make changes to the Completion Event Details section, the data area to be changed is the custom data area created for Oracle Field Service Cloud.

- c. Extend the data area. Add the completion event details data area in the **Extended Data Area** field.





d. The new schema element is displayed in the business object schema.



Adding Custom Business Objects

After a custom business object for a service history is added in Oracle Utilities Work and Asset Management, the information is available to Service History plugin along with all other service histories as part of “wam_asset_valid_service_history_types” property.

In Oracle Field Service Cloud the new business object value is added as an enumeration value in “wam_service_history_bo” property.

If the new business object belongs to one of the predefined service history categories of Questionnaire, Inspection, Failure, Downtime and General, it is defined as such in the property. For example: A custom business object “CM_Downtime” is entered in the “wam_service_history_bo” property as shown below. The service history plugin will automatically handle the new business object.

If the new business object entered does not fall into any of the predefined service history categories, after the “wam_service_history_bo” property is updated, the service history plugin javascript should be updated to handle the new service history category. Create a new XSL that needed for the UI of the new service history category to be added.

Plugins Rendering Data

This section explains how each plugin renders the data.

Measurements

- Valid measurement types received from Oracle Utilities Work and Asset Clod Service are assigned to “wam_valid_measurement_types” property and are obtained in runtime as XML string and displayed in plugin.
- The individualMeasurementType-to-form.xsl and individualMeasurementTypeEdit-to-form.xsl are used to style the UI forms to add and update measurement information.
- The measurement information is consolidated into “wam_measurements_output” property and made available for validateCompletion plugin.
- Measurement reason types (wam_measurement_meter_reason, wam_measurement_gauge_reason) are populated based on the measurement type selected.

Resource Usage

- resourceUsage-to-form.xsl provides the summary of **Resource Usage Details** page from where crew can add timesheets, equipment, and other resource usage. It also displays the resource usage details entered.
- individualTimeUsage-to-form.xsl used to display add/update time sheet screens whereas crewTimeUsage-to-form.xsl is used to enter and update individual and crew timesheets.

- individualEquipmentUsage-to-form.xml and individualOtherUsage-to-form.xml are used to enter equipment and other resource usages.
- Upon completion of resource usage which calls Oracle Integration Cloud (Oracle Utilities OFSC WACS Resource Usage Details integration flow) and update the details in Oracle Utilities Work and Asset Cloud Service.

Service History

- The below XSL are applied to render the UI:
 - serviceHistoryTypes-to-form.xml to show Service History List and the Entered Service histories
 - downtime-to-form.xml for Downtime Service History form
 - failure-to-form.xml for Failure Service History form
 - questionnaire-to-form.xml for Questionnaire and Inspection Service History form
 - sh-to-form.xml for General Service History form
 - entered-sht-count.xml is used to count the entered service histories per each service history type
 - shAttachment-to-form.xml to enter attachments
- The valid service histories are displayed based on the service histories hold by “wam_asset_valid_service_history_types” property.
- The asset failure information is displayed based on the values holds in “wam_failure_info” property.
- The asset downtime reason is displayed based on the values holds in “wam_downtime_reason” property.
- The following BO categories are supported. (Questionnaire and Inspection are handled similarly)
 - Questionnaire
 - Inspection
 - Failure
 - Downtime
 - General
- Refer to [Chapter 5: Customizations](#) for information about adding a custom business object.
 - If the completion message for service histories is greater than 655360, the message is split into multiple wam_service_history_output(i) where i values ranges from 1 to 20 (ie size upto 640KB) properties and and made available for validateCompletion plugin.

Asset Component Install Exchange Undo

- The below XSL are applied to render the UI:
 - assetQuery-to-form.xml to show Install, Attach, Replace, and Undo operation screens.
- Every operation will have have “wam_asset_effective_date_time” property on the screen defaulted to Current Date/Time which can be modified by the user.
- Upon clicking “Search and Add” or “Search and Replace” for Install, Attach, and Replace operations, it calls Oracle Integration Cloud (Oracle Utilities OFSC WACS Asset Query integration flow). If the response succeeds, the assets details are received and the operation is performed successfully. If the response fails, a valid error message is displayed on the screen.

Validate Completion

- This plugin is used to validate and construct the final completion message obtained from individual plugins that is sent out by Oracle Field Service Cloud to Oracle Utilities Work and Asset Management. Click **Complete**.
- The plugin validates to check if there are any pending service histories and all the required service histories are completed.

If the validations are not successful, click **OK** and fix the issue. If the validations are successful, the completion message is written to a temporary file and navigated to the **End Activity** screen. Click **Submit** to send the completion message to Oracle Utilities Work and Asset Management.

- The plugin populates the “participation” node in the completion message with either "W1AW" or "W1AS" based on if the “Asset worked” was selected (checkbox selected) or not.

Lock Unlock

- index.html page provides the summary of **Lock/Unlock status** from where user can Lock or Unlock Activity.

Only on Locking an activity crew can start the operations such as Asset Install, replace, remove, adding timesheet, Equipment and other details. A crew member can lock the activity without starting it. Once activity is locked by any crew it can be unlocked by himself or from dispatch console.

Pick Up

- assetQuery-to-form.xsl displays the asset query screen to query assets from WAM using asset badge number or Location.
- pickupWork-to-form.xsl provides crew member with a dropdown option to choose the level from Work order, Work Request-Asset Related or Work Request- Non Asset Related.
- workOrderRequest-to-form.xsl displays a form where crew member can add details for Work order or Work Request created.
- Upon clicking “Query New Asset” crew gets navigated to Asset Query page which calls the OIC flow((Oracle Utilities OFSC WACS Asset Query). Crew member can clear the selected asset using “Clear Selection” button.

Materials

- materials-to-form.xsl display a dropdown containing list of trucks assisting the crew to Update the truck inventories of selected truck.
- moveMaterials-to-activity-form.xsl to display Use/Undo Use Item, Install/Undo Install Asset and Attach/Undo Attach component screens from truck inventories.
- Initial sync of truck inventories can be performed from dispatch console clicking “Sync Truck Inventories”.

Validation for Completion

Validation Rules

- Basic validation is to ensure that the activity has all the necessary information to be completed.
- All pending service histories must be completed when completing the activity (mandatory).
- Required service histories must be entered for worked assets.
- For each asset that worked, loop through the list of required service history types defined on the activity.
- Find all service histories in the list of activity service histories that its service history type = current service history type being processed and either asset ID = empty or equal current asset being processed.
- If not found, issue an error that "A service history of type %1 is missing for asset %2".

Chapter 6: Hosting Plug-Ins in OFSC

Plug-ins can be hosted within Oracle Field Service or externally.

Oracle Field Service cloud has plugins that can be hosted within Oracle Field Service cloud.

The steps to host a Plug-In within Oracle Field Service cloud is documented in

https://docs.oracle.com/en/cloud/saas/field-service/21a/fapcf/configure-and-use-plugins.html#c_hostingPlugins

The plugins can be hosted externally on

1. Any webserver (Eg: Tomcat) running on a virtual machine either on premise or on cloud
2. It can be stored In Object Storage on a cloud instance by uploading the files either in a public bucket

Additionally if the plugins are hosted externally, then

1. Navigate to **Configuration > Application > Additional Resources**.
2. Select **Allow Cross-origin resource sharing (CORS) from the following web domains** and provide the domain of the server on which the plugins are hosted.

Hosting files on a webserver

Plugins can be hosted on a webserver running on a virtual machine either on premise or on cloud.

The mobile device or browser needs to be able to reach and communicate with the server hosting the plugin files.

Please refer to the documentation of the webserver of choice on how setup and host the static content. The unzipped files of the plugin is then hosted on the webserver. The path to the index.html or the directory containing the index.html is configured in the URL field of the plugin screen as defined in


<https://docs.oracle.com/en/cloud/saas/field-service/21a/fapcf/configure-and-use-plugins.html#configure-and-use-plugins>

The externally hosted plugin can be secured and Oracle Field Service Cloud supports authentication mechanism as defined in

https://docs.oracle.com/en/cloud/saas/field-service/21a/fapcf/configure-and-use-plugins.html#c_authentication

Storing files on Object Storage

Before storing files in Object Storage make sure that the basic administration tasks in Oracle Cloud Infrastructure related to Object Storage are completed properly, and that the compartments and buckets where the plugin files are stored are set up.



For more information on Oracle Cloud Object Storage setup for Oracle Utilities Cloud Services, refer to the latest Oracle Utilities Cloud Services Object Storage Setup Guide at:

https://docs.oracle.com/cd/F35460_01/PDF/UGBU_Cloud_Services_Object_Storage_Setup_21A.pdf

Using public bucket

The unzipped plugin files can be uploaded into a public bucket in which case the files are not protected and is open to public. The URL to index.html in the public bucket is configured in URL field in Oracle Field Service Cloud.