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TECHNOLOGIES

Multi-Day View

for

ORACLE®

FIELD SERVICE CLOUD

Version 15.2
Part Number E62382-01

TOA Technologies-Oracle, 2015

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1 Document Purpose and Scope

This document is intended as a description of the Multi-Day View – a new feature of Oracle Field Service Cloud introduced to be used by the dispatchers and managers engaged in activities assignment. It is assumed that the reader is familiar with the basics of Oracle Field Service Cloud (former ETAdirect) functionality and operating principles.

2 Glossary

The glossary below contains the basic Oracle Field Service Cloud terms used in this document.

Term	Explanation
Activity	Entity of the Oracle Field Service Cloud system that represents any time-consuming activity of the resource
Company	1) Legal entity, using Oracle Field Service Cloud 2) Entity that represents a Client in Oracle Field Service Cloud; company is created by TOA Technologies during the process of implementation
Manage Application	Product that allows to manage workforce and activities in realtime. Usually serves as an interface for dispatcher
Mobility Application	Product that allows field personnel to interact with the system
Not scheduled	Activity not assigned to a specific date
Not ordered	Activity with an unspecified order of execution in a queue, so that it can be executed at any time during the working day. Not-ordered activities do not have defined ETAs or delivery windows
Resource	Element in the resource tree representing a defined company asset
Resource Tree	Hierarchy of company resources, showing "parent-child" relationships
Route	List of activities assigned to a resource for a specific date, or a list of non-scheduled activities assigned to a resource
User	1) Person using Oracle Field Service Cloud 2) Entity used for authentication and authorization, allowing people or external software to access Oracle Field Service Cloud

3 Introduction

ETAdirect functionality has been constantly developing to increase its usability and convenience. For years it has been providing a flexible system of activities and field personnel management where the workload of each technician or team could be planned in the most efficient way.

As of version 15.2 Oracle Field Service Cloud has taken one step further by offering the possibility of viewing the activities over several days on the same screen. This new feature allows getting a broader picture of the resources' workload and managing activities and resources on multiple days.

4 Overview of Multi-Day Activities View Functionality

The Activities Time View displaying the activities assigned to resources in the Resource Tree on each day now has an option allowing to view the activities on several days. When this option is selected, the Time View splits into several columns each representing one day.

4.1   Activities View Calendar

The calendar used to select the date for which activities are to be displayed has been enhanced with the addition of the Advanced Calendar where the period in which activities are to be displayed can be selected.

Clicking the date at the top of the Activities View screen opens the calendar which now has an additional bar where one of the following options can be selected:

- – **Day** – the Activities View will show activities for a single day as in the previous versions of ETAdirect

- – **2 days** – the Activities View will show activities for two days starting from the selected date

- – **3 days** – the Activities View will show activities for three days starting from the selected date

- – **Week** – the Activities View will show activities for seven days starting from the selected date
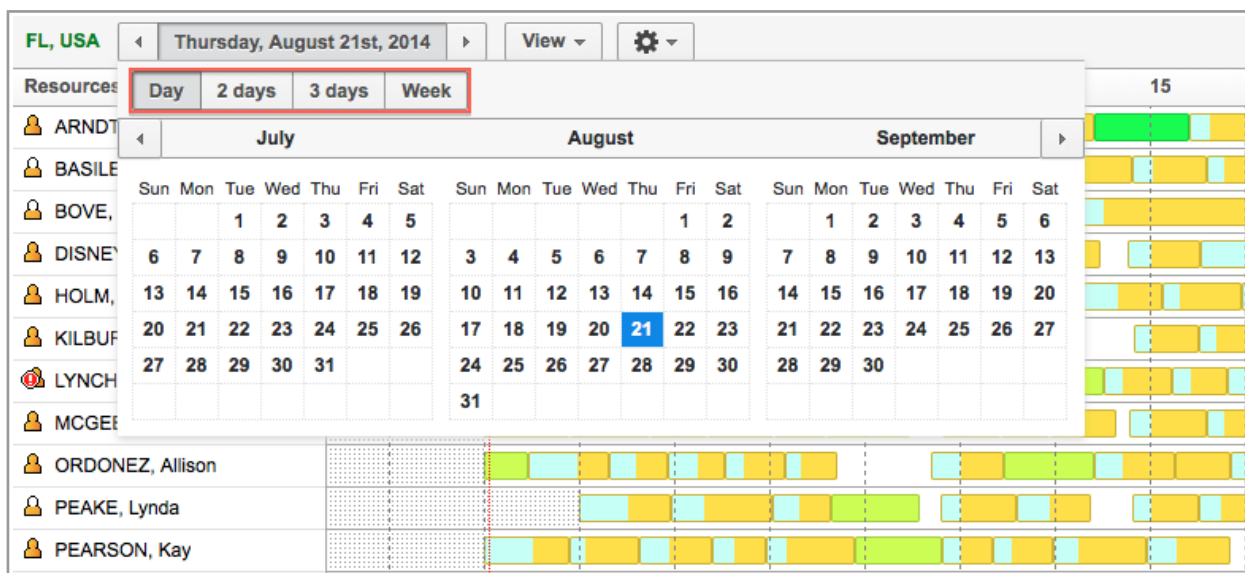

Figure 1: Advanced calendar

To change to the Multi-Day View, the user has to select the Advanced Calendar option and then choose the starting date in the calendar by clicking it. The screen will change to show 1 day, 2 days, 3 days or 7 days, respectively.

4.2   Multi-Day Time View

When the Multi-Day mode is selected in the Time View, each day is represented as a column containing resources' routes for such day.
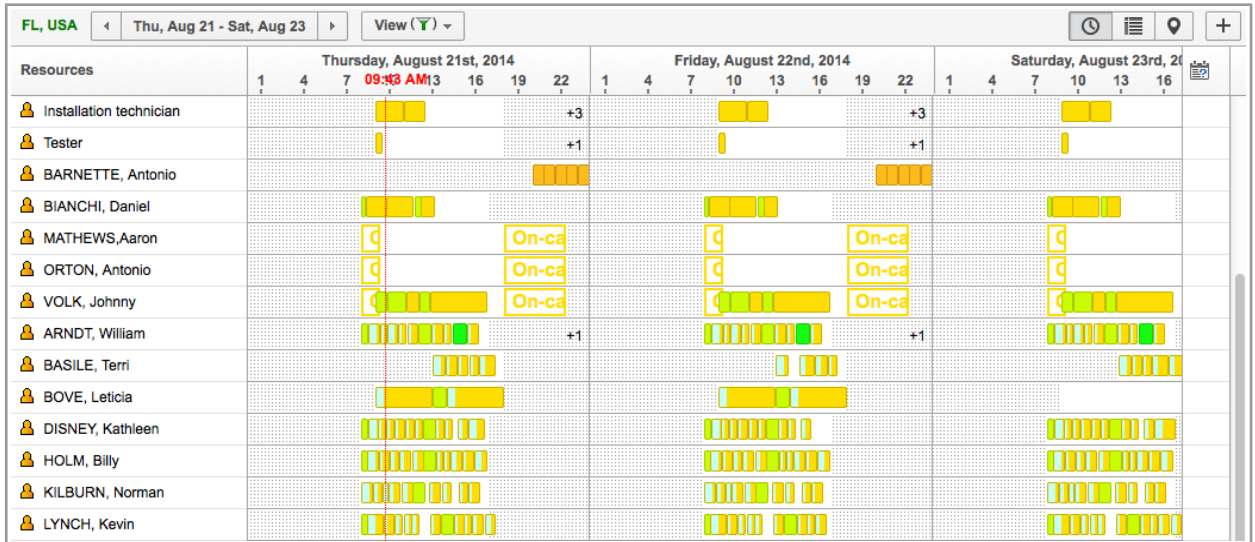
Figure 2: Multi-Day Time View

The columns are distributed evenly by width and are automatically resized according to the resources' calendars. If the calendar has more hours, the columns will be wider than for calendars with less hours. The screen has a horizontal and a vertical scroll-bar to scroll the view when it is too large to fit the screen.

When Overtime is enabled for the company, the scale for each day is longer than 24 hours, as it also includes the overtime period after midnight.

The Multi-Day mode shows activities with ETA no earlier than 2 hours before the resource's calendar start time and/or Activity End Time no later than 2 hours after the resource's calendar end time. Any activities outside this range are hidden from view with the Multi-Day mode enabled.
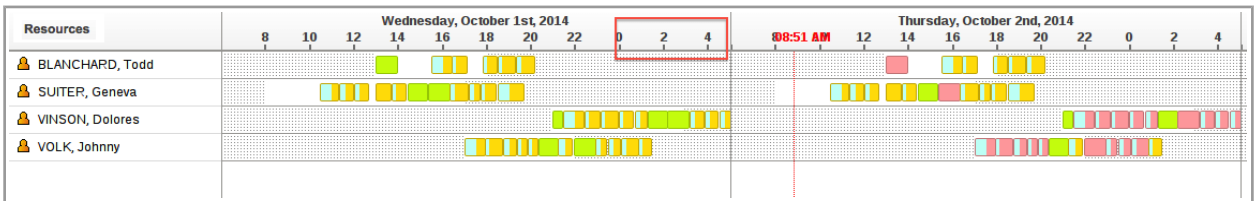

Figure 3: Overtime shown on Time View

Similarly to the Single-Day View, the Multi-Day View offers the possibility of opening the bottom panel by clicking the 'plus' button in the top right of the screen. Initially, the bottom panel is cloned from the main panel and is, therefore, its identical copy. If necessary, the Activities View in either panel can be changed to Single-Day or set to display a different calendar option.
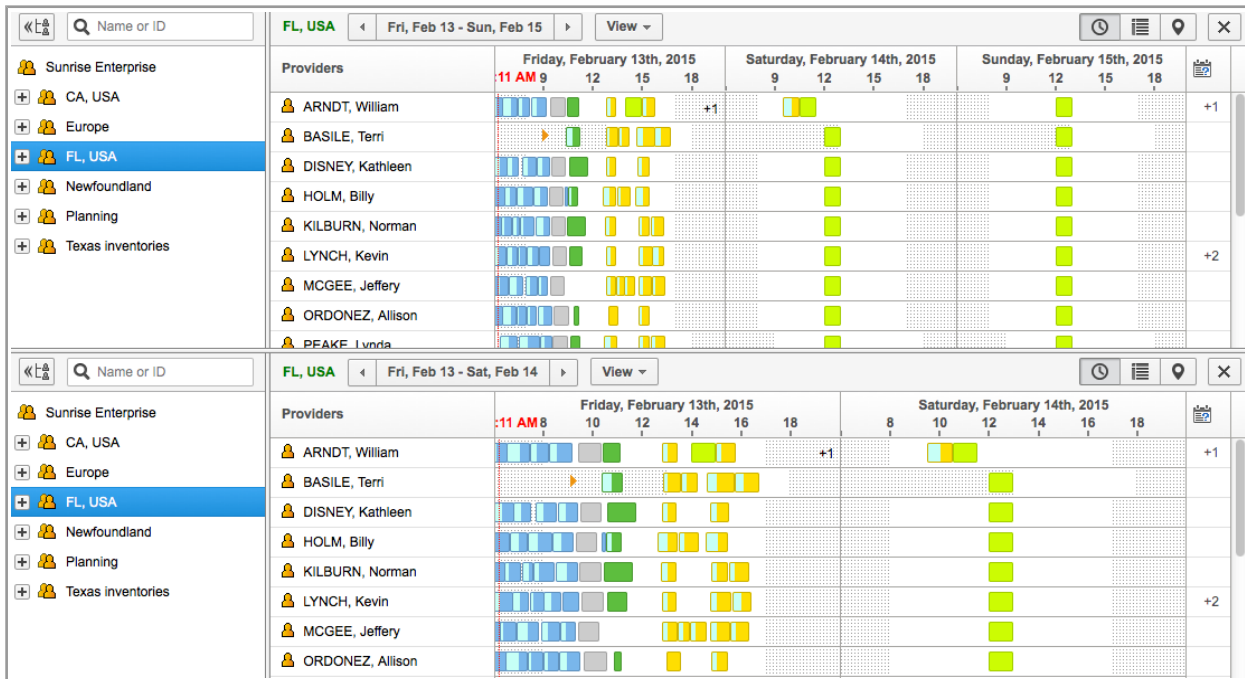
Figure 4: 3-days view in the top panel and 2-days view in the bottom panel

4.3   Resource Tree in Multi-Day View

With the Multi-Day mode selected, the Resource Tree behavior is different from that in the Single-Day View:

- – all resources are represented with full route icons

- – no resource statuses are shown

- – the Resource Tree cannot be filtered

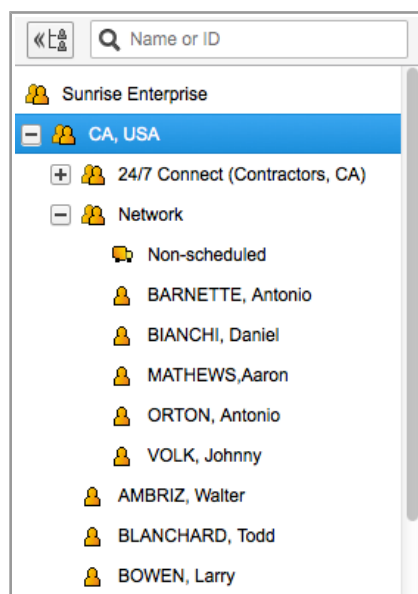- – resources have no activity counters

Figure 5: Resource Tree in Multi-Day mode

4.4   Non-Scheduled and Not-Ordered Activities in Multi-Day View

Not-ordered activities are shown in the resource's route in the end of each day. They appear as '+N' meaning the number of not-ordered activities assigned to the resource. Non-scheduled activities are shown in the separate column along the right side of the screen. This column is always visible, and the number of non-scheduled activities is shown as '+N'.
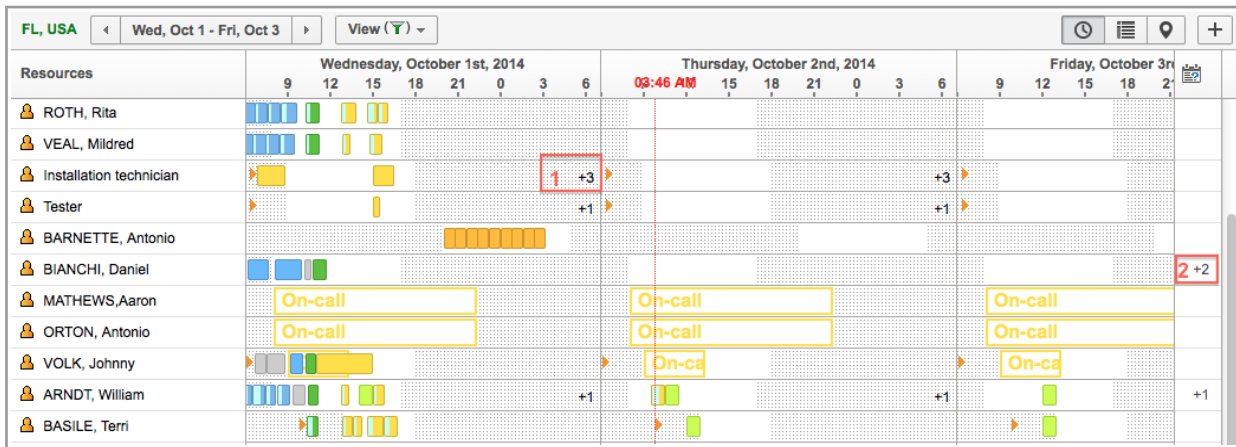

Figure 6: Not-ordered (1) and non-scheduled activities (2) on Multi-Day View

4.5   Activity Move in Multi-Day Mode

The new Multi-Day View offers a very easy and clear means of activity move between resources and activity reschedule to a different day. When the resources' routes for several days are visible on the screen at the same time, activities are moved by simple dragging and dropping.
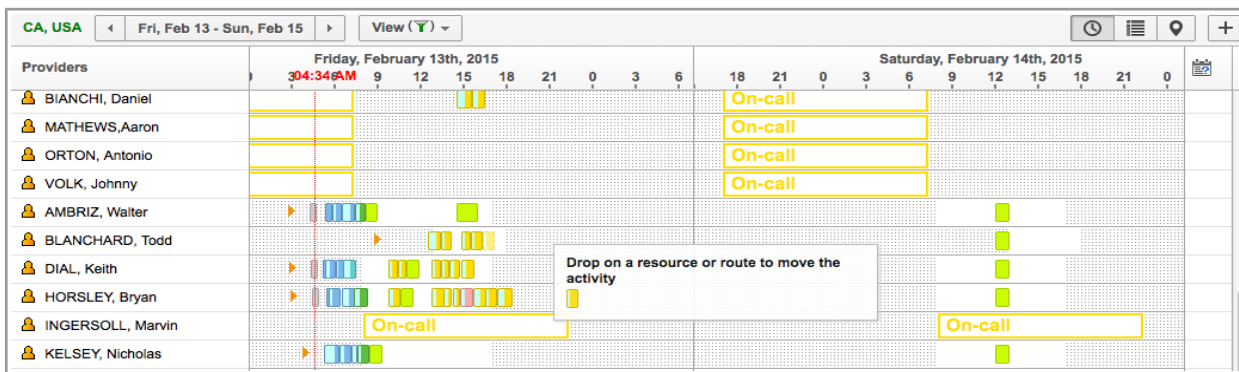

Figure 7: Activity move in Multi-Day mode

However, to move a pending activity to the non-scheduled pool, the screen has to be switched to the Single-Day View.

The usual checks are performed and warnings and alerts are displayed when any constraints have been violated by the activity move.