Oracle Field Service Cloud
Using Core Application

19A
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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center.

Documentation Accessibility

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- For web-based user guide, Web-based User Guide Survey
- For tutorial feedback, Tutorial Survey
1 Overview of Oracle Field Service Cloud Core Application

About the Core Application

The new Oracle Field Service Cloud Core Application combines the features of Oracle Field Service Core Manage Cloud Service and Oracle Field Service Mobility Cloud Service.

Oracle Field Service Core Manage Cloud Service includes the functionality for Dispatchers, Managers, and Administrators and Oracle Field Service Mobility Cloud Service includes the functionality for Field Resources and both the applications are accessed using different URLs. Now, you use a single URL to access the functionality for all these roles. The services available in Oracle Field Service Cloud Core Application include Dispatch Console, Routing, Smart Collaboration, Smart Forecasting, Capacity, and Configuration.

Supported Browsers

Oracle Field Service Cloud customers are required to remain on supported web browser platforms to ensure expected functionality and technical support.

The Oracle Software Web Browser Support Policy defines Oracle Global policy. The specific details for Oracle Field Service Cloud supported browsers apply to customers on the latest generally available (GA) release and are available at Oracle Field Service Cloud Browser Support Policy.

Log In

Use https://login.etadirect.com to access Oracle Field Service Cloud Core Application. Contact your Administrator for your user name and password for the application.

All users, including Dispatchers, Administrators, and Field Resources use the same URL to log in to the application. Each type of user has access to different screens, which is controlled by user permissions.

Reset Your Password

You can reset your password without any assistance from the administrator or someone in the back-office.

1. Click Can't sign in on the Login screen.
   The Let's find your account screen is displayed.
2. Enter your user name.
   If your user name is valid, the following password recovery email is sent to your email address:
"Password request for Oracle Field Service Cloud "
Your password reset request has been received. Please reset your password by clicking this secure link: <link>

If you did not request a password reset, you can ignore this email and continue logging in with your current password.

Thanks,
The Oracle Field Service Cloud team

3. If you do not get the email, click Resend email.
4. Open the email and click the link to recover the password.
   The Reset your password screen appears.
5. Type the new password twice and click Submit.
   A confirmation that your password is reset appears.
6. Click Back to sign in.
   The Login screen appears, where you can log in using the new password.

Offline Mode Tasks

You can access the application features offline, only if you have purchased it separately. If you have not purchased it, access to offline functions is restricted, and the data collected offline is not stored or processed.

The following table lists the tasks that you can and cannot perform offline:

<table>
<thead>
<tr>
<th>You can:</th>
<th>You cannot:</th>
</tr>
</thead>
<tbody>
<tr>
<td>For the route</td>
<td>For resources</td>
</tr>
<tr>
<td>• Activate/deactivate/reactivate route</td>
<td>• Log in/log out</td>
</tr>
<tr>
<td>• Browse the activities list</td>
<td></td>
</tr>
<tr>
<td>• Print the route</td>
<td></td>
</tr>
<tr>
<td>• Add activities</td>
<td></td>
</tr>
<tr>
<td>• Send resource requests</td>
<td></td>
</tr>
<tr>
<td>• Browse the resource-request list</td>
<td></td>
</tr>
<tr>
<td>• Browse resource-request details</td>
<td></td>
</tr>
<tr>
<td>For scheduled activities</td>
<td></td>
</tr>
<tr>
<td>• Change activity order/position in the route</td>
<td></td>
</tr>
<tr>
<td>• Browse activity details</td>
<td></td>
</tr>
<tr>
<td>• Edit activity details</td>
<td></td>
</tr>
<tr>
<td>• Set an activity to started/completed/canceled/delayed/suspended/not done</td>
<td></td>
</tr>
<tr>
<td>• Delay/adjust time</td>
<td></td>
</tr>
<tr>
<td>• Create/complete/delay pre-work</td>
<td></td>
</tr>
<tr>
<td>Note: If you close and then reopen your browser during the time you are offline but are within the session expiration time, the browser will restart and the offline session will resume. Enter the URL of any screen to access the Restore screen.</td>
<td></td>
</tr>
<tr>
<td>• Change your password</td>
<td></td>
</tr>
<tr>
<td>• View maps, directions, or map layers</td>
<td></td>
</tr>
<tr>
<td>• View calendars</td>
<td></td>
</tr>
<tr>
<td>• Select a resource or change users</td>
<td></td>
</tr>
<tr>
<td>• Change options</td>
<td></td>
</tr>
<tr>
<td>• Manage activities not on today’s route</td>
<td></td>
</tr>
<tr>
<td>• Add a teamwork activity</td>
<td></td>
</tr>
<tr>
<td>• Reschedule an activity</td>
<td></td>
</tr>
<tr>
<td>• View nearby activities</td>
<td></td>
</tr>
<tr>
<td>• View activity history</td>
<td></td>
</tr>
<tr>
<td>• Download and view thumbnails of files, images, and signatures</td>
<td></td>
</tr>
</tbody>
</table>
### You can:

- Send activity requests
- Browse activity-request details

For non-scheduled activities:
- Send activity requests
- Cancel activities
- Browse activity details
- Edit activity details

For inventory:
- Browse the inventory list
- Browse/edit inventory details
- Add/edit/install/deinstall/exchange inventory
- Send inventory requests
- Browse the inventory-request list
- Browse inventory-request details

Other:
- Manage activity links (with some constraints)
- Search the Parts Catalog (if provisioned and cached)
- Work with multi-day activities (however, the number of segments cannot be calculated correctly)

### You cannot:

- Preview files that are already on the server
- Use action links that are only available for online use
- Use Oracle Field Service Collaboration Cloud Service
- Use Oracle Field Service Smart Location Cloud Service

#### Notes:

- You can add new files to the activity when you are offline, but they are synchronized only when you are back online.

- Note: These tasks are in addition to the ones listed above.

- Move an activity to another resource (when move within a user’s route is enabled)
- View all resources on the resource selection screen if all resources do not fit on a single screen
- View the Manage screen
- Perform resource-management functions including, but not limited to:
  - Create/edit groups
  - Make calendar changes
  - Use the team map
  - Use the Gantt view

Access Routing, Capacity, and Forecasting screens

### Services Available

This topic gives the list of services available in Oracle Field Service Cloud Core Application.

The following table gives the list of services available and the documents you can access to get more information:

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
<th>Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration</td>
<td>Lets you configure the application to suit your business requirements</td>
<td>Administering Oracle Field Service Cloud</td>
</tr>
<tr>
<td>Forecasting</td>
<td>Lets you forecast the workload and plan the capacity</td>
<td>Using Forecasting Cloud Service</td>
</tr>
<tr>
<td>Capacity</td>
<td>Lets you plan and manage capacity and quota availability for booking</td>
<td>Using Capacity Cloud Service</td>
</tr>
<tr>
<td>Routing</td>
<td>Lets you assign activities to resources based on activity location, skill set, and resource work history</td>
<td>Using Routing Cloud Service</td>
</tr>
<tr>
<td>Smart Location</td>
<td>Lets you find the location and track the travel patterns of a resource</td>
<td>Using Smart Location Cloud Service</td>
</tr>
</tbody>
</table>
Accessibility

We recommend that you use the accessibility features provided by your operating system, browser, or your mobile device. People who are visually impaired can use a screen reader to interpret the user interface components. Further, you can use your device settings to change the color contrast and font size. The following table lists the applications that are rich in graphics and/or text, so you can adjust the color contrast (in your operating system or browser) or font size to view these screens:

<table>
<thead>
<tr>
<th>Module</th>
<th>Text rich</th>
<th>Graphic rich</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Field Service Capacity Cloud Service</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Oracle Field Service Cloud Core Application</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Oracle Field Service Collaboration Cloud Service</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Oracle Field Service Forecasting Cloud Service</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Oracle Field Service Routing Cloud Service</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Oracle Field Service Reporting Cloud Service</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Oracle Field Service Smart Location Cloud Service</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Oracle Field Service Cloud ETA Workforce</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Oracle Field Service Administration Cloud Service</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
Chapter 2

Dispatcher Activities

How the User Interface is Organized

This section provides an overview of the screens, sections, and features that you can use to accomplish daily activities.

- The resource tree organizes all the elements of your configuration — both personnel and equipment — into hierarchical groupings usually based on geographic location.
- Expand those groups and select a resource from the tree and the application will display that resource’s schedule in the work area.
- Take that display down another level in the Lower Work Area where workloads can be reviewed and tasks dragged and dropped from one resource to another.
- Menu Tabs run across the top of the grid giving you access to other parts of the application, such as Reports and Configuration.

Vanilla Theme

The Vanilla theme displays header icons to access the most frequently used screens in Manage and Mobility. All other themes use the classic look, which is, using tabs with words instead of icons and no navigation (hamburger) menu.

You can configure the header icons for your choice of the most frequently used screens. However, remember that only four icons will be shown regardless of the number of icons you choose. You can access the remaining screens by clicking the hamburger icon in the top-left corner, next to Oracle logo. The four header icons are separated from the icons for search, collaboration, and user by a marker ‘|’. The search, collaboration, and user icons appear on the right of the | marker. You can configure the menu in the Configuration > User Types > Main menu items screen. The following figure shows the Vanilla theme header:

The legends are:

1. Menu items, which can be hidden or opened
2. Hamburger icon (next to Oracle logo) to open the menu items
3. Header with icons for most frequently used screens or actions

You can configure the header icons on the Main Menu Items context layout screen. The item that is placed first in the list becomes the Home icon. The following figure shows the Main Menu Item context layout screen:
In the previous figure, if Daily is moved to the top of the list, it becomes the home page and is shown with the Home icon. Oracle logo and the header icons adapt to the screen size. For wide screens all the header icons are present, for smaller screens the application name disappears, and for the smallest the application name and header icons disappear. In such cases the menu is accessible using the left pane. The following figure shows the icons that you can use in the header:
Resource Tree

The resource tree provides a hierarchical view of your organization’s resources, typically sorted by geographical region. It displays on the left side of the screen.

You can click the toggle button to show or hide the resource tree. When you select a resource from the resource tree, the resource’s activities display in the work area on the right. Click the plus sign (+) next to an entity in the resource tree to expand and view the entities under that group or bucket. Click the minus (-) sign to collapse that view.

The resource types and the overview of the roles performed by each item in the resource tree are:

- Field resource: This resource can perform work, has work skills, work zones associated, and has a related user that is an actual person performing work or a crew or people.
- Vehicle: This resource can have work skills, inventory, and geolocation tracking enabled. When assigned to a team it may add the required work skills and inventory to be used by the team.
- Tool: This resource represents specific tools such as 30-feet ladder and excavator. This resource can have work skills, inventory, and geolocation tracking enabled. When assigned to a team it may add the required work skills and inventory to be used by the team.
- Bucket: This resource is used to accumulate work that is not yet distributed to field resources. Only the application can assign activities to this resource. This resource is used for Quota Management.
- Organization unit: This resource aggregates field resources, vehicles, and tools in the tree-like hierarchy to simplify management and reporting. This resource is used for Quota Management.

Resource Tree Icons

The shape of the icons in the resource tree indicate whether the entity is a bucket, group, or resource as shown in the below:

- double silhouette: This designates a bucket or an organization unit. Buckets generally have numbers to the right of them, while groups do not.
- single silhouette: This designates a mobile employee, a resource, a truck or equipment. Technician resources also have numbers to the right of them indicating the pending activities remaining, and the total activities assigned.

The color of the icons indicates the status of the resource’s queue:

<table>
<thead>
<tr>
<th>Icon colors</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Yellow – Resource does not have a route or the route is inactive.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Blue – The route is activated. (The resource is working.)</td>
</tr>
</tbody>
</table>
Icon colors

Grey – Route is deactivated or completed. (Resource has finished working for the day).

You can display the type of icon and the queue status in the resource hint box, which can be configured in the Screen Configuration screen. Additional symbols appear for certain exception situations. For example, a grey box indicates a non-working resource.

Related Topics
- Resource Tree Alerts

Work Area

The work area displays the details about the resource selected in the resource tree. The information changes, depending on the tab selected in the menu. Across the top of the work area are several buttons. These buttons let you access various features and are described in detail below.

The work area is shown in the following figure:

Date Field

The date displays next to the resource name:

Arndt, William  Friday, September 7th, 2018

Select the time interval to view. Then select the start date on the calendar. Use the arrows to move forward or back in time on the calendar, as shown in the following figure:
View Button

The **View** button allows you to fine-tune the information you see in the work area. It contains a list of configured filters as shown in the following figure:

Choose a configured filter from the drop-down list or sort the data using the check boxes. You can create custom filters. To view all activities and resources below the selected Resource Type in the resource tree, select the **Apply Hierarchically** check box. The Show on-call, Show non-working, Show resource trace check boxes are displayed only if you have purchased Oracle Field Service Cloud Smart Location.

Action Links

The **Action** button (gear icon) gives you access to a list of actions that affect the contents of the work area, as shown in the following figure:
Your User Type determines the actions that you can see in the drop-down menu. The Actions you see depend on the screen you are viewing and your settings. Depending on your configuration, these same links can be visible in the Hints boxes.

View the Lower Work Area Panel

The lower work area panel displays drill-down details for entities selected from either the upper panel or directly from the Resource Tree.

When used as a drill-down, the lower panel can display route information for any resource, bucket or group selected in the upper panel. For example, if a resource is selected in the upper panel, the lower work area panel can display the scheduled or non-scheduled activities for that resource.

Since the Resource Tree can be accessed directly from the lower work area, that panel can also be used to search and display information independent of the display in the upper panel. This facilitates detailed comparison of resource availability in two panels.

Follow these steps to view the lower panel:

1. Navigate to Time view.
2. Select an entity from the Resource Tree.
3. View the resources displayed in the upper panel.
4. Select a resource from the upper panel.
5. Click the [+] to view that resource’s schedule in the bottom panel.
6. Optional: Drag and drop the display in the lower panel to the upper panel.
7. Optional: Repeat steps 2-4 in the lower work area to select and view the schedule of a second resource in the bottom panel.
8. Optional: Compare the two panels to identify the resource that meets your requirements.
Resource and Activity Views

You can use Oracle Field Service Cloud to identify, at a glance, the location of your resources and the status of their routes. You can view this information in three ways.

- **Time view** - A Gantt table that displays the activities for the selected resource, group, or bucket in timelines, with activities shown as blocks of time.
- **List view** - A chronological list of the day’s activities for the selected resource, group, or bucket. Activities are ordered by estimated start time.
- **Map view** - A map that shows the day’s activities.

Menu Tabs

The menu tabs that run across the top of your screen contain a number of functions that can be used to manage your workforce.

Dispatchers typically perform most of their work in the Activities tab. The items you see listed for your company’s configuration may be different based on your user type. You can configure the items that appear in the menu tab on the Main Menu Items context layout structure screen.

The following figure shows the menu tabs, which include Activities, Dashboard, Daily, and Configuration:

![Menu Tabs](image)

Note that the menu tabs at the top are in the same order as the menu on the left. The first four items in the menu on the left are displayed as the menu tabs on top, so you can decide which items you want to display.

<table>
<thead>
<tr>
<th>Menu</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities</td>
<td>Access the Core Manage screen to perform most of the dispatch work.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Access the reports Dashboard to generate reports.</td>
</tr>
<tr>
<td>Daily</td>
<td>Access the Daily view of a resource, bucket, or organization unit.</td>
</tr>
<tr>
<td>Configuration</td>
<td>Access the configuration menus for Oracle Field Service Cloud</td>
</tr>
</tbody>
</table>

Color Codes

The activities displayed in the work area are classified by color, which provides you with a quick view of the status of the day’s schedule.

The table below explains the default colors and their corresponding statuses:
**Note:** Color codes can be changed during implementation to reflect the colors your company prefers for representation of the various activities.

<table>
<thead>
<tr>
<th>Color code</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Color: Yellow; Hex: FFDE00</td>
<td>Pending activity (on time)</td>
</tr>
<tr>
<td>Color: Blue; Hex: 79B6EB</td>
<td>Completed activity</td>
</tr>
<tr>
<td>Color: Pink; Hex: FFAAAA</td>
<td>Pending activity (in jeopardy of being late)</td>
</tr>
<tr>
<td>Color: Electric blue; Hex: 99FFFF</td>
<td>Suspended activity or teamwork</td>
</tr>
<tr>
<td>Color: Turquoise; Hex: 60CECE</td>
<td>Not done activity</td>
</tr>
<tr>
<td>Color: Light Orange; Hex: FFCC99</td>
<td>Not ordered activity</td>
</tr>
<tr>
<td>Color: Green; Hex: 5DBE3F</td>
<td>Started activity or teamwork</td>
</tr>
<tr>
<td>Color: Light green; Hex: 80FF80</td>
<td>Canceled activity or teamwork</td>
</tr>
</tbody>
</table>
## Color code

<table>
<thead>
<tr>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel time</td>
</tr>
</tbody>
</table>

- Color: Humming Bird; Hex: COFFEE

<table>
<thead>
<tr>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending internal activity or teamwork</td>
</tr>
</tbody>
</table>

- Color: ; Hex: 

<table>
<thead>
<tr>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ended activity</td>
</tr>
</tbody>
</table>

- Color: ; Hex: 

<table>
<thead>
<tr>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-work, or re-opened activity</td>
</tr>
</tbody>
</table>

The colors are consistent throughout all the views. For example, started activities are always green whether you are in **List** view, **Time** view or **Map** view.

### Time View

The Time view is a Gantt table that displays the activities for the selected resource, group or bucket in time lines with activities shown as blocks of time. Dispatchers and managers often use this view because it displays multiple routes in one view. The length of a travel bar on the Time view is based on the travel time between two consecutive activities in a route ("travel" field).

You can access the Time view by clicking the **Time View button**. It provides an instant picture of the day in real time, as shown in the following figure:

![Time View](image)

In the example mentioned earlier:

- **Zoom In/Out**: Under **View**, slide the slider to the right to zoom in and to the left to zoom out. Then click Fit.
- **Time Scale**: Shows the distribution of time and activities over the hours of the workday.
• **Current Time:** The current time is represented by a dotted red line and the time is displayed at the top end of the line. You can move your mouse along the time scale to identify specific times that an activity started or ended. A blue line appears at the mouse pointer, called the inspect line. The current time reference line is displayed based on the following guidelines:
  - Time View does not scroll, if the current time reference line is available when a screen opens. The visible part of Time View starts at the start of the day.
  - Time View scrolls to the right, if the current time reference line is not available when a screen opens and the current time falls within a range of ‘start’ and ‘end’ parameters. The visible part of Time View is scrolled to a position in which the current time reference line is shown at the right side of screen.
  - Time View does not scroll, if the current time reference line is not available when a screen opens and the current time is later then ‘end’ parameter.

• **Activation Time:** The orange triangles at the beginning of each shift represent the actual times that resources activated their routes.

• **Deactivation Time:** The orange triangles at the end of each shift represent the actual times that resources deactivated their routes.

• **Non-working Time:** The grey blocks of time at the beginning and end of each route represent the non-working time based on the hours set in the resource’s calendar.

The colors indicate the status of each activity. Pending (and on time) activities are yellow, while green means the activity has started. Pink indicates a risk that the resource will now be late. These colors are consistent from one view to another as well as on the resource’s mobile device. The colors in the screen shots given here are default colors, you can change them per your organization’s requirements. Further, you can display the activity status in the activity hint. You configure the activity hint in the Screen configuration screen.

An exclamation point on a resource silhouette indicates an alert, and the activities in pink are the activities that are in jeopardy as shown in the following figure:

The colors indicate the status of each activity. Pending (and on time) activities are yellow, while green means the activity has started. Pink indicates a risk that the resource will now be late. These colors are consistent from one view to another as well as on the resource’s mobile device. The colors in the screen shots given here are default colors, you can change them per your organization’s requirements. Further, you can display the activity status in the activity hint. You configure the activity hint in the Screen configuration screen.

Five of the routes shown above include activities that are currently in jeopardy.

**Related Topics**
- Activity Alerts
- Resource Tree Alerts

**Month View**

The Calendar in the Time View includes the Day, 2 Days, 3 Days, Week, and Month options, to view activities for a day, two days, three days, a week, and a month respectively. By default, the Day view is displayed.

The Month view displays the activities scheduled for 30 or 31 days, depending on the month, starting from the selected day. The shape and colors of activities are same in the Week and Month views. In the Month view, the daily activities are shown at the work day/work schedule level, instead of the time level. So, if two resources have different start times, their starting activities are shown at the same level.
Note: Accessing all 30 days in a single view requires a 4K display or a multi-monitor configuration. When smaller screens are used, it is expected behavior that the user will have to scroll for the Week or Month views.

Activities that are shorter than 1/4th of the resource schedule length, or don’t fit to either 1/4th, ½, or 3/4th of the resource schedule length are shown in the condensed activity view as striped bars. Click the condensed activity view to see the activity details and the activity hint. A multi-day activity that ends at the end of the previous day and starts at the beginning of the next day is shown as a single activity over multiple days. You can move activities in the Month view by dragging and dropping them. If the activity is hidden inside the stripped bar, open the hint and then drag the activity to the required place. Or you could drag-and-drop the whole multi-activity block.

Displaying the Month view for large buckets or where routes have more than 20 activities per resource per day may take additional time to render. It is recommended that you use this view when there are fewer then 20 resources that will be presented. The rules for displaying activities in the Month view are:

- Mass repeating activities (for example, lunches) are not shown.
- Non-ordered activities are not shown.
- Multi-day activities that end at the end of the work day and continue the beginning of the next day are shown as a single activity over multiple days.
- If there are more then 10 activities, "and ‘n’ more" link is displayed.
- When a resource has non-working days, they’re shown as dotted pattern.
- When you split the panels, it is possible to configure each panel with a different start date for the Month view.
- When the period covers different months, the month names are shown at the very top row.
- Activities that do not fit into ¼, ½, or ¾ of the workday length are shown as a multi-activity (striped bar) using the following rules:

  - If there is a single activity that has a duration between 70% and 100% of 1/4th of the day, it is shown as 1/4th of the day activity, as a solid bar.
  - If there is a single activity that has a duration between 70% and 100% of ½ of the day, it is shown as ½ of the day activity, as a solid bar.
  - If there is a single activity that has a duration between 70% and 100% of ¾ of the day, it is shown as 3/4th of the day activity, as a solid bar.
  - If there is a single activity that has a duration between 70% and 100% of the day, it is shown as the whole day activity, as a solid bar.
  - Otherwise the activity is shown as a part of a striped bar.

For example: Suppose that a work day for a technician starts at 8:00 AM and the work day duration is 8 hours. In this case, the activities starting at 8:00 AM and finishing at 10:00 AM (2h = 1/4 of the work day duration), starting at 10:00 AM and finishing at 2:00 PM (4h = 1/2 of the work day duration), or starting at 10:00 AM and finishing at 4:00 PM (6h = 3/4 of the work day duration) are shown as single activities. But the activities starting at 9:00 AM and finishing at 10:00 AM (1h = 50% of 1/4th of 8h work day) and starting at 11:00 AM and finishing at 1:30 PM (2.5h is more than 100% of 1/4th of 8h work day, but less than 70% of 1/2nd of 8h work day) are shown as a multi-activity.

Configure List View

List view is a chronological list of the day’s activities for the selected resource, group or bucket. Activities are ordered by estimated start time. This view provides a detailed view of the resource’s schedule in one screen. The length of a travel bar on the List view is based on the ‘Continuous traveling time’. It is useful when you want to see both the daily schedule and the related details all at once. You can configure the organization of the columns in List view so that it is easier to read and understand. Specifically, you can rearrange as well as show and hide the columns.

1. Open List view and click the wrench icon in the upper right corner.
The **Grid Preferences** dialog displays and shows the options configured for your user type.

2. Check the boxes for the columns you want to see. To hide a column, clear the check box.
3. Use drag and drop to change the order of the columns.
4. Use the blue double-headed arrow to disable word wrapping in a particular column.

**Map View**

The **Map** tab displays the day’s activities on a map. Activities for the selected resource appear on the map in the center of the screen and are also displayed in a chronological list on the right side of the screen.

This figure shows the **Map view** for a resource. This view shows not only the activities the resource needs to perform, it also shows the route the resource can take to reach the activity location.
The map view uses the same color codes as the other views.

The map view displays the activities for addresses that can be found. Resolved addresses are assigned either a letter (as shown above) or a plus (+) sign. If the address cannot be found, the activity appears in the list without a letter, or a plus sign next to it. The GPS travel related complaints and alerts are disabled for activities that have multiple traveling time segments. If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown.

Activities for the selected resource appear on the map in the center of the screen and are also displayed in chronological order on the right side of the screen. This is useful when you want to see the activities in relation to the route. The map view shows you the distribution of activities within a geographical region so that you can picture how the resource will get to each stop on the route.

**Resource Track Highlighting**

There are two ways to analyze a resource track in the Map View—by viewing the route between resources and by highlighting a specific part of a track. Hovering over a breadcrumb on the map highlights the part of the track that contains the selected breadcrumb. When hovered over any activity marker on the map, the track between the previous and selected activities is highlighted and the non-related tracks are muted. This lets you see the track between two locations.

The tracks are highlighted as described below:

- When hovering over any activity marker on the map for at least half-a-second, or clicking the activity icon on the right panel:
  - The part of the track between the previous and selected activities is highlighted.
  - The selected and previous activity markers are highlighted.
  - The remaining activity markers and breadcrumbs are grayed out.

- When hovering over a point from the track for at least half-a-second:
  - The part of the track and the activity markers from the previous activity to the next one are highlighted.
  - The remaining activity markers and breadcrumbs are grayed out.

The following figure shows a track between points B and C highlighted in red:
The following rules are followed while highlighting:

- The highlighting described in the earlier bullet points are applied only for non-clustered points.
- Both resolved and unresolved activities are considered when highlighting the route. If activity B is highlighted and there is an unresolved activity (for example, Lunch) before it, then the track is rendered from Lunch to B.
- Breadcrumbs between the selected part of the route are highlighted gradually, one after another. The order of highlighting is based on the timestamp, starting from the earliest one.

Hint for a clustered point: When you click a clustered breadcrumb (resource track point) the hint ‘Zoom in’ appears near it. It displays the timestamps of the points that the cluster contains. Upon clicking Zoom in, the map is zoomed in to the area with breadcrumbs. The following figure shows a clustered breadcrumb with the hint:
View a Group or Bucket in Map View

You can see the location of all the resources for a particular group or bucket in the map view.

1. Select a group or bucket from the resource tree.
2. Click Map View.
3. Click View.
   The View menu opens.
4. Select the Apply Hierarchically check box.
5. Click Apply.
   The map displays and shows the location of 1000 scheduled and 1000 non-scheduled activities on all of the routes for the resources in the selected group or bucket.
View a Resource in Map View

When viewing an individual resource in Map View, you can see the resource’s location as well as the location of nearby resources. The application plots the suggested route, provides driving directions, and traces the actual route taken by the resource (Resource Trace).

Note: Driving directions for Oracle map and geocoding are only shown in English (default), French, German, Italian, and Spanish.

1. Select the resource from the resource tree.
2. Click Map view.

The screen shows a map and a list. The map shows the resource’s route pertaining to scheduled activities and the list includes scheduled and non-scheduled activities for the day. If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown. The following figure shows the Map view for a resource and the activities assigned to the resource:
3. Click **View**.

   The **View** menu opens:

   ![View Menu](image)

   - **Filters**
     - Show resource location on the map
     - Show nearby resources
     - Show resource trace
   
   Click **Apply**.

4. Click the Show resource trace check box in the **View** menu.

   The screen resets and the route is indicated by dots. See the Oracle Field Service Cloud Smart Location Cloud Service user guide for more details.

**Find Nearby Resources in Map View**

If you want to move an activity, you can view nearby bucket resources to find someone who can take the job.

1. Select a resource from the resource tree.
2. Click **Map View**.

   The map shows the resource’s route for the day and a list of the scheduled and non-scheduled activities. If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown.

3. Click **View**.

   The view menu opens.

4. Select the **Show Nearby Resources** check box.

   The screen resets to show the other bucket resources in the area.
5. Click any icon to see details about that bucket resource, including name and contact information.
View the Traffic Layer in Map View

You can view the real-time traffic data on **Map View** to determine the best route to take to reach your destination.

1. Click **Map View**.
2. Click **View** and select the **Show Traffic** check box.

The **Show Traffic** check box is displayed if the **Use real-time traffic data** check box is selected on the **General** tab of the **User Type** screen. If you select a past date or a future date on Layer Switcher, the **Traffic** layer caption becomes inactive. After selecting the **Traffic** option, if you navigate to another screen from the **Map View** and navigate back to the **Map View**, the **Traffic** option will be deselected.

**Note:** Traffic information will vary based on the map provider’s data availability, which may not be available in all countries/areas/states/provinces/localities. Please check the map provider’s website for data availability. When the traffic data is available, the application uses the most recent information available from the map provider, which may not always be the current information.

View Resources and Activities in Two Panels

Both the upper and lower panels within the **Time view** have their own controls and can be operated independently. Since the resource tree can be accessed independently from each panel, you can compare availability in two sections of the Tree at the same time.

1. Open the resource tree.
2. Click the resource that you want to view in the top panel.

   The resource’s schedule displays in the work area.

3. Click the plus icon to open the bottom panel.

   The initial display in the bottom panel reflects the top panel.

4. Use the search fields and horizontal and vertical bars to manipulate the display in each panel to meet your needs.
5. Use the bottom panel to drill down while retaining the “bigger picture” in the upper panel or operate the two panels independently by simultaneously investigating availability in more than one section of the tree, as shown in the following figure:
If you want to find an available resource for an unassigned activity, view the bucket in the top panel and the resource’s scheduled activities in the bottom panel.

**Use Filters in Daily View**

The **Daily View** helps dispatchers or managers manage resource calendars efficiently. It provides a weekly calendar snapshot for the selected resource, bucket or group.

You can view a separate calendar by day for each resource or you can view a calendar for an entire organization unit or a bucket. Use the check boxes on the **View** drop-down to display additional information in the Daily calendar view, as shown in the following figure:

![Daily View screenshot]

Options available in the **View** drop-down list:

- **Apply hierarchically**: Shows all data within the hierarchy.
- **Shifts**: The shift in which the resource is working.
- **On-call**: Filters out resources available for on-call activities, if used.
- **Points**: Displays the points available during that shift, if used.
- **Routes**: Displays two numbers underneath each day of the resource’s calendar. The first number indicates the number of pending activities for the day and the second number indicates the total number of activities for the day.
- **Zones**: This shows the **Work Zone** that a resource is able to work in for the given day.
- **Inactive Resource**: This is used if you are viewing a group or bucket. When checked, it displays resources that have the week off for vacation, leave of absence, etc.
- **Work Skills**: Displays the work skills of technicians.

**Activity Details Screen**

The **Activity details** screen provides detailed information about an activity. The tabs that run across the lower portion of the screen organize these details based on the needs of your configuration.
The following figure shows the Activity details screen with the Customer info, Service info, PAS, Equipment, Resource Preferences, Message, History, and Links tabs:

The lower section of the activity details screen is a set of tabs containing specific information about Preferences, Messages, History and Links. This section can be configured to your company’s requirements and may include additional custom tabs, such as Customer and/or Service Info, Inventory, Required inventory and others designed to meet the special needs of your configuration.

Inventory Tab

For configurations that use inventory, the Inventory tab displays the serial numbers of any equipment that is either installed at the service address or required to complete the activity. This screen can also be used by the dispatcher to change (increment or decrement) equipment on behalf of the resource working at the service location.

The following figure shows the Inventory tab:
The **Inventory** tab may include the following information:

- **Serial Number:** A unique number that identifies a piece of equipment and (usually) its manufacturer. A house icon indicates the equipment is located on the customer’s premises; a truck icon indicates it is in the resource’s truck.

- **Pool:** A grouping of inventory by location and/or condition, such as installed/deinstalled. The term "pool" is fluid and may sometimes be used to indicate ownership, such as a resource pool.

- **Actions:** Links for the types of actions that may relate to this specific inventory. These links will vary based on your company’s configuration.

**Resource Preferences Tab**

The **Resource Preferences** tab lists any preferences or restrictions regarding the resource that should complete this activity.

Resources listed here will be in one of three categories:

- **Required:** Only one of these resources can be assigned the job.
- **Preferred:** If no Required resources are listed, then Preferred resources will have priority over everyone else.
- **Forbidden:** Resources that cannot be assigned to the activity.

**Messages Tab**

Messages that can be seen in this tab include:

- **notification:** messages sent to the customer and/or resource.
- **Messages sent to or received from an external system.**

Obsolete messages and messages in final statuses are removed from the message queue. No ‘day of event’ or ‘day of route’ messages are generated for non-scheduled activities. Messages that use the set property delivery channel (method) are shown in this view only if they were generated less than one (1) hour ago. The only exception from this rule is for messages having the Failed status. Such messages are important for troubleshooting, so they do not have the one (1) hour expiration time.

You can filter the types of messages that are visible by using the **Message Status**, **Message Type**, and **Recipient** drop-down menus.

Follow these steps to view all of the messages associated with this activity:

1. Select the word “any” from a drop-down to view all messages.
2. Click **Search**. The screen resets, displaying all messages, as shown in the following figure:

   ![Message Details](image)

   **Time:** Indicates the day and time that the message was issued. If it is in the future, then the time listed indicates when the message will be sent to the customer.

   **Method:** The method by which the message is sent. For example:
   - Voice – telephone or voice call.
   - SMS – SMS text message.
Trigger: Indicates the previous action that triggered the message.

Scenario (Step): Details on the message sent.

Status (Description): Indicates whether the message was successfully sent or not. If a message was successfully sent, this column displays Delivered or Sent. If not, the column displays Failed and a reason will be included.

Address: The phone number or e-mail address where the message was sent. If this column says External system, it means the message was sent to the external billing system.

equipment S/N: The serial number of any equipment referenced.

Time Delivered: The time the message was delivered.

History Tab
This tab displays all the events associated with this activity from the time it was received through completion. This is not an address history but a record of the changes and movement of the activity, time stamped with the user ID. The changes and movement are recorded automatically by the application. This tab is useful for dispatch when researching issues or problems with an activity. The filter and search options available in the column header help you sort quickly. The user name links to a dialog that shows the interface in which the action was performed and the details of the device with which the action was performed.

The following figure shows the History tab:

![History Tab Example]

Links Tab
Some activities depend on the timing of others that may be performed by different resources in a different location. For example, before one resource can activate a telephone, another resource that he or she has never met may have to flip a switch at a remote location. The options under the Links tab can enable these activities to be connected and sequenced chronologically.

The following figure shows the Links tab with the existing links:
If you click **Add link**, you will have the option to link that activity to another in chronological order, as shown in the following figure:

Search for the other activity by selecting a search option from the drop-down list and entering at least three characters.

### Required Inventory Tab

For configurations that use inventory, the **Required Inventory** tab displays the equipment, if any, that is necessary to complete this activity. This screen can also be used to add, delete, or edit required inventory.

<table>
<thead>
<tr>
<th>Model</th>
<th>Inventory Type</th>
<th>Quantity</th>
<th>Qty Available</th>
<th>Qty Installed</th>
<th>Missing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>Internet</td>
<td>1</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HDMI Cable 12ft</td>
<td>HDMI Cable 12ft</td>
<td>25 qty</td>
<td>23 qty</td>
<td>2 qty</td>
<td></td>
</tr>
<tr>
<td>RG6 - WHT</td>
<td>RG6 - WHT</td>
<td>150 ft</td>
<td>1080 ft</td>
<td>20 ft</td>
<td></td>
</tr>
</tbody>
</table>

### Search Filters

You can use the default search filters to narrow down search results. You can also create custom filters.

For example, suppose that managers must be able to view a list of completed activities where the customer could potentially be a “detractor” of the business. The conditions for this would be that the customer entered a score of 2 or less on their
post-activity survey for this question: “Based on this visit, how likely would you be to recommend our company to friends or family?”

Add a Filter to the Filter List
You can add a filter to use customized words in search filters.

1. Click Configuration, Filters.
2. Click Add new in the upper right corner of the screen, as shown in the following figure:

   ![Add filter dialog](image)

3. Fill in the fields in the Add Filter pop-up window.
   The following figure shows the Add filter dialog:
### Dispatcher Activities

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter</td>
<td>Enter the name of the filter. This name is what users will see when they select the Filters drop-down menu.</td>
</tr>
<tr>
<td>Language</td>
<td>Select the appropriate language from the drop-down menu.</td>
</tr>
<tr>
<td>Applicable to entity</td>
<td>Select Activity or Resource.</td>
</tr>
<tr>
<td>List/Time/Map/Daily</td>
<td>Check this box if you want the filter to appear in the Filters drop-down list in the Actions pane.</td>
</tr>
<tr>
<td>Routing</td>
<td>Check this box if you want the filter to appear in the Routing Filters list associated with a route plan.</td>
</tr>
<tr>
<td>Restriction</td>
<td>Check this box to prevent activities from appearing if routes have not been activated or the work day has not yet begun. It also provides the ability to hide some activities in buckets.</td>
</tr>
<tr>
<td>User Type</td>
<td>Select the user types that have access to this filter. For example, if this filter is used for routing, the user type for the person who performs routing must have permission to access the filter.</td>
</tr>
</tbody>
</table>

4. Click **Add**.

   The new filter appears in the Filters list.

Add a filter condition for the newly created filter. A filter does not work if there is no condition specified.

**Related Topics**

- Add a Filter Condition

### Add a Filter Condition

Use conditions to define the activity you are searching for.

1. Click **Configuration, Filters**.
   
   The Filters screen is displayed.

2. Locate the filter you want to add a condition to.

3. Click **Conditions** in the Actions column.

4. Click **Add New** at the top of the screen.

   The Add filter condition dialog appears.

5. Complete the following fields:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field</td>
<td>Choose one or more activity or resource-based criteria on which to base the filter.</td>
</tr>
<tr>
<td>Dynamic</td>
<td>Select the box if you want the user to type a value for the field that the condition is for.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Select one or more options to represent how the field selected above relates to the Value entry.</td>
</tr>
<tr>
<td>Value</td>
<td>These are the options that can be associated with the Field chosen for this condition. If multiple values are applicable for this condition to be met, then add them to the Selected column. From the list of available values, click to select and then click the &gt;&gt; button. The selected item moves to the Selected column.</td>
</tr>
</tbody>
</table>
6. Click Add.
7. Navigate to the Work Area and verify that the filter is listed in the View drop-down menu.
8. Test the filter to ensure that it meets your requirements.

Delete a Filter

When you do not need a filter anymore, you can remove it from the application.

1. Click Configuration. Click Filters from the Displays section.
2. Select the check boxes next to the filters that you want to delete.
3. Above the list of filters, click Delete.
4. Click OK.

Alerts

This section includes the following topics:

- Activity Alerts
- Resource Tree Alerts

Activity Alerts

You see alert messages when you move activities. These messages guide you through the process. The following alerts are available:

Overtime Alert: This alert notifies you that the estimated completion time of the activity extends beyond the end of a resource’s working day.

Soft Skill Mismatch Alert: This alert displays when you move an activity to a resource that does not have the preferable qualification level of an activity skill.

Work skill Mismatch Alert: This alert displays when you move an activity to a resource that does not have the required and preferred qualification level of an activity skill. Depending on your settings, the Work Skill Mismatch Alert either prevents you from moving the activity, or gives you the option to move it or to cancel the move.

Do Not Move Alert: This alert displays when you try to move an activity type that is not allowed to move between resources. Activity types are configured in the Add activity type page.

Resource Tree Alerts

Resource tree alerts give you information about the status of a resource or route. Alerts appear next to the resource icon in the resource tree.

Alerts are displayed for all parent items in the resource tree up to the root resource (bucket or group). If the root resource has an exclamation mark, this means that at least one child resource has an alert. After the issue is resolved, all of the related alerts are removed.

Pointing to a resource’s icon displays a Hint that provides a list of all warnings.
There is a problem with the resource or the route. Possible reasons:
- The resource has not activated his or her route on time.
- A pending activity is very close to the end of the serviceWindow and the resource is likely to be late.
- A pending activity has an ETA that occurs in the past.
- The resource has stopped reporting.

The resource is not configured and cannot be used properly. Possible reasons:
- The Time zone is not set correctly for this resource.
- The calendar is not configured properly for this resource.

There is a problem with one or more of the resources located within this bucket. Possible reasons:
- One or more resources have not activated his/her route on time.
- One or more pending activities is close to the end of the service window and the resource is likely to be late.
- One or more pending activities has an ETA that occurs in the past. Resource is not reporting.
- The resource has stopped reporting.

There is a problem with one or more of the resources located within this bucket. Possible reasons: The Resource has a non-working calendar, or is inactive with pending activities on the route.

Pointing to a bucket/group’s icon displays a Hint providing a list of all warnings.
Click on the icon next to the resource name to see a detailed list of all warnings, which are displayed in a Hints window.

The following resource tree alerts are available:

- Losing service window: This alert can mean one of two things:
  - The activity is scheduled after the end of service window.
  - The activity has not been started within the predefined amount of time before the service window expires.

- Stopped reporting: This alert indicates that the activity did not start on time. It appears for pending ordered activities in activated queues that belong to the current working day.

- Not activated on time: This alert indicates that the resource did not activate his or her queue on time.

- Misconfigured calendar: This alert appears if a resource’s calendar is configured incorrectly, for example when the resource is assigned two working calendars.

- Smart Location Alert: This alert indicates that the current location for a resource has not changed in a predefined amount of time.
Dispatch Console Activities

Use Dispatch Console to monitor the field and assign activities to technicians.

The following table lists some of the tasks you can perform:

<table>
<thead>
<tr>
<th>Dispatcher Activities</th>
<th>Dispatcher Activities continued...</th>
<th>Dispatcher Activities continued...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an activity</td>
<td>Print an activity</td>
<td>Add a multi-day activity</td>
</tr>
<tr>
<td>Edit an activity</td>
<td>Export activity details</td>
<td>View and edit a multi-day activity</td>
</tr>
<tr>
<td>Delete an activity</td>
<td>Add an activity to a shift</td>
<td>Start a multi-day activity</td>
</tr>
<tr>
<td>Cancel an activity</td>
<td>Create an activity link type</td>
<td>Complete a multi-day activity</td>
</tr>
<tr>
<td>Activate a route</td>
<td>Link an activity</td>
<td>Cancel a multi-day activity</td>
</tr>
<tr>
<td>Start an activity</td>
<td>Change the activity status on behalf of a resource</td>
<td>Reopen a multi-day activity</td>
</tr>
<tr>
<td>View activity details</td>
<td>Activate a Queue or Route</td>
<td>Move a Multi-Day Activity Between Resources or Dates</td>
</tr>
<tr>
<td>View the directions for an activity</td>
<td>Start an activity</td>
<td>Move a Multi-Day Activity Between Non-Scheduled Pool</td>
</tr>
<tr>
<td>Select a resource for an activity</td>
<td>Add time to an activity</td>
<td>Move a Multi-Day Activity in a Bucket</td>
</tr>
<tr>
<td>Search for an activity</td>
<td>Complete an activity</td>
<td>Reorder Multi-Day Activity Segments Within a Route</td>
</tr>
<tr>
<td>Move an activity</td>
<td>Suspend an activity</td>
<td>Adjust Activity Duration</td>
</tr>
<tr>
<td>Add a mass or repeating activity</td>
<td>Deactivate a route or queue</td>
<td>Adjust Segment Duration</td>
</tr>
<tr>
<td>Add a pre-work activity</td>
<td>Move a group of activities</td>
<td>Use the Assign to Team Function</td>
</tr>
<tr>
<td>Suspend an activity</td>
<td>Change activities in groups</td>
<td>Assign Teamwork Using the Drag-and-Drop Function</td>
</tr>
<tr>
<td>Reopen an activity</td>
<td>Cancel activities by group or team</td>
<td></td>
</tr>
</tbody>
</table>

Add an Activity to a Route or a Bucket

While activities are usually added to routes through the routing process, you can manually add an activity to a route or a bucket. This feature is helpful when you must set aside some time for a resource so that the application does not route any activities during that time.

1. Click the hamburger icon and then click Dispatch Console.
2. Select a resource or a bucket from the resource tree.
3. Click the actions button and select Add Activity from the drop-down menu.
   The Add Activity screen displays.
4. Select the activity type from the Activity Type drop-down list.
   The fields on the screen change based on the activity type that you select.
5. Complete the applicable fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Type</td>
<td>Select the activity type from the Activity Type drop-down list.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter the customer’s name. Used for customer-facing activities only.</td>
</tr>
<tr>
<td>Work Order</td>
<td>Enter the work order number associated with this activity.</td>
</tr>
<tr>
<td>Duration</td>
<td>Enter the amount of time that the activity lasts. Select the hours and minutes in the respective drop-down lists.</td>
</tr>
<tr>
<td>Position in Route</td>
<td>Choose an option to decide whether this activity is to be performed in a particular order.</td>
</tr>
<tr>
<td></td>
<td>- Not Ordered means that the activity is not ordered, and appears as scheduled/not ordered the lower portion of the time view interface.</td>
</tr>
<tr>
<td></td>
<td>- Ordered means that the activity is displayed on the resource’s route. If you specify a time slot, the activity displays in that time slot. Otherwise, it displays as pending at the beginning of the route.</td>
</tr>
<tr>
<td>Time Slot</td>
<td>Select the period of time within which this activity can be started.</td>
</tr>
<tr>
<td>Access Hours</td>
<td>Select the time interval during which the related asset is accessible. Click the pencil icon to select the access hours.</td>
</tr>
<tr>
<td>Access Schedule</td>
<td>Select the days of the week during which the related asset is accessible. Click the pencil icon to define the access schedule. You can schedule two intervals per day.</td>
</tr>
</tbody>
</table>

6. Click OK.

Related Topics
- Access Hours

Access Hours

Access Hours define the intervals in which an asset such as a building or equipment is accessible for resources. Access Schedule is the exact time interval and the days on which the asset is accessible. Access Schedule is always set up in the activity time zone and the Access Hours field is calculated in the time zone of the Activity Provider. So, the Access Hours field is recalculated every time an activity is scheduled or assigned.

Access Hours consist of a set of access schedule intervals (up to two intervals per week day), and a set of exception dates. The exception dates are treated as non-working. For Example: You can set the following Access Schedule:

- Mon-Fri: 8AM-12PM, 13PM-17PM
- Sat: 10AM-12PM
- Exceptions: 2018-01-01, 2018-05-01

This means that the asset is accessible from 8 AM till 12 PM and from 13 PM till 17 PM, Monday to Friday and from 10 AM till 12 PM on Saturday. It is closed on Sundays. The non-working days are January 1st and May 1st next year.

The Access Hours and Access Schedule fields affect routing. When activities are created, routed, and moved, the Access Hours and Access Schedule are taken into consideration. If the access hours and access schedule are not within the activity schedule, the application displays an alert. If the activity is within the Access Schedule, it is assigned to a free slot in the provider queue adjusting the Access Schedule if possible. Otherwise an alert that the asset may not be accessible beyond the defined access hours is shown.
Access Hours are recalculated when there is a change in the access schedule or the schedule of the activity. Access Hours are always shown in the provider time zone with respect to overnight settings. For example, if a company has overnight set to 5 hours and no access schedule is defined (that is, 24x7 access), Access Hours is calculated as 05AM-12PM, 12PM-05AM. If tomorrow is the exception date, only the today’s segment is shown (that is, 05AM-12PM). If the exception date is today, only the tomorrow segment is shown (that is, 12PM-05AM).

Note: Access Hours are not supported for multi-day activities. They are neither followed for the first segment nor inherited for any multi-day activity segment.

Interpreting Access Hours

The following rules are used to interpret a schedule:

- Empty schedule (or no schedule at all) and empty exception dates (or no exception dates at all) means no restriction, or 24x7 availability.
- Empty schedule (or no schedule at all) and some exception dates filled means 24x7 availability except exception dates, and not available on exception dates.
- Schedule includes all seven days (and may be some exception dates filled) means the availability is defined by the schedule for the given week day, and the asset is not available on exception dates, if any.
- Schedule includes some, but not all seven days (and may be some exception dates filled) means the availability is defined by the schedule for the given week day, if it is defined. The asset is not available on the week days for which no schedule is defined; also, the asset is not available on exception dates, if any.

Set an Access Schedule to an Activity

While Access Schedules are usually added to an activity during the activity creation process, you can manually set an Access Schedule to an activity.

1. Open the Activity details screen for the activity for which you want to add an Access Schedule.
2. Click the pencil next to the Access Schedule field.
   The Access Schedule editor opens.
3. Choose the days of the week for which you want to set the Access Schedule. Use the "+" and "-" icons to add and delete Access Schedule Intervals.
   You can set up to two Access Schedule Intervals per day of the week. If multiple days of the week have the same Access Schedule, you can set up the Access Schedule Intervals for all of them at once.
4. To add the days on which the asset is not accessible, click the "+" icon in the Exception Days section and then choose a date in the calendar. To delete an Exception Day, use the "-" icon.
   For Example: You can set the following Access Schedule:
   - Mon-Fri: 8AM-12PM, 13PM-17PM
   - Sat: 10AM-12PM
   - Exceptions: 2018-01-01, 2018-05-01
   This means that the asset is accessible from 8 AM till 12 PM and from 13 PM till 17 PM, Monday to Friday and from 10 AM till 12 PM on Saturday. It is closed on Sundays. The non-working days are January 1st and May 1st next year.
5. Click Apply.
   The Access Schedule is saved.
Edit an Activity

You can see the overview of an activity in the Dispatch Console. To view or edit the details of the activity, you must go to the Activity details screen.

1. Click the hamburger icon and then click Dispatch Console.
2. Click the bucket or resource for which you want to view the activities.
   
   The list of activities is displayed for the selected bucket or resource.
3. Hover over the activity for which you want to view the details.
   
   The activity hint appears.
4. Click Details in the hint.
   
   The Activity details screen appears.
5. Edit the required fields and click Submit.
   
   The activity details are updated.

Cancel an Activity

You can only cancel pending activities.

1. Click the hamburger icon and then click Dispatch Console.
2. In the resource tree, select the resource for which you want to cancel the activity.
3. Click the activity that you want to cancel and click Cancel in the activity hint.
4. On the Cancel Activity screen, complete all required fields and select a Cancellation Reason from the drop-down list.
   
   The fields on this screen vary based on the way the application is configured for your organization.
5. Click OK.
   
   The activity is removed from the time view, but still appears in the list view with a small block of time.

Search for an Activity

You can search for an Activity using the Search option. The same option can be used to search for inventories and parts.

1. Click the magnifying glass to open the search field.
2. Enter at least three characters of the word or the numerical value you want to search in the text box:
The results display below the search field.

3. Click the result to view the **Activity Details**.

**Navigation in Search**

When you search for an item from Activity, Inventory, or Parts Catalog, the relative results appear on the screen.

If you open search from Landing page, search for Activity details and click the Back button, you will be navigated back to the Landing page. Similarly, if you open search from Manage screen and search for Activity details, Inventory details, etc. and click the Back button, you will be navigated back to the Manage screen.

> **Note:** You cannot initiate a inventory/parts search from the Manage view.

**Narrow Activity Search Results**

You can use **Search Preferences** to narrow and order the search results. **Search Preferences** are pre-configured by your administrator.

1. Click the gear icon to view the search preference.
2. Click the check boxes next to the options that you wish to search by from the **Search Preferences** menu, as shown in the following figure:
The Search Preferences section also contains Inventory search fields along with other search fields configured in the Business Rule.

3. Drag and drop the categories in the list to change the priority of the preferences in the search results.
4. Select the date range for the search results from the Date drop-down menu.
5. Click Back to search and enter the search value.

Search in Offline Mode

You can search for Parts and Inventory in offline mode.

But, you cannot search for activities in offline mode.
Recent Searches

You can view the last five recent searches in Search box.

You cannot view the last five recent searches if you login from a new session.
Overview of Moving Activities

When you identify an activity or group of activities that are in jeopardy, you can move the activities to another resource or to a bucket for re-assignment at a later time.

You can move activities from three different locations in the interface:

- **List view**: You can move one activity or multiple activities at once. The application proposes resources that might be a good match for the activity. You can also choose where a new activity will fall in the new resources schedule.
- **Time view**: From this view, you can drag an activity from one resource to another. You can move only one activity at a time. The application chooses the best time in the resource’s schedule and automatically moves the job to that time slot.
- **Map view**: From this view, you can drag an activity from one resource to another. You can move only one activity at a time. The application chooses the best time in the resource’s schedule and automatically moves the job to that time slot.

Here are some of the reasons for which you want to move activities from resources back to the bucket:

- A resource called in sick and you have already assigned him or her a route.
- A resource is assigned activities that might place him or her in an overtime situation.
- An activity is in jeopardy after routing.
- A resource requested a particular day off, but the calendar does not reflect it as a non-working day and a route has already been assigned to him or her.

**Related Topics**

- Move an Activity in the List View
- Move an Activity in Map View
- Move an Activity in the Time View

**Move an Activity in the List View**

When you are in the **List view**, you can move an activity between resources using the **Move** link in the **Hints** box.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Click **List** on the **Switch View** tab.
3. Select the group or bucket that contains the activity.
   All of the resource’s activities are displayed in the **Work Area**.
4. Select the activity that you want to move. If you want to move multiple activities at once, select all of the activities now.
   The **Hints** box displays.
5. Click **Move**.
   The **Move** activity screen appears. The address of the activity and the work order number displays at the top of the screen. A list of available resources displays to the left.
6. Select the new owner from that list.
   - Choose a resource if you want to assign the activity now.
Choose a bucket if you want the activity to be reassigned during the next batch assignment.

On the right side of the screen, the moved activity displays in the new resource’s route.

If the activity displays in green or there is no comment in the Comments column, the new resource is projected to arrive at the customer’s location within the service window. If the activity displays in red or a comment is displayed in the Comments column, the new resource might miss the service window. If other activities are showing in red, the new activity jeopardizes the red activities; the Comments column displays the reason. When activities turn red, another resource may be a better choice.

7. Click OK when you are satisfied with the move.

Move an Activity in Map View
When you are in Map View, you can move an activity between resources using drag and drop.

1. Click the hamburger icon and then click Dispatch Console.
2. Click the Map tab.
3. Select the resource from which you want to move the activity.
   The resource’s schedule displays in the Work Area.
4. On the route list on the right side of the screen, select the activity that you want to move.
5. Drag and drop the activity onto the new resource in the Resource Tree.
   If the box is red, the resource is not available for work.
   When you drag the activity over the resource, a box appears around the resource’s name. If the box is green, the resource is available to take the job.

Move an Activity in the Time View
You can move activities between resources in the Time view using drag and drop.

1. Click the hamburger icon and then click Dispatch Console.
2. Click Time view.
3. Select the resource from the resource tree that you want to move the activity from.
   The resource’s schedule displays in the work area.
4. Find the activity that you want to move, then drag it onto the new resource.
When you drag the activity onto a new resource, the application checks the move against the route to identify potential problems. If the application does not detect any potential problems with the move, the activity is added to the timeline. The application chooses the time slot automatically based on system information. If the application detects a problem, a Move dialog displays an alert. You can either move the activity anyway, or move it to another resource.

When you drag the activity over the resource, a box appears around the resource’s name. If the box is red, the resource is not available for work. If the box is green, the resource is available to take the job. The box displays some text indicating whether the activity can be moved, as shown in the following figure:

![Resource Availability Box](image1)

The following figure shows a red box around the resource who is not available for work, and the reason for the activity not being moved:

![Activity Warning Message](image2)

### Move Activity Warning Messages

This topic describes the warning messages that you would encounter while moving activities.

You may encounter the following types of warning messages:

- Service window warning
- SLA warning
- Overtime warning
- Linked activity warnings
  - Has successor scheduled earlier
  - Has predecessor scheduled later
  - Has simultaneous activity
- Work zone mismatch
- Work skills mismatch
• Soft skill mismatch

Linked activity warnings

The warnings related to linked activities are as follows:

• Has successor scheduled earlier: This warning appears for a pending activity linked to another activity that should be started after but is scheduled before its estimated completion.
• Has predecessor scheduled later: This warning appears for a pending activity linked to another activity that should be finished before but is scheduled after its estimated start.
• Has simultaneous activity: This warning appears for a pending activity linked to another activity that should be started simultaneously but is scheduled to a different time.

Overtime alert: This alert notifies you that the estimated completion time of the activity extends beyond the end of a resource’s working day.

Work Zone mismatch alert: The application doesn’t allow you to assign an activity to a resource without a required work zone. The only exception is when the All check box is selected. In this case, the resource is shown in red and the “Work zone mismatch” alert appears in its hint.

Work skill mismatch alert: This alert displays when you move an activity to a resource that does not have the required and preferred qualification level of an activity skill. The only exception is when the All check box is selected. In this case, the resource is shown in red and the "Work skill mismatch" alert appears in its hint. Depending on your settings, the Work skill mismatch alert either prevents you from moving the activity, or gives you the option to move it, or let you cancel the move.

Soft Skill mismatch alert: If an activity is to be moved to a resource and a work skill level of this resource is more than (or equal to) the level ‘required’ to complete this activity, but less than the ‘preferred’ level, the ‘Soft skill mismatch’ alert appears. In case of the ‘Soft skill mismatch’ warning, the resource is not removed from the list of available resources on the Move activity screen (the All check box doesn’t affect this behavior). But, it is shown in a different color (blue) than a regular one and the ‘Soft skill mismatch’ text is shown in its hint message. The ‘preferable’ skill level is ignored by the ‘Self assignment’ constraint that is used to filter activities in bucket. In this case the ‘required’ level is only checked. The ‘Soft skill mismatch’ warning is shown on attempt to move an activity to a technician with an insufficient ‘preferred’ skill level.

Do not move alert: This alert displays when you try to move an activity type that is not allowed to move between resources. Activity types are configured in the Add activity type page.

Resource preferences

• If an activity has a list of Forbidden resources, the application doesn’t allow to assign it to one of these resources. They are not shown in the GUI (regardless of the "All" option).
• If an activity has a list of Required resources, these resources are only shown in GUI (regardless of the "All" option).
• If an activity has a list of Preferred resources, these resources are shown in GUI by default. Other resources are returned if the All option is set. In this case such resources are shown in red and the Resource is not preferred message appears for the activity to be moved.

If several activities are selected to be moved at the same time, the following rules are used to merge their lists of preferred resources:

• Forbidden
  o The resulting list of the Forbidden resources is a union of the original activity lists.

• Required
  o If activities to be moved have the Required resources, the result is an intersection.
Activities without the Required list are not processed. If only one of the two activities has the Required list, this list is only used in the restriction.

- If two activities have the Required lists and these lists are not intersected, all the activities cannot be assigned together to the same resource.

• Preferred

- If any of the activities has the Required list, the Preferred resources are ignored.
- The result Preferred list is calculated as an intersection.
- Activities without the Preferred list are not processed. If only one of two activities has the Preferred list, this list is only used in the restriction.
- If two activities have the Preferred lists and these lists are not intersected, all the activities cannot be assigned together to the same resource (can be overridden using the All option).

Group Operations

The Group Operations feature makes it easy to perform the same action on multiple activities simultaneously. For example, this feature could be used when a resource calls in after routing has run for the day. The activities for that day can be placed back into the bucket all at once to be routed to other resources.

Move a Group of Activities

When a group of activities is at risk, you can move it to avoid the service window being missed.

You must work in List view.

1. Click the hamburger icon and then click Dispatch Console.
2. Select the resource or bucket from the resource tree.
3. Select multiple activities in the first column of the Work Area or select the Select All check box.

4. Click Move from the top of the Work Area.
5. To see a list of all resources and buckets, select the check box next to All.
The **Move** dialog appears, and the screen populates with resources and buckets available. The items to be moved will display in the selected resource’s/bucket’s route.

If moving the activities will cause either them or subsequent activities on the route to jeopardize their service window, the activities display in red. Such activities also have appropriate comments in the **Comments** column. If moving the activities does not cause any jeopardy, then the activities appear in green.

- If the desired resource or bucket is visible, select it.
- If not, then search for the resource or bucket from the **Find** box.
6. Once you are satisfied with the proposed changes, click **OK** to complete the move.

**Change Activities in Groups**

You can make changes to multiple activities at once.

The **Group Change** option must be enabled for your user type.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Open the **List view**.
3. Select a resource or bucket from the resource tree.
4. Select the items that you would like to change.
5. Click **Change** link from the top of the Work Area.
   - The **Change group of activities** dialog displays a list of parameters that you can edit.
6. Once you have confirmed your changes, click **OK**.

**Cancel Activities by Group or Team**

If a customer has canceled a site visit, you can cancel the activities that was assigned to the team that was scheduled to visit the customer.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select the team for which you want to cancel the activity in the resource tree.
3. Select the items that you want to cancel.
   - Ensure that all items can be cancelled. Only pending and started items can be cancelled.
4. Click **Cancel** from the top of the **Work Area**.
   - The **Cancel group of activities** dialog appears.
5. Use the drop-down menu to select a **Cancellation Reason** and then add any pertinent notes.
   - The following figure shows the **Cancel group of activities** dialog:

   ![Cancel group of activities dialog](image)

6. Click **OK** to complete the cancellation of the selected items.
   - Cancelling a repeating activity or teamwork will only cancel it for the current day.

**Add a Pre-Work Activity**

You can add a **pre-work** activity for work that you want to complete in advance of another activity.

1. Click the hamburger icon and then click **Dispatch Console**.
In the resource tree, click the resource for which you want to assign the pre-work.
3. In the work area, click the activity that requires pre-work.
   The activity hint is displayed.
4. Click **Prework** in the activity hint.
   The **Start Prework** screen displays.
5. Select the time required to complete the pre-work activity in the **Duration** field.
   The duration of the pre-work is the duration you have added here and not the one calculated automatically.
6. Click **OK**.
The pre-work activity is added to the route.

### Add a Mass Activity

When you create an activity for one resource that you would like to use for other resources, you can create a *mass activity*. For example, if all the technicians are required to attend a training, you add a mass activity.

1. Add an activity to a resource as you normally would.
2. Complete the Activity Notes, Position in Route, Duration, SLA Start, SLA End, and Time Slot fields.
3. Click **Mass activity**.
   The **Mass activity** check box is displayed only for the activity types for which it is configured.
4. Click **Add new**.
   The resource tree displays.
5. Select the resources that you want to be part of this activity.
6. Click **OK**.
   The activity is assigned to all the selected resources.

### Add a Repeating Activity

You can create activities that appear on a resource’s route repeatedly for a specified period of time. Examples of repeating activities include meetings and lunch breaks.

1. In the resource tree, select the resource that you want to assign the repeating activity to.
2. Click **Actions**.
3. Select **Add Activity** from the drop-down menu.
4. On the next screen, select the **Activity Type** and the **Duration**.
5. Select the **Repeating activity** check box.

   ![Repeating activity](image)

   a. Specify how frequently you want the activity to repeat in the **Recurrence** field.
b. Depending on your selection in the **Recurrence** field, fill up the **Days between occurrences** or the **Weeks between occurrences** fields.

c. Enter a start date for the activity in the **From** field.

d. Optionally, enter an end date in the **To** field.

e. If you have selected **Repeat weekly**, select the day of the week on which you want the activity to repeat.

The days displayed here are based on the **First day of the week** setting in the **General** section of the **Display Configuration** screen.

7. Click **OK**.

### Duration for Suspended, Reopened, and Pre-Work Activities

You can set the duration for suspended, reopened, and pre-work activities manually. This helps while estimating the remaining duration—it shows the additional work that is needed to complete the activity.

The Administrator must add the **Duration** field for the **Suspend activity**, **Reopen activity**, and **Start prework**, context layout screens with a Read-Write or Mandatory visibility. When the user opens these screens, the application populates the **Duration** field with the activity’s initial value. Users can manually modify this value, which has the following impact:

- The new pending activity is populated with the value submitted on the **Suspend activity** screen.
- Prework is populated with the value submitted on the **Start prework** screen.
- The reopened activity is populated with the value submitted on the **Reopen activity** screen.

### Add an Activity to a Shift

When you add an **activity** to a **shift**, the activity is added to the calendars of all of the resources that have that shift assigned to them.

1. Click the hamburger icon and then click **Configuration**.
2. Click **Work Schedules, Shifts**.

   The **Shifts** list displays.

3. Click the **Activities** link in the row of the shift that you want to add the activity to.
4. Click **Add Activity**.

   The **Add Activity** screen displays. If this activity is an internal activity, the layout of the screen changes. If it is a customer-facing activity, the layout stays the same.

5. Complete the applicable fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Type</td>
<td>Select the <strong>activity type</strong> from the <strong>Activity Type</strong> drop-down list.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter the customer’s name. Used for customer-facing activities only.</td>
</tr>
<tr>
<td>Work Order</td>
<td>Enter the work order number associated with this activity.</td>
</tr>
<tr>
<td>Duration</td>
<td>Select the number of hours and minutes that the activity lasts.</td>
</tr>
<tr>
<td>Position in Route-Not Ordered</td>
<td>The activity is not ordered, and appears as <strong>scheduled/not ordered</strong> in the lower portion of the time view interface.</td>
</tr>
<tr>
<td>Field name</td>
<td>Action</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Position in Route-Ordered</td>
<td>The activity is displayed on the resource’s route. If you specify a time slot, the activity displays in that time slot. Otherwise, it displays as pending at the beginning of the route.</td>
</tr>
<tr>
<td>Time Slot</td>
<td>Select the period of time within which this activity can be started.</td>
</tr>
<tr>
<td>Activity Notes</td>
<td>Enter any notes associated with this activity.</td>
</tr>
<tr>
<td>Recurrence-Repeats-Daily</td>
<td>Apply to schedules such as every other day or every 3rd day. If you select this option, add the frequency of occurrence in the field Days between occurrences.</td>
</tr>
<tr>
<td>Recurrence-Repeats-Everyday</td>
<td>Applies to every day schedules that repeat without exception and without any modification options.</td>
</tr>
<tr>
<td>Recurrence-Repeats-Weekly</td>
<td>Apply calendars that have a regular weekly pattern. Select the days that apply to this shift using the check boxes for the individual days. Indicate the frequency of this pattern weekly by adding a value to the Weeks between occurrences field.</td>
</tr>
<tr>
<td>Recurrence-Repeats-Yearly</td>
<td>Occurs every year from the selected date entered in the From day until the date entered in the To day field.</td>
</tr>
</tbody>
</table>

6. Click **OK**.

### Link Activities

The concept of linking activities applies to a variety of situations in which jobs and resources must be linked and sequenced together over time.

The following examples illustrate the diversity of linking activities:

- When a technician is assigned an activity that takes more than a day to complete, how do you make sure that activity continues to be assigned to him or her until it has been completed?
- A group of workers may be assigned to a series of activities related in such a way that the first one must be completed before the second can be started, and so on. What’s the most efficient way to keep that big job moving efficiently?
- And what about a necessary break in a task that creates a corresponding gap in a technician’s schedule? What can you do to make sure your resources remain productive while “waiting for the paint to dry”?

When activities are related serially over time or when routing relationships cause a break in the schedule, linking activities can be used to manage the link and restore efficiency.

The first step in linking activities is to create link types that correspond to the four linking relationships represented graphically on the **New Link** template. The next is to use those link types to link actual activities for Routing.

#### Linking activities automatically

Oracle Field Service Cloud can link two activities together based on the information you send to the application using APIs.

#### Activity Link Types

Activity link types identify the way that two or more activities can be linked together and specify the constraints, if any, that should be placed on assigning and scheduling resources.

Before you can link activities, you must create activity link types.
Activity link types are generic. You can reuse a link type to link various activities over time. In addition to the type of linkage (start-to-finish, etc.) consider more specific characteristics such as the interval between activities and any rules you want to make about assigning and scheduling those activities.

There are two types of activity links:

- Regular link type: This link type places the first activity in the schedule before the second activity.
- Reverse link type: This link type places the second activity in the schedule before the first activity.

The links that you create – both regular and reverse – will be available in the drop-down list that displays when you link activities.

The activity link type template shown below features four different linkages:

- Start-to-Start: Second activity starts after the first has been started.
- Finish-to-Start: Second activity starts after the first one has been finished
- Simultaneous: Both activities start at the same time.
- Related: The relationship between these two activities is not sequential.

Because each of these link types generates two different linking options — regular and reverse — your linkage "library" could begin with at least 8 different link types, further differentiated by the amount of time between activities and any assignment and scheduling constraints — such as same technician over two days, different technicians on the same day that you want to place on them.
Create an Activity Link Type

Before you can link activities, you must create activity link types. Activity link types define how the activities are linked for example, the minimum interval between activities, the constraints for scheduling activities, constraints for assigning activities, and so on.

1. Click the hamburger icon and then click Configuration.
2. Click Link Templates.
   The Link Templates screen appears.
3. Click Add Link Template.
   The New Link Template screen displays.
4. Select the graphic at the top of the screen that represents the way that you want to link the two activities.

5. Enter the Minimal Interval of time between the two activities in minutes (min).
6. Enter the Maximal Interval of time between the two activities.
   For example, if the minimal interval is five minutes, the maximal might be ten or more minutes.
7. Enter any Assignment Constraints that you want to place on assignments.
   There are two options: Different resources requires that the linked activities be assigned to two different resources. Same resource requires that both activities be assigned to the same resource.
8. Enter any Scheduling Constraints that you want to place on the days for which the activities are scheduled.
   There are two options: Different Days requires the activities to be scheduled for two different days. Same day requires they be scheduled for the same day.
9. Enter a Name and a Label for this link type.
   The name is what is displayed in the Web interface. The label is used by external systems when they submit information through the API.
10. Check the Active box in the Status field to make this link type available for use.
11. Click Save.

Link an Activity

You can link activities to make sure that they occur in a certain order when the routing is run. Activities you might want to link include a trip to the depot to pick up a piece of non-standard inventory prior to an installation or a job that involves multiple workers performing related tasks in a certain sequence. You can automatically link activities using the Inbound API.

Link Types must be created before you can link activities.

To link activities manually:

1. Click the hamburger icon and then click Dispatch Console.
2. On the resource tree, select the resource that has the first activity assigned to it.
   The resource’s activities display.
3. Click the first activity that you want to link.
   The activity hint displays.

4. Click Details to view the activity details.

5. Click Links

6. Click Add link.
   The Add link screen displays.

7. Select the type of link that you want to use from the drop-down list, that is, Start after.

8. Use the next field to search for the activity that you want to link to the first.

9. Click Link.
   The new link displays.

10. If an error message displays, hover over the error icon to review the error messages and make changes as necessary.
   Error messages may relate to the maximum and minimum intervals required by the link type you have chosen or to other scheduling and assignment constraints. You may have to create a new link type.

Non-Travel Activities

When an activity does not require travel (Calculate travel check box is cleared for the Activity type), the idle time before that activity is considered as travel to the next activity requiring travel in the route.

The travel between activities can be split into two (or more) pieces by inserting non-travel activities in between. As a result, in Time View, non-travel activities are placed over the travel time for activities that require travel. Non-travel activity may have a different location when compared to the previous travel-required activity (or provider start location), if a non-travel activity is placed over a travel-required activity.

To understand the concept better, consider the following sequence of activities:

- First activity: For example, installation requires travelling, ends at 10:00
- Second activity: For example, phone call doesn’t require travelling starts at 17:00 and ends at 17:10
- Third activity: For example, upgrade requires travelling; service window starts at 17:30 and ends at 18:00

Assume that the travel time between First activity and Third activity is 3 hours. The time line would be:

<table>
<thead>
<tr>
<th>Time</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00</td>
<td>First activity is finished</td>
</tr>
<tr>
<td>10:00 to 14:20</td>
<td>Idle time</td>
</tr>
<tr>
<td>14:20 to 17:00</td>
<td>Travel toward third activity</td>
</tr>
<tr>
<td>17:00 to 17:10</td>
<td>Second activity (phone call)</td>
</tr>
<tr>
<td>17:10 to 17:30</td>
<td>Continue travel toward third activity</td>
</tr>
<tr>
<td>17:30</td>
<td>Third activity started without any overdue and as early as the service window allows</td>
</tr>
</tbody>
</table>
\textbf{Note:} When you place a non-travel activity manually on a time interval that is occupied by the travel bar of a non-movable (for example, due to service window) travel-required activity, it can happen that the travel bar is partially placed before the actual time. In this case, we recommend that you place the non-travel activity to another place in the route.

Changing Activity Status for a Resource

This section includes the following topics:

- Activate a queue or route
- Start an activity
- Add time to an activity
- Complete an activity
- Suspend an activity
- Assign not-done status to an activity
- Deactivate a route or queue

Activate a Queue or Route

For the application to monitor delivery in real time and respond to updates, a resource must activate his or her queue, or route. In the event that the resource forgets to activate his or her queue on time, you can activate the queue and reset the actual time for the resource.

To re-set the queue activation time, the user type for the user performing the re-set must have this permission. You can only reset the queue activation time if the queue is not activated. To activate a queue or route:

1. Click the hamburger icon and then click \textbf{Dispatch Console}.
2. Select the appropriate resource from the resource tree.
3. Click the gear icon and click \textbf{Activate Route}.
   The \textbf{Activate route} screen appears.
4. Change the time to the actual time that the resource started the queue.
5. Click \textbf{Submit}.

Start an Activity

Typically, resources mark activities as started when they begin to perform the activities. As a dispatcher, you can start an activity on behalf of a resource if necessary.

\textbf{CAUTION:} You must start activities on time in the application. Oracle Field Service Cloud relies on past activity data to project activity durations, travel times, and distances. If activities are not started on time, these projections are not accurate and routing is not optimized.

Prerequisites: You can start an activity only under the following circumstances:

- The route that the activity is assigned to is activated.
- All previous ordered activities are completed, suspended, marked not done, or cancelled.
A dispatcher can adjust the start time of an activity, but cannot set a start time that would begin before a prior activity’s end time. Resources cannot adjust start times. To start an activity:

1. Click the hamburger icon and then click Dispatch Console.
2. In the resource tree, select the resource for which you want to start the activity.
3. Click Time view.
4. Click the activity to view the activity hint.
5. Click Start.
   
   The Start activity screen appears. The start time defaults to the current time.
6. If necessary, change the time.
7. Click Submit.
   
   Once the activity starts, it appears in green status in all views.

Add Time to an Activity

If the resource cannot complete the activity by the estimated end time, then they can add time to the activity through their mobile interface. If necessary, you can add time to the activity on behalf of the resource. You can add time only to an activity that is started.

1. Click the hamburger icon and then click Dispatch Console.
2. Select the resource for which you want to add time to an activity in the Resource Tree.
3. From List or Time tab, locate the activity in Started status, for which you want to add time.
4. Click Adjust time in the activity hint.
   
   5. On the Adjust time screen, enter the new estimated end time.
   6. Click OK.
      
   The application automatically recalculates the activities that follow according to these changes.

Complete an Activity

Typically, resources mark activities as complete when they complete the actual activities. If necessary, you can mark the activity as complete on behalf of the resource.

1. Click the hamburger icon and then click Dispatch Console.
2. In the resource tree, select the resource that you want to complete the activity for.
3. From the Time tab or List tab, select the actions button and then click Complete.
   
   The End activity screen appears. The fields on this dialog vary based on the way the application is configured for your organization.
4. At a minimum, complete the required fields (those with an asterisk *).
5. Click OK.
Suspend an Activity

When resources must return to activities at a later time and they do not want to cancel the activity, they can suspend the activity. If necessary, you can suspend the activity on the resource’s behalf.

Suspending an activity captures the time that a resource has already spent working on it and creates a new, duplicate activity that can be started at any time throughout the day.

Note: You can suspend only started or pending activities.

1. Click the hamburger icon and then click Dispatch Console.
2. In the Resource Tree, select the resource for which you want to suspend the activity.
3. On the Time tab, click the activity that you want to suspend.
4. In the activity hint, click Suspend.

The Suspend activity screen displays:

5. Select the time required to complete the remaining part of the activity in the Duration field. Click OK.

The duration of the pending activity is the duration you have added here and not the one calculated automatically. When you suspend a started activity, a duplicate of the original activity is created in a suspended status. If you suspend a pending activity, it is converted to a not-ordered pending activity. A duplicate of the activity is created only when you start working on it.

6. In the Work Area, the current portion of the activity closes. It displays as a suspended activity (scheduled, but not ordered) in the lower half of the screen.
Assign Not Done Status to an Activity

When resources discover that they cannot complete activities, they mark the activity as \textit{not-done status}. If necessary, you can change the status for them. Unlike suspend, which creates a duplicate copy of the activity to be completed by the technician the same day, the not done status is considered to be a final status, like completed. For example: the customer was not home, or the customer asked to reschedule.

1. Select a resource from the resource tree.
2. From any view, click \textbf{Actions}.
   - The \textit{Close as Not Done} dialog box appears.
3. Select \textbf{Not Done} in the drop-down list.
4. Select a \textbf{Not Done Reason}.
5. Click \textbf{OK}.

Deactivate a Route or Queue

At the end of their shifts, resources must deactivate their routes. You can deactivate the route on behalf of the resource if necessary.

1. Click the hamburger icon and then click \textbf{Dispatch Console}.
2. In the resource tree, select the resource for which you want to deactivate the route.
   - The resource’s route displays.
3. Click \textbf{Deactivate Queue}.
   - The \textit{Deactivate queue} dialog appears.
4. Enter the necessary information and then click \textbf{OK}.

Multi-Day Activities

Multi-day activities are activities that can be carried over to the next day. They are normal activities that are split into segments and managed individually. In other words, \textit{multi-day activity} comprises a set of activities, each representing a single-day task with definite start and end times.

You create a multi-day activity based on the total duration of the activity, number of segments, and the duration for each segment. You must also identify the route or the sequence of the segments in the activity. Multi-day activities can be represented graphically and can be assigned to one or multiple resources. These activities also respond to events that occur as the activity progresses. Technicians receive segments of multi-day activities in their routes and can handle them as single-day activities. Multi-day activities are represented as separate bars on the Time view, can be assigned to buckets or technicians, and support time monitoring and status changes.
Multi-Day Activities and Their Segmentation

A multi-day activity comprises a set of activities, each representing a single-day task with definite start and end times. You can assign each single-day activity to a different resource. A single-day activity is also known as a segment. Further, you can start and complete a segment or the entire activity. Before you create a multi-day activity, you must create a multi-day activity type.

Multi-day activities progress through a lifecycle that is similar to single-day activities. They are created in the pending status, they can then be started, canceled, or deleted. Multi-day activities cannot be suspended. A started multi-day activity can be completed or set to not done. A canceled, completed or not-done activity can be reopened if necessary. However, as opposed to single-day activities, actions with scheduled multi-day activities are performed at the level of their segments and may either affect only the current segment or involve the entire activity. For non-scheduled activities having no segments, there is the Cancel action which always affects the entire non-scheduled activity. If a segment of a multi-day activity is longer than four hours, its bar is shown with a break in the list view. Non-scheduled multi-day activities are displayed in the similar manner.

Note: Single day activities that are longer than four hours are also shown as a bar with a break.

In the following example, the actual length of a segment or activity bar is shorter than the duration of the segment or activity for better visual representation:

Multi-day activity segments can be distinguished from single-day activities on the screen displaying multiple routes. When the mouse hovers over a segment of a multi-day activity, all segments of the same activity are highlighted by diagonal lines, as shown in the following figure:

This helps to find all segments of the same multi-day activity quickly, especially when they are assigned to different resources.

Non-Scheduled Multi-Day Activities

A multi-day activity can be created in or moved to the non-scheduled pool of a bucket or a technician. In this case no segments are created and only the total duration of the multi-day activity is shown in its details.

The following figure shows a non-scheduled multi-day activity:
If a multi-day activity is moved from the scheduled to non-scheduled pool, all segments are removed and the activity is merged into a single entity with the defined duration. Its behavior is the same as that of an activity created in the non-scheduled pool.

**Not-Ordered Multi-Day Activities**

If the **Support for not-ordered activities** feature has been enabled for the multi-day activity type, a multi-day activity can be created not-ordered, that is, without a specific place in the route.

One segment is always created on the first day of the activity, regardless of whether there is time available or not. This segment of minimal duration always remains in case of further adjustments, so that the resource can monitor the not-ordered activity in the current route.

When a not-ordered multi-day activity is created, its segments duration is between the value of the Minimal duration of a single segment parameter and the value of the Maximal total duration of segments created for a particular day parameter. However, the actual duration of a particular segment can be equal to the available time period in the route, if any. The idea behind is that the resource should be able to perform the not-ordered multi-day activity between other activities.

**Other Multi-Day Activity Specifications**

This section includes the specifications for multi-day activities in areas such as property inheritance, activity search, travel time calculation, work zone and work skill support, inventory and required inventory support, capacity management and routing, and so on.

**Property inheritance from a multi-day activity to its segments**

In a pending multi-day activity all fields and custom properties are inherited by the segments from the multi-day activity with the exception of the Duration and Position in route fields which are determined for each segment. If a file property is added to a multi-day activity, the content of such property is not cloned to each segment. Instead, reference to the file property is created for segments. If a new file is uploaded to a started segment, the new File ID will be used only for the segment for which it was created. All other segments will refer to the file uploaded to the entire activity, if any.

**Activity search**

The search is performed both in the activities and in their segments. Therefore, the search results may include the following:

- All existing segments of a scheduled multi-day activity. The activity itself is not returned.
- Non-scheduled multi-day activities.
There is no visual difference between multi-day activities and single-day activities in the list of search results.

Support of Work Zones, Work Skills, and preferred resources

If the Support of work zones, Support of work skills, and Support of preferred resources features are enabled for the multi-day activity type, they will be determined for all activities of such type. The work zone, work skills, and preferred resources are determined for the entire multi-day activity and retrieved for each segment on demand. The same work zone, the set of work skills, and the same preferred resources are applied to all segments.

Travel time calculation

For multi-day activities with the ‘Calculate travel’ option enabled travel time is calculated for all segments of a multi-day activity. The calculation logic and usage for statistical purposes is the same as for single-day activities.

Support of inventory and required inventory

Any inventory added to a multi-day activity is added for the entire activity. Each segment shows the same set of inventory. Any inventory action (install, deinstall, add, and so on) can only be performed on a specific segment. However, these operations will update the inventory list for the entire multi-day activity and, consequently, the inventory list shown for all other segments. Similarly, any required inventory is also assigned to the multi-day activity rather than its segments. The same required inventory is shown for all segments. All required inventory actions are performed for the multi-day activity and update the required inventory list for all segments. Note: Required inventory added to a multi-day activity sets no assignment restrictions. No alerts are shown when the resource’s inventory does not match the required inventory.

Capacity management and routing

Multi-day activities are not included in capacity and quota calculation. No capacity categories are calculated for multi-day activities and neither are they included in the Used values. However, segments of multi-day activities are added to the Other activities value, therefore, the capacity is still consumed. Also, they are included in the start-time statistics. Multi-day activities can be assigned manually or through Immediate Routing plans. The following rules apply for Quota Management:

- Multi-day activities are handled as "internal" activities.
- Multi-day activities cannot be booked with the "get_capacity" function. This function doesn’t calculate capacity categories for such activities.
- Multi-day activities are not included in the Used quota values on the Quota view. Instead, they are added to Other activities.

Activity links

If the Support of links feature has been enabled for the multi-day activity type, it can be linked with other activities. When a link to a multi-day activity is created, it is always made to the entire activity and never to a particular segment. Therefore, not all types of activity links can be used for multi-day activities. Links defining the sequence of activities make no sense with multi-day activities which can be split between different days and resources, when their separate segments are moved, rescheduled, canceled, and placed in the non-scheduled pool. Multi-day activities can be linked to other activities on the basis of assignment constraints defining whether activities must be assigned to the same resource or to different resources. The link template for multi-day activities should be created using the Related link type. If another link type has been selected for a multi-day activity, the error message, ‘Unable to create link of this type for multi-day activity.’ is displayed. If a multi-day activity is linked to another activity, an alert informing of the existing link appears as follows:

- Manage—in the Links tab of the Activity details screen
- Manage—in the Move confirmation dialog
- Mobility—on the Linked activities screen

The link data displayed for a particular segment relates to the entire multi-day activity. Adding or deleting a link for a segment actually adds or deletes a link for the entire activity.
Nearby activities search

The Nearby Activities function does not show either multi-day activities or their segments. Therefore, none of them can be found among the Nearby Activities search results.

Activity history

You can retrieve history from both, a non-scheduled multi-day activity and a segment of a scheduled multi-day activity. The history for a non-scheduled activity contains records for the activity itself. The history for a segment contains records for the current segment and for the entire activity. Some actions relate both, the multi-day activity and one of its segments. In this case, the history contains two records, the one for the entire activity marked with (multi-day activity) in the Action column.

Processing of multi-day activities by Daily Extract

Daily Extract stores multi-day activities and their segments together with activities of other types and extracts them into the Activity Fields file. Multi-day activities can be identified by their type—‘multiday_activity’ for the entire multi-day activity and ‘multiday_activity_segment’ for individual segments of a multi-day activity. If a multi-day is still in progress, each daily extraction contains the completed segments of the activity in the current day routes. As soon as the entire activity is completed, the extracted file contains the data of both, the individual segments and the entire multi-day activity.

Add a Multi-Day Activity

You can segment a complex task to create a multi-day activity. A multi-day activity can be created in a pool of a bucket or a route. You can also mark the activity as scheduled activity or non-scheduled activity once created.

Before you create a multi-day activity, ensure that you have created an activity type for multi-day activities.

1. Click the hamburger icon and then click Dispatch Console.
2. Select a bucket or resource in the resource tree.
3. Click Add Activity.
   
   The Add Activity page appears.

4. Enter the appropriate information in the following fields:
   
   a. Select the order of the activity from the Position in Route drop-down list.
      
      This option is available only when you create a multi-day activity in a route.
   
   b. Enter the customer Name for the customer facing activities.
   
   c. Enter the Duration of the activity.
      
      The duration of a multi-day activity can be set in between 5 minutes and 999 hours.
   
   d. Enter the Work Order number associated with the activity.
   
   e. Select the type of work order from the W/O Type drop-down list.
   
   f. Enter the appropriate SLA start and SLA end dates.
   
   g. Optionally, you can also add the following information in the tabs:

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Info</td>
<td>Indicates the address of the customer.</td>
</tr>
<tr>
<td>Service Info</td>
<td>Indicates the service details of the activity.</td>
</tr>
<tr>
<td>Equipment</td>
<td>Indicates inventory details necessary for the activity.</td>
</tr>
<tr>
<td>Preferred Resources</td>
<td>Indicates the resource requirements and preferences.</td>
</tr>
<tr>
<td>Messages</td>
<td>Shows the log of all the outbound messages pertaining to the activity.</td>
</tr>
<tr>
<td>History</td>
<td>Denotes the history of the activity.</td>
</tr>
</tbody>
</table>
5. Click **OK**.
   
The multi-day activity is created in the **pending status**.

6. To segment a multi-day activity:
   
   Depending on the requirement, you can create a single activity, mass activity, or a repeating activity type of a segment.
   
   a. Click **Actions** in the list view.
   b. Click **Add** activity.
   
   The **Add Activity** window opens.
   
   c. Select the **Activity Type** and enter the **Duration** and **Time to complete** for the segment.
   
   The segment added appears under the **Links** tab.

   In List view of the multi-day activity, a hint pops open for each segment denoting the status, duration, time, and details. You can also start, complete, cancel, reopen and view the directions of a segment.

**Constraints on Creating a Multi-Day Activity**

When a multi-day activity is created, its segments are generated automatically. In generating the segments the functionality takes into account various constraints ensuring efficient tasks distribution and compliance with the customer agreements.

The following constraints are applied when a multi-day activity is created for a particular date (a scheduled activity):

- When a scheduled multi-day activity is assigned to a certain route, its segments are always generated starting from the date of the route. The first segment is always inserted on the day which the activity is scheduled, regardless of whether a corresponding free time interval is available in the route.

- The minimum duration of a single segment is always observed. If the route for a particular day has no time interval for a minimal single segment, no segment is created for that day, except the first segment of a scheduled multi-day activity which is always created on the selected date.

- If for the period of 31 days after the creation of the last assigned segment there is no available interval for assigning the remaining duration of the multi-day activity, the remaining duration is moved to the non-scheduled pool of the same resource making the activity partially scheduled.

- The service window constraint applies only to the first segment of a multi-day activity in the route.

- When creating a multi-day activity, the application should observe the service window constraint not only for the multi-day activity but also for other activities in the route. However, the less time that remains from ETA to the service window end, the higher is the probability of service window overdue. To reduce the overdue probability, the application reserves 20% of the service window scheduling the activity only to the first 80% of the service window interval.

- In addition to the service window reservation, the **Service Window Warning** parameter defined on the **Display** screen also controls the service window compliance.

- If the **SLA start** corresponds to the day on which the multi-day activity is started, this value is used as the minimum ETA for the first created segment of such activity.

- No multi-day activity segments are created on non-working days. If a non-working calendar has been assigned to the resource after the multi-day activity creation, the segment assigned to that day is not moved automatically. An alert is generated indicating that a manual action is required. Such behavior is intended to prevent unnecessary segment changes or removals when the calendar is changed only temporarily.
• On-call calendar is ignored in multi-day activity segment creation.

• When a multi-day activity is non-scheduled, no segments are created. Segments will be created as soon as the activity is scheduled to a particular day.

**Multi-Day Activity Hint**

Similarly to a single-day activity, a multi-day activity produces a hint on a mouse click. Hints appear on a mouse click on the bar of a scheduled activity segment or on the bar of a non-scheduled multi-day activity.

Generally, the multi-day activity hint content is defined in the **Visible hint columns for activities** context layout. At the same time, hints of multi-day activities or their segments always contain the Multi-day status property regardless of the context layout settings. This property has different formats depending on the activity status. The following situations are possible:

• Segments of scheduled pending, complete, and not done activities: The hint contains the activity status, the total duration of the multi-day activity and the total number of segments into which the multi-day activity is split. The **Duration** field shows the duration of the selected segment. The following figure shows the hint dialog for a pending multi-day activity:

![Pending Multi-Day Activity Hint](image1)

• **Canceled** activity: the hint contains the activity status (cancelled). The following figure shows the hint dialog for a canceled multi-day activity:

![Canceled Multi-Day Activity Hint](image2)
• Segments of started activities: The hint contains the activity status, the total duration of the multi-day activity, the activity progress in per cent, the number of segments in a final status in the total number of segments. The **Duration** field shows the duration of the selected segment. The progress value is calculated as the combined duration of all finished segments divided by the total duration of the multi-day activity. In this case the total number of segments does not include canceled and deleted segments. The following figure shows the hint dialog for a multi-day activity segment:

![Multi-day Activity Segment](image)

• Non-scheduled activity: The hint contains the activity status (pending) and the total duration of the multi-day activity with the non-scheduled duration shown separately. As opposed to scheduled activity segments, the **Duration** field shows the duration of the entire multi-day activity. The hint also contains the number of segments created out of the non-scheduled multi-day activity, which for fully non-scheduled activities is always 0. The following figure shows the hint for a non-scheduled multi-day activity:

![Non-scheduled Multi-day Activity](image)
• Partially-scheduled activities and their segments. When a part of a non-scheduled multi-day activity has been moved to the route(s) generating one or more segments and the rest of the multi-day activity remains in the non-scheduled pool, the hints of both the scheduled segments and the non-scheduled part of the multi-day activity contain the activity status and the total duration of the multi-day activity with the 'non-scheduled' duration shown separately. The hint also contains the number of segments created out of the non-scheduled multi-day activity. The Duration field of a scheduled segment shows the duration of such segment, while the Duration field of the non-scheduled part of the activity shows the total activity duration, as shown in the following figure:

Multi-day activity hints appear on Time, List and Map View containing the same information.
Multi-Day Activity Status

A multi-day activity has an own status which in some cases may be different from the status of its segments. The status of a multi-day activity is determined by the activity progress and by the statuses of its segments.

The status of multi-day activities is as follows:

- A multi-day activity is created in the pending status and remains pending if all its segments are in the pending, cancelled or deleted status, or if it has no segments at all (non-scheduled multi-day activities).
- As soon as one of the segments is started, the status is changed to started.
- When one or more segments of a multi-day activity are in the completed or not done status, and there are no other started or pending segments, the activity has the completed status.
- A multi-day activity is in the completed or not done status when one or more segments of a multi-day activity are in the completed or not done status, respectively, and there are no other started or pending segments.
- A multi-day activity changes its status to cancelled when all its segments have been canceled or when the entire activity is canceled together with one of the segments. At the same time no segments must be in the completed or not done status.
- If the canceled activity is in a not-activated route, it can also be deleted. For an activity to be deleted, it must have no canceled segments or segments in activated routes.

Multi-Day Activities in Buckets and Routes

You can assign an activity to the route of the bucket and reassign it to the resource route.

Multi-day activities can be created both in buckets and routes. Be aware of the following points:

- When a scheduled multi-day activity is created in a bucket, it is split into segments and mapped for capacity management processing.
- When the activity is created in a bucket, only one segment is created for each day. The duration of such segment is equal to the value of the Maximal total duration of segments created parameter of the activity.
- If a multi-day activity is created in a bucket that doesn’t have a working calendar, the first segment is created on the day the activity is created. The duration of such segment is equal to the value of the Maximal total duration of segments created for a particular day of the activity. No other segment is created and the rest of the multi-day activity is marked as non-scheduled.
- Segments are not created for the non-working days in the bucket.

Start a Multi-Day Activity

You start a multi-day activity the same way you start a single-day activity. However, the multi-day activity starts when its first pending status segment is started. Further, you can start each segment separately.

1. Click the hamburger icon and then click Dispatch Console.
2. Select a bucket or resource in the resource tree.
3. Select the first pending segment of the multi-day activity.
4. Click Start in the list view.

The Start activity screen opens indicating that the multi-day activity started and the status of the entire activity changes from pending to started.

**Note:** The Multi-day Status field always shows the status of the entire multi-day activity. When the first segment of a multi-day activity is started, the Multi-day status field of all remaining segments also displays Started, regardless of the actual status of the specific segment.
Related Topics

- Complete a Multi-Day Activity
- Cancel a Multi-Day Activity
- Reopen a Multi-Day Activity

Multi-Day Activity Links Tab

The Details screen of a multi-day activity shows all its segments in one place. The Links tab contains a list of all the segments. The list is organized as a table showing the segment date, status, start time and duration. The list also contains the Details and List view links allowing you to quickly switch between the details of activity segments and find them on the List View.

The following image shows the Links tab:

![Links Tab Example](image)

Note: For multi-day activities, the Links tab is always visible, regardless of the Support of links feature setting.

If several segments of a multi-day activity have been assigned to multiple resources, the table has the Resource column showing the name of the resource to which a particular segment is assigned, as shown in the following figure:

![Resource Column Example](image)

If the activity or a part of it is non-scheduled, such activity has Non-scheduled in the Date column, as shown in the following figure:
View and Edit a Multi-Day Activity

You can see the overview of a multi-day activity in the Time, List, and Map views. To view or edit the details of the activity, you must go to the Activity details screen. When you access the activity details from a started segment or a segment in a final status, the Activity details screen shows data of the current segment only. When you update the details of a started segment only the current segment is updated.

1. Click the hamburger icon and then click Dispatch Console.
2. Select a bucket or resource in the resource tree.
   The list of activities is displayed for the selected bucket.
3. Click the bucket or resource for which you want to view the activities.
4. Hover over the multi-day activity for which you want to view the details. All segments of the activity are highlighted by diagonal lines. This highlighting helps you find the segments quickly, especially when they are assigned to different resources.
   The activity hint appears.
5. Click Details.
   The Activity details screen appears.
6. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position in route</td>
<td>The position of the current segment. You can move the segment to a different position by selecting it from the drop-down menu.</td>
</tr>
<tr>
<td>Duration</td>
<td>The duration of the current segment. However, there is always the Time to complete field displaying the duration of the entire multi-day activity.</td>
</tr>
</tbody>
</table>

**Note:** When you update the details of a segment, the details of the entire multi-day activity and other pending segments are updated. If a multi-day activity has any segments in the past, their details are not updated, though.
### Field Services Cloud

#### Using Core Application

**Chapter 2**

**Dispatcher Activities**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time to complete</td>
<td>The remaining duration of a multi-day activity. This field is pre-filled with a value, which is calculated as follows:</td>
</tr>
<tr>
<td></td>
<td>- In <strong>Cancel activity</strong> and <strong>Activity details</strong>: multi-day activity duration – duration of finished segments</td>
</tr>
<tr>
<td></td>
<td>- In <strong>Complete activity</strong> and <strong>Close as Not Done</strong>: multi-day activity duration – duration of finished segments – (current time – start time)</td>
</tr>
<tr>
<td></td>
<td>- In <strong>Reopen multi-day activity</strong>: minimum duration of a single segment (according to the <strong>Activity type</strong> settings)</td>
</tr>
</tbody>
</table>

This field is always present in the details of a multi-day activity. It is added automatically and cannot be configured as part of the context layout. You see this field in the following screens as well:

- Activity details (both for a multi-day activity segment and for an entire activity)
- Cancel activity (in case of only one segment cancellation)
- Complete activity (in case of only one segment completion)
- Close as Not Done (in case of closing only one segment as Not Done)
- Reopen multi-day activity

The minimal allowed value of the **Time to complete** field is determined as the greater of the minimal duration of a single segment and the total duration of the existing started segments. The **Time to complete** value can be changed, if necessary. This is the only way to change the duration of the entire multi-day activity.

7. Click **OK**.

The activity details are updated.

### Complete and Not-Done Activities

You can mark an activity status as **completed** at the end of a task. Activities or segments that are started but cannot be completed due to various reasons can be marked as **not done**.

The activity status is marked complete or not done based on the following constraints:

- You can complete or incomplete the entire activity or a single segment of the activity.
- When the **time to complete** and the last segment complete simultaneously, then the activity is marked **Complete**.
- If the segment completes before the time to complete, the remaining duration is moved to **non-scheduled** pool and the activity is marked as **Started**.
- The **Multi-day activity is finished** check box is selected by default for the last segment of the activity. This check box is disabled for all other segments.
- If you complete an entire activity with a segment, which is not the last segment, all the remaining segments are deleted and the activity is marked complete/not done. Further, all subsequent segments are deleted from the route(s).

**Related Topics**

- Complete a Multi-Day Activity
Complete a Multi-Day Activity

You can mark either a segment or an entire activity as complete. For a segment to be marked as complete, it must be in Started status. You can also mark an activity as complete, after you finish the last segment of the activity. You can also mark the incomplete activity as not done.

1. Click the hamburger icon and then click Dispatch Console.
2. Select a bucket or resource in the resource tree.
3. Open the multi-day activity, which you want to complete in the List view.
4. Select the segment with Start status and click End from the hint.

   The End Segment window appears.

5. To complete the segment, follow these steps:
   a. Enter the time that is remaining to complete the activity, in the Time to complete field.

   Initially, the Time to complete value is calculated according to the following formula: multi-day activity duration – duration of finished segments – (current time – start time). The time to complete can be adjusted simultaneously with completing a segment.

   | Note: | The Time to complete value is automatically calculated only when the form is opened and is not automatically adjusted with the adjustment of the segment completion time (the Ending at field). This prevents unnecessary automatic changes to other segments of a multi-day activity.

6. To complete the entire activity, follow these steps:
   a. Select the Multi-day activity is finished check box.

   The Multi-day activity status drop-down list appears.

   b. Select the final status for the activity from the Multi-day activity status drop-down menu.

   Complete: Denotes that the activity is complete.

   Not Done: Denotes that the activity is incomplete due to various reasons.

   The selected segment along with the entire activity is marked as complete/ not done. The final status of a segment may be different from the final status of the entire multi-day activity. For example, you can close a segment as Not done while the activity will have the Completed status, and vice versa.

7. To set an activity as Not done, follow the steps described in Step 4.

Cancel a Multi-Day Activity

You can cancel a pending multi-day activity or a pending segment within the activity.

1. Click the hamburger icon and then click Dispatch Console.
2. Select a bucket or resource in the resource tree.
3. Select the segment or the activity that you wish to cancel in List view.
4. Click Cancel.

   The Cancel Segment window opens for a segment and Cancel Activity window opens for a non-scheduled activity.

5. If you wish to cancel the entire activity with the current segment, then select the Multi-day activity is finished check box.

   If you select this check box, the Time to complete field is hidden. You can delete an activity that has all its segments in the Pending status in an inactive route, and has no canceled segments. In such case the Cancel Segment window displays the Multi-day activity status field to select the final status of the activity as deleted or canceled.
6. Select the **Multi-day activity status** from the drop-down list and click **OK**.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleted</td>
<td>Denotes that the activity is deleted.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Denotes that the activity is cancelled.</td>
</tr>
</tbody>
</table>

If the multi-day activity has at least one segment in start status, the remaining pending segments can only be canceled individually. You must first change the started segment to a final status. You also cannot cancel the entire activity. You can adjust the time to complete to cancel / delete the activity.

The activity is marked canceled/ deleted.

7. Adjust the **Time to complete** and click **OK**.

The selected segment is cancelled based on the following constraints:

- If you cancel the last segment of an activity and the time to complete expires simultaneously, then the activity is marked complete.
- When the segment is cancelled before the completion of the time to complete, the remaining duration is moved to non-scheduled pool and the activity is marked as canceled.
- The **Multi-day activity is finished** check box is marked by default for the last segment of the activity.
- If you want to cancel the entire activity along with the current segment, which is not the last segment of the activity, all the segments are merged to form a single entity and is marked as canceled.
- If you cancel only the current segment and not select the **Multi-day activity is finished** check box, the **Cancel segment** window shows the **Time to complete** field with the remaining duration of the activity.
- When a multi-day activity has a started segment, all subsequent pending segments can only be canceled individually. In this case there is no option in the **Cancel activity** window to cancel the entire activity. The selected segment can be canceled and, optionally, deleted, by changing the **Time to complete** field, if needed.

Follow the same procedure to cancel a non-scheduled multi-day activity. This activity is created as a single entity without splitting into segments, and can, therefore, be canceled only entirely.

**Reopen a Multi-Day Activity**

You can reopen a canceled segment or a cancelled activity or an activity in the final status. You cannot reopen a single segment in a final status. When you reopen a multi-day activity, the same activity is recreated. The reopened multi-day activity will have the same list of segments in its **Links** tab as well as other attributes.

1. Select the activity that you wish to reopen.
2. Click **Reopen multi-day activity** in the **Activity details** screen. Or, click **Reopen multi-day activity** from the hint. The **Reopen activity** window opens.
3. Enter **Time to complete** to define the duration of the reopened activity.

The field is pre-filled with the value of the minimal duration of a single segment defined for the activity type. This duration can be different from the initial activity duration.

The reopened activity is created with in the same route and allocated to the same resource associated with the initial activity. If the initial activity is not started, the reopened activity is created in the **Pending** status. If the activity is started, the reopened activity is created in the **Started** status.
Moving Multi-Day Activities

You can move and reschedule all the segments or a single segment of an activity to a specific date.

You can drag and drop an activity or a segment on a resource or route to move the activity. The duration on the hint allows you to estimate if the destination time slot is enough to move the activity or segment.

For the scheduled multi-day activities, the hint displays the duration of the particular segment and for the non-scheduled activities the duration of the entire activity is displayed.

You can use this feature to:

- reassign segments to another resource
- reschedule a segment to another day
- reassign multiple segments to another resource
- reschedule multiple segments to another day
- move multi-day activity or segment to/from buckets
- move multi-day activity or segment to the non-scheduled pool
- move multi-day activity from non-scheduled pool and create scheduled segments for a single day only or generate segments for the entire duration of the activity

You can drag-and-drop activities to perform all these actions, and some others, in the Activities View. The Move link is not supported for multi-day activities. When you drag an activity or a segment, a hint prompts you to drop the activity on a resource or route to which you want to move the activity. The hint also contains the activity or segment duration, so that you can estimate if the destination time slot is enough to move the activity or segment. For scheduled multi-day activities, the hint shows the duration of the particular segment, while for non-scheduled activities it shows the duration of the entire activity.

Related Topics

- Move a Multi-Day Activity Between Resources or Dates
- Move a Multi-Day Activity Between Non-Scheduled Pools
- Move a Multi-Day Activity in a Bucket
- Reorder a Multi-Day Activity Segment Within a Route

Move a Multi-Day Activity in a Bucket

If a multi-day activity is created in a bucket, it can be moved to the route of a resource based on the time available in the route. If the destination route has no available time intervals, one segment of the minimal duration set for the activity type is still created.

1. Click the hamburger icon and then click Dispatch Console.
2. Select a bucket or resource in the resource tree.
3. Select the multi-day activity that you want to move.
4. Drag and drop the multi-day activity to another route.
   The Move multi-day window opens.
5. Select one of the following options:
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move all segments starting from date</td>
<td>All the segments of the selected multi-day activity are moved to the selected route</td>
</tr>
<tr>
<td>Create segments only for date</td>
<td>Segments are created only for the current date. The remaining multi-day activity is left in the bucket. A segment with minimal duration is inserted if the destination route does not have available time interval for that day. One or more feasible segments are inserted if the time is available and the segments with higher duration are removed from the bucket. The remaining duration of the multi-day activity is redistributed in the bucket, creating new segments if necessary.</td>
</tr>
</tbody>
</table>

For example, if a seven-hour segment is moved from a bucket to a resource and the resource’s route only has time for one 1-hour segment and one 2-hour segment, the remaining four hours of the activity will be added to the last segment in the bucket or created as a new segment. No multi-day activity segments remain in the bucket for the current date.

**Move a Multi-Day Activity Between Resources or Dates**

When a *scheduled activity* is moved to another resource or rescheduled to another date, all its pending segments are deleted and recreated in the new location. The recreated activity segments can have different destination route, date, and duration from the initial activity. In addition, number of segments may also differ.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.
3. Select the multi-day activity or segment that you wish to move.
4. Drag and drop the multi-day activity to another resource /date.

The **Move multi-day** window opens.

5. Select one of the following move options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move only selected segment</td>
<td>Only the segment dragged is moved to the new destination.</td>
</tr>
<tr>
<td>Move all segments assigned to this resource for date</td>
<td>All the segments that are assigned to the resource on the same date are moved.</td>
</tr>
<tr>
<td>Move all segments starting from date</td>
<td>All the remaining segments of the multi-day activity on and after the selected date are moved.</td>
</tr>
</tbody>
</table>

When only one segment of the multi-day activity is assigned on a selected date, the **move all segments assigned to this resource for date** option is not available. When the selected segment is the last in the multi-day activity and is the only segment assigned on the selected date, only **move only selected segment** is available.

The segments are moved. If the move action violates any of the applied constraints, a warning message appears indicating the violation.

**Move a Multi-Day Activity Between Non-Scheduled Pools**

When you drag-and drop a multi-day activity from a *non-scheduled* pool to the route of a resource, an activity with its segments is generated according to the route constraints. You can also move an activity from a route to the non-scheduled pool.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.
3. Select the activity that you wish to move.
4. Drag and drop the multi-day activity to another route.

   The **Move multi-day** window opens.

5. Select one of the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generate all segments starting from date</td>
<td>Moves the entire activity and creates its segments from the current date. The resulting segments are placed into the resource’s route according to the constraints.</td>
</tr>
<tr>
<td>Create segments only for date</td>
<td>Segments are generated only for the current date according to the constraints and the remaining part of the multi-day activity is left in the non-scheduled pool.</td>
</tr>
</tbody>
</table>

The sequence of segments in a multi-day activity is not important. If one or more segments are moved to different resources, the segments (activities) are performed independently.

The activity is moved.

### Reorder a Multi-Day Activity Segment Within a Route

A segment of a multi-day activity can be moved to a different place in the same *route*.

1. Click the hamburger icon and then click **Dispatch Console**.
2. Select a bucket or resource in the resource tree.
3. Select the activity that you wish to move.
4. Drag and drop the multi-day activity to another route.

   The **Move multi-day** window opens.

5. Select one of the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move only selected segment</td>
<td>The selected segment is moved to a different position in the route.</td>
</tr>
<tr>
<td>Recreate all segments in this route</td>
<td>Segments are reordered and the duration and the number of segments are recalculated in the route.</td>
</tr>
</tbody>
</table>

If you select **Recreate all segments in this route**, the segments are automatically calculated and adjusted as per the constraints.

The segments are reordered in the route.

### Change or Cancel Multiple Segments

When the **Activities** screen is set to the **List** View, you can select the segments of scheduled multi-day activities for group actions together with other activities in the route. In this case only **Change** and **Cancel** actions are available. When you select only multi-day activity segments, the **Move** action is not shown.

1. Open the multi-day activity in the **List** view and select the activities you want to move.

   If you select other activities with multi-day activity segments, the **Move** link is shown, but the move action is applicable only to the other activities. Further, the count of activities denotes the number of other activities.

   The hint appears denoting the number of segments available to change and cancel and the other activities to move.
2. Select the appropriate option:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change</td>
<td>When you apply this option to one or more pending segments, the details of the entire multi-day activity are updated. If you change the segment with start status, the updates are visible only to the selected segment. If you change a pending segment, the entire activity is updated.</td>
</tr>
<tr>
<td>Cancel</td>
<td>You can cancel only the pending segment and not the entire activity. You also cannot update the time to complete the segment when you cancel the segments. When you cancel a group of activities, the route is not recalculated until all activities selected for the operation are cancelled. This reduces the time required for the operation and increases the system performance.</td>
</tr>
</tbody>
</table>

The selected segments are changed / cancelled.

Activity and Segment Duration Adjustment
You can adjust the duration of activities and the individual segments that comprise them. The duration of the complete task is set up while creating a multi-day activity. You must adjust the **Time to complete** value to adjust the activity and segment durations.

When you first create a scheduled multi-day activity, it is automatically split into segments. The duration of each segment is calculated according to the constraints and the actual time available in the route of the resource. You can adjust the activity and segment duration based on these constraints, however, the purpose, procedure and results of such adjustments may be different.

**Related Topics**
- Adjust Activity Duration
- Adjust Segment Duration

Adjust Activity Duration
The duration of a scheduled multi-day activity is the sum of durations of all its segments. You can adjust the time to complete the activity to manage its duration.

1. Select the scheduled activity and open the **Activity Details** page from a route or a bucket.

The **Time to complete** value is the total duration of the multi-day activity minus the duration of the already finished segments.

The **Duration** and **Time to Complete** fields appear.

2. Adjust the **Time to complete** under the following conditions:

<table>
<thead>
<tr>
<th>Option</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel a multi-day activity segment</td>
<td>If only one segment of a multi-day activity is canceled, the total activity duration can be changed simultaneously.</td>
</tr>
<tr>
<td>Complete a multi-day activity segment</td>
<td>If only one segment of a multi-day activity is canceled, the total activity duration can be changed simultaneously.</td>
</tr>
<tr>
<td>Set a multi-day activity segment ‘not done’</td>
<td>If only one segment of a multi-day activity is set not-done, the total activity duration can be changed simultaneously.</td>
</tr>
</tbody>
</table>
Reopen a multi-day activity

<table>
<thead>
<tr>
<th>Option</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reopen a multi-day activity</td>
<td>If a multi-day activity in a final status is reopened, its duration can be changed at the same time.</td>
</tr>
</tbody>
</table>

The activity duration is changed.

**Note:** If you change the **Time to complete** value, the remaining pending segments are recalculated; the number of segments and their duration may be changed.

**Adjust Segment Duration**

Although activity segments are initially generated automatically, you can change their parameters manually. Such manual changes are preserved during further automatic recalculations. Also, you change a segment manually in a route that contains other segments of the same multi-day activity, such other segments will also be protected against automatic recalculations.

1. Select the segment started in an activity and click the **Adjust Time** link.

   The **Duration** and **Time to Complete** fields appear.

2. Adjust the **Time to complete** value under the following conditions:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start a segment</td>
<td>If the route contains pending segments of the same multi-day activity, they are not adjusted automatically with the time adjusted to the started segment. This action causes recalculation of the activity segments in the routes of next days. The routes may be adjusted so that the total duration of the multi-day activity is preserved. If all remaining segments of the multi-day activity are located in today’s route, and the started segment adjustment causes their total duration to exceed the total duration of the activity, you must increase the duration of the activity accordingly.</td>
</tr>
<tr>
<td>Cancel a segment</td>
<td>If one of the segments of a multi-day activity is canceled, no other segment in the same route is affected. The total duration of the multi-day activity (the <strong>Time to complete</strong>) can be changed, though.</td>
</tr>
<tr>
<td>Mark the segment as cancel/not done</td>
<td>You can adjust the duration of a specific canceled /not done segment. The adjusted duration of a segment does not modify other segment duration.</td>
</tr>
<tr>
<td>Reorder segment within a route</td>
<td>You can adjust the duration of the reordered segment. No other activities and/or segments in the same route are affected</td>
</tr>
<tr>
<td>External events</td>
<td>The following external events cause recalculation of all segments of the existing activities of such type:</td>
</tr>
<tr>
<td></td>
<td>- Adding an activity to the route</td>
</tr>
<tr>
<td></td>
<td>- Canceling an activity in the route</td>
</tr>
<tr>
<td></td>
<td>- Starting and completing an activity before the multi-day activity segment in the route</td>
</tr>
<tr>
<td></td>
<td>- Changing the time slot, duration, or other parameters affecting the ETA</td>
</tr>
<tr>
<td></td>
<td>- Calendar changes such as working and non-working hours, shifts, and so on</td>
</tr>
<tr>
<td></td>
<td>The duration is adjusted according to the new settings and, consequently, may change the total number of segments. However, any changes made to the segments manually are preserved even if the activity type parameters change.</td>
</tr>
</tbody>
</table>
to the new settings, and this in turn may change the total number of segments. However, any changes made to the segments manually are preserved even if the activity type parameters change.

Teamwork

Teamwork is a feature that allows a resource or group of resources to assist each other either on a specific job or on an ongoing basis.

There are two roles to be aware of when setting up a teamwork situation:

- team leader – This is the resource who is being assisted.
- assistant – The resource who is assisting.

The team leader and assistant(s) are visible in the resource tree. The assistant is shown with an arrow pointing to the team leader. In the figure below, Billy Holm is assisting Kathleen Disney:

In the assistant’s work order queue, time will be reserved and marked as assisting (the team leader). The arrow points to the person who is in need of assistance.

Teamwork can be assigned in multiple ways:

- Use the Assign to Team link in the Actions menu.
- Use the Assign to team link in the hints box.
- Drag and drop into the resource tree.

Teamwork functions are very similar to regular activities. The team leader does not have to do anything different that they would normally do since it is the job(s) on the team leader’s route in which the resources are assisting. The following rules apply for teamwork:

- Both the team leader and individual resources can start and complete teamwork on their mobile device. If any resources cannot do this, the team leader can do it for them.
- The assistant can open a teamwork activity and see the route of the team leader in Oracle Field Service Mobility Cloud Service on the day of the teamwork.
- The assistant can reschedule a scheduled regular activity assigned to the team leader within the day(s) of teamwork, but can’t reschedule it to other day(s) when there is no teamwork.
- The assistant can’t reschedule a scheduled regular activity assigned to the team leader to a non-scheduled pool.
- If the assistant tries to perform actions that are not permitted with a scheduled regular activity assigned to the team leader, the message, “You are not authorized to move the activity” appears.
Assign Teamwork Using Drag and Drop

You can assign teamwork using multiple ways and drag and drop is one of the ways. Be aware that there are two roles involved in teamwork—Team Leader and Assistant.

The second way to assign Teamwork is to drag and drop one Resource to another.

1. In the Resource Tree, select the Resource who will be the assistant.
2. Drag the Assistant to the Resource who will be the Team Leader.
   When dragging over names in the Resource Tree, hints may appear to indicate whether or not the selected Resource can participate in Teamwork.

3. Once the Team Leader is selected (visible by a green box appearing around the Resource’s name) drop the Assistant onto the Team Leader.
   The Teamwork assignment box appears.

Assign Resources to a Team

To use the Assign Team function using the Actions menu:

1. Select the Resource who will be the assistant from the Resource Tree.
2. Click Assign to Team.
   The Assists to context menu appears and displays the hierarchy of the resource tree up to the specific technician that you can select as assisting. If you search for a resource, the search results display the matching resources, sorted in alphabetical order.
3. Select the pencil icon to display the **Resource Tree**.

4. Choose one.
   - Use desired filters if necessary.
5. **Select your desired resource.**

Descriptions of the fields in the *Assign resource to team* dialog box is listed below:

- **Assists to**: Select the pencil to search for your desired resource. Start typing the name of the resource in the search field that the selected resource will be assisting (the Team Leader). The application will search and bring up resource options as you are typing. Or you can click the name of the resource in the resource tree and it will fill in the *Assists to* field.

- **Position in Route**: Select the position this activity will fall in the route. You can select beginning of route, in between other scheduled activities; end of route, or as a not ordered activity.

- **Duration**: Enter the length of time this teamwork assignment will last by using the drop down menus for hours and minutes. The initial duration is based on the assistant’s calendar for that day, without consideration for what other activities may already be on the route (that is, it’s maximum amount of whole hours for the shift). This time is rounded up to the equivalent of whole hours. The duration can be adjusted as needed.

- **Time Slot**: Time Slot refers to a time window that the teamwork should begin within. If a time slot is configured, the duration begins within that window, unless a prior activity on the route pushes the teamwork to start past the defined window. The default is all day, but you can change to reflect a specific time slot. Click the **Time Slot** check box to select the time slot you want this activity to be performed.

- **Activity type**: Select the teamwork Activity Type from the drop down list.

- **Repeating Activity**: If this is repeating Teamwork, select the box next to **Repeating activity to open repeat options**. You can indicate if this Teamwork should repeat daily or weekly and which days/weeks on which it should repeat. The days and duration of repeating teamwork is based on when the activities were created. Changes made to a team leader’s calendar or shift do not update the assistant’s repeating teamwork activities.
The **Assists to field** populates.

6. Once you have completed all required information, click **OK** or **Close to Cancel**.

Teamwork appears in the Assistant’s work queue, and the **Resource Tree** indicates that the Team Leader is being assisted.

### Resources

Resources are the people who perform the activities and the items that are paired with those people. Examples of resources include technicians, tools, and trucks.

The Working with Resources section describes some of the tasks that you can perform with resources. For the remaining tasks, see the Using Core Manage Cloud Service guide.

### Time Zone Settings

When you configure the application, it is possible to set different time zones for a user and for a resource. These time zones are used in different contexts on different screens. This topic gives an overview of how time zones are displayed throughout Oracle Field Service Cloud.

**Today’s date**

The time zone of the currently logged in user is used when determining the today’s date. For example, if it is 1:00 PM, Jun 10 in a UTC+00:00 time zone and you log in as a user who is in UTC+12:00 time zone, then after logging in you will see that the current date is set to Jun 11. This is because, in the user’s time zone it is already 01:00 AM, Jun 11. Today’s date is used as the initial date on the following screens in Oracle Field Service Core Manage Cloud Service: Activities, Daily, Offline synchronization, Dashboard, and Print route. For example, on the "Activities" screen, it is the date for which the
activities will be shown after you log in to the application. You can change the date on these screens to see the information for another date. Nevertheless, when you click the date field, the calendar widget shows you today’s date in light blue color. The following figure shows the calendar with today’s date highlighted:

![Calendar with today's date highlighted](image)

The same behavior is present in Oracle Field Service Mobility Cloud Service. When a field resource logs in, today’s date is marked with light red color on the date selection panel in the header, as shown in the following figure:

![Date selection panel in the header](image)
When a field manager looks at the **Calendars** screen in Oracle Field Service Mobility Cloud Service, then today's date is marked in blue, as shown in the following figure:

![Calendars screenshot](image)

The same date is used in Oracle Field Service Core Manage Cloud Service when searching for activities "starting today".

**Current date of the resource**

The current date of the resource is always determined in the time zone of the resource. You can activate the route and start an activity only on the current date of the resource time zone.

**Changing past activities**

Every instance has a specific time when all the data that is related to the previous day is frozen and can’t be changed any more. This time is configured on the **Business Rules** screen in the **Overnight work** section, shown in the following figure:

![Overnight work screenshot](image)

For example, you have configured that the working time is 5 hours since midnight in the Eastern time zone. This means that at 5:00 AM in the Eastern time zone all data for the previous day becomes frozen.
**Important:** If you configure an instance to use in several time zones, you must set the time zone on the **Business Rules** screen to the most "western" time zone. If the work is performed several hours after midnight in this most "western" time zone, then you must also specify the number of hours after midnight.

Time view in Oracle Field Service Core Manage Cloud Service

The screen **Activities > Time** can display aggregated information for the hierarchy of resources. The information is presented in the same time zone to look consistent on the time line. The time zone is determined as the time zone of the resource selected in the resource tree on the left of the screen. The current time which is shown as a red vertical line is also in the time zone of the selected resource, shown in the following figure:

Note: The only exceptions are the resource hint, activity hint, and activity label. Information on the resource hint is displayed in the time zone of the resource this hint belongs to. Information on the activity hint and activity label is displayed according to the rules described in the Activity related information section later in the topic.

Manage screen in Oracle Field Service Mobility Cloud Service

The **Manage** screen in Oracle Field Service Mobility Cloud Service shows the information similar to the **Activities > Time** screen. The difference is that there is no resource selected in Oracle Field Service Mobility Cloud Service. The information is shown for the list of resources identified as a group, and the group is configured by a user. Since it is not possible to identify which resource time zone should be used as the primary time zone, the time zone of the currently logged in user is used instead.

Note:
- The only exceptions are the resource hint, activity hint, and activity label. Information on the resource hint is displayed in the time zone of the resource this hint belongs to. Information on the activity hint and activity label is displayed according to the rules described in the Activity related information section later in the topic.
- When a user opens the non-scheduled or non-ordered activities on the right of the screen, the activity identifier shows information according to the rules described in the Activity related information section later in the topic.
Organizations with multiple time zones

If your organization operates in multiple time zones, it is important that you configure both, the field resource and activity time zones correctly. Configuring these time zones is even more important if they are different. A field resource sees all the data in their own time zone, but when the activity (customer) is in a different time zone, both times are shown as appropriate. The activity time zone is used for notifications and can be used in APIs (for example, for sending messages). Typically, the time zone of a physical location is used for notifications, but you may use your preferred time zone, such as your headquarters time zone or any other in which you prefer to get notifications.

Resource related information

Information that is related to a resource and the resource’s route is entered in the resource time zone. It includes:

- Route Status (queue_status) which includes the time when route was activated
- Reactivated (reactivated)
- Resource working hours (calendar)
- Resource on-call hours (oncall_calendar)

Time view shows this information differently in Oracle Field Service Core Manage Cloud Service and Oracle Field Service Mobility Cloud Service. See the earlier sections for more details.

Activity related information

Time related information on an activity is displayed and entered in the time zone of the resource for which the activity is assigned. This information includes:

- Start (ETA)
- End (end_time)
- Start - End (eta_end_time)
- Delivery window (delivery_window)
- Activity Time of Booking (atime_of_booking)
- Activity Time of Assignment (atime_of_assignment)

The only exceptions are:

- Time slot or service window (depending on what is used for the particular activity type)
- SLA window

These properties are either in the resource time zone or in the customer time zone. It depends on the SLA and Service window use customer time zone field set on the activity type. Time view shows this information differently in Oracle Field Service Core Manage Cloud Service and Oracle Field Service Mobility Cloud Service. See the earlier sections for more details.

User related information

All user related information is shown in the time zone of the user. It includes:

- When the user was registered
- When the user was updated
- When the user logged in last time
- When the user changed his password
- Date and time till when the user is blocked

Field Collaboration
Each message in Field Collaboration includes the time when it was sent. This time is shown in the time zone of the currently logged in user.

View Resources

The **Resources** screen gives the entire picture of an organization, including its business units, human beings, tools, and vehicles.

1. Click the hamburger icon and click **Resources**.
   The Resources screen appears, as shown in the following figure:

   ![](image)

2. To view all the resources and the count of each resource in your organization:
   a. Click the drop-down list in the **Organization** section and select your organization.
   b. Click **Change** in the **Org Unit/Bucket** section and select **All**.
      All the resources in all the organization units and buckets are displayed in alphabetical order and the count of each type of resource is shown in the **Resource Type** section.

3. To view the resources in a specific organization unit or bucket:
   a. Click **Change** in the **Org Unit/Bucket** section and select the required organization unit or bucket in the **Organization Units Selection** dialog, as shown in the following figure:
All the resources in the selected organization unit or bucket are displayed in alphabetical order and the count of each type of resource is shown in the **Resource Type** section.

4. To view a specific type of resource:
   a. Click **Change** in the **Org Unit/Bucket** section and select the organization unit or bucket in which you want to see the specific types of resources.
   b. Select the required check box in the **Resource Type** section.

The resources of the selected type are displayed in alphabetical order and the count of active resources is updated in the **Status** section.

### Add an Organization Unit or a Bucket

You can use organization units to sort and organize the other items in the resource tree. You can use buckets to hold the activities that are not assigned to field resources.

Difference between resource, user, and child resource: A resource can be a field resource (a human being), dispatcher, administrator, a vehicle, or a tool. All resources are elements of the resource tree. A user is a field resource or any other user that has access to Oracle Field Service Cloud. A child resource is a resource that is added to a bucket or an organization unit element of the resource tree. In the hierarchy of the resource tree, the bucket or the organization unit appears at a higher level than the child resource. A child resource can be a field resource (a human being), a vehicle, or a tool.

Organization units are typically used to group resources by location. Organization units cannot be route owners and activities cannot be assigned to them. Buckets can have activities, and they are assigned only by Routing Cloud Service. To add an organization unit or a bucket:

1. Click the hamburger icon and then click **Resources**.
2. Click the plus icon.
   The Add Resource screen appears.
3. Complete the following fields:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the name of the organization unit or bucket the way you want it to appear in the resource tree.</td>
</tr>
<tr>
<td>External ID</td>
<td>Enter a unique ID for the organization unit or bucket. These IDs are optional.</td>
</tr>
<tr>
<td>Resource Type</td>
<td>Select Group or Bucket. The fields on the screen change based on the option you select.</td>
</tr>
<tr>
<td>Org Unit/Bucket</td>
<td>Select the organization unit or bucket under which you want to create the organization or bucket.</td>
</tr>
<tr>
<td>Time zone</td>
<td>Your (currently logged in user) time zone is populated, change it if required. This is the time zone in which the organization is located.</td>
</tr>
<tr>
<td>Time format</td>
<td>Your (currently logged in user) time format is populated, change it if required. This is the time format that your resources see and use in the interface. This can be either 12-hour or 24-hour.</td>
</tr>
<tr>
<td>Date format</td>
<td>Your (currently logged in user) date format is populated, change it if required. This is the date format that your resources see and use in the interface. This can be either month-day-year or day-month-year. The date format controls the display of dates in numeric format.</td>
</tr>
<tr>
<td>Credence</td>
<td>Enter information about the resource that you want to provide to a customer.</td>
</tr>
</tbody>
</table>

4. Click Submit.
   The new organization unit or bucket is added to the resource tree, in the selected hierarchy.

Add a Dispatcher, an Administrator, or a Manager

You use the Add Resource screen to add a dispatcher, an administrator, or a manager user.

1. Click the hamburger icon and then click Resources.
2. Click the plus icon.
   The Add Resource screen appears.
3. Complete the following fields:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the resource name the way you want it to appear in the resource tree.</td>
</tr>
<tr>
<td>External ID</td>
<td>Enter the ID number from an external system, such as the employee ID number. These IDs are optional. If you use them, each resource must have a unique ID.</td>
</tr>
<tr>
<td>Resource Type</td>
<td>Select Manager/Dispatcher/Admin. The fields on the screen change based on the option you select.</td>
</tr>
<tr>
<td>Org Unit/Bucket</td>
<td>Click the field and select the organization unit or bucket with which you want to associate the resource. The options available for you are configured by your administrator. If you do not select any organization unit or bucket, the resource is treated as unassigned to any organization.</td>
</tr>
</tbody>
</table>
### Change the Resource Type of a Field Resource

There could be cases where you may have to change a field resource to a dispatcher or manager. When you do this, the resource becomes inactive and a user is created.

1. Click the hamburger icon and then click **Resources**.
2. Type the resource name for which you want to change the Resource Type in the **Search** field. The matching results appear.
3. Click the required resource name. The **Resource Info** screen appears, with all the details of the resource.
4. Click the resource name. The **Edit Resource** screen appears.
5. In the **Resource Type** field, select Manager/Dispatcher/Admin.
6. Click **Submit**. The resource becomes inactive, and a user is created.

### Create a User Without a Resource

Sometimes you may want to create a user that does not perform the duties of a field resource. Use the **Add Resource** screen to add a user.

1. Click the hamburger icon and then click **Resources**.
2. Click the plus icon. The **Add Resource** screen appears.
3. Complete the following fields:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the resource name the way you want it to appear in the resource tree.</td>
</tr>
<tr>
<td>External ID</td>
<td>Enter the ID number from an external system, such as the employee ID number. These IDs are optional. If you use them, each resource must have a unique ID.</td>
</tr>
<tr>
<td>Field name</td>
<td>Action</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Resource Type</td>
<td>Select Manager/Dispatcher/Admin. The fields on the screen change based on the option you select.</td>
</tr>
<tr>
<td>Org Unit/Bucket</td>
<td>Click the field and select the organization unit or bucket with which you want to associate the resource. The options available for you are configured by your administrator. If you do not select any organization unit or bucket, the resource is treated as unassigned to any organization.</td>
</tr>
<tr>
<td>Time zone</td>
<td>Your (currently logged in user) time zone is populated, change it if required. This is the time zone that the resource sees and uses in the interface.</td>
</tr>
<tr>
<td>Time format</td>
<td>Your (currently logged in user) time format is populated, change it if required. This is the time format that the resource sees and uses in the interface. This can be either 12-hour or 24-hour.</td>
</tr>
<tr>
<td>Date format</td>
<td>Your (currently logged in user) date format is populated, change it if required. This is the date format that the resource sees and uses in the interface. This can be either month-day-year or day-month-year. The date format controls the display of dates in numeric format.</td>
</tr>
<tr>
<td>Credence</td>
<td>Enter information about the resource that you want to provide to a customer.</td>
</tr>
</tbody>
</table>

4. Click **Submit**.
   
The user is created.

## Move a Resource

Sometimes, you may have to move a resource from one organization unit or bucket to another. You can move only the resources that are at the organization unit or bucket level. Use the **Edit Resource** screen to implement this change.

1. Click the hamburger icon and then click **Resources**.
2. Type the name of the resource that you want to move, in the **Search** field.
   
The matching results appear.
3. Click the required resource name.
   
The **Resource Info** screen appears, with all the details of the resource.
4. Click the resource name.
   
The **Edit Resource** screen appears.
5. Click the **Org Unit/Bucket** field.
   
The **Org Unit/Bucket** dialog appears.
6. Search for and select the organization unit or bucket to which you want to move the resource.
7. Click **Select**.
8. Click **Submit**.
   
The resource type is moved to the new organization unit or bucket in the resource tree.

## Change the Visible Resources

The Visible Resources field lets you control which resources can the current user view.

1. Click the hamburger icon and then click **Resources**.
2. Type the resource name for which you want to change the visible resources in the **Search** field.
The matching results appear.

3. Click the required resource name.
   The Resource Info screen appears, with all the details of the resource.

4. Click the resource name.
   The Edit Resource screen appears.

5. In the Visible resources field, select an organization, organization unit, or bucket.
   The Visible resources field is available only if you have the visibility set as R/W for your user type on the Resource/User Edit context layout. Further, you can only select from an organization, organization unit, or bucket to which you belong.

6. Click Submit.
   The selected user can see the resources belonging to the selected organization, organization unit, or bucket.

Assign a Schedule to a Resource

The supervisor can update a resource’s calendar and the changes are visible with immediate effect.

However, the supervisor is notified about the resource’s task allotment status at the time of calendar updating. You can access and update the resource’s calendar from the following locations:

- Calendar icon present on the Home page (if configured on the layout)
- Calendar icon present in the hamburger menu (if added on the Main menu context layout)
- From the Resource Info page, using the Resource Calendar option (if added on the Resource/User Info layout)

Assigning a Schedule

You can assign a schedule that exists in the system to a resource.

1. From the Resource Calendar, click on any date of the resource to which you want to assign a schedule.
2. From the Schedule drop down list, select the Schedule you want to assign to a resource.
3. From the Calendar option, select the End Date on which you want to end the new schedule.

   ✍️ Note: If you do not specify any end date, the schedule is considered as Infinity.

4. Click Submit. The new schedule gets applied to the resource.
Non-Working Time Option

There is an option to schedule an activity under the Non-Working Time category. The activity can be scheduled as Non-Working Time if the technician needs a day off because of several reasons like Vacation, Illness, etc. However, you cannot apply Non-Working Time if the technician has activities other than repeating, shift, or mass type activities assigned on a particular day. A warning message appears on the screen, and if you click **Confirm**, then Non-Working Time is applied irrespective of the resource’s schedule.

![BOVE, Leticia, 06/08/18](image)

Favorite Resources

Use the **Favorite** option to get quick access to the most frequently used resources such as Bucket, Field Resource, Organization unit, Tool, or Vehicle.

Both Oracle Field Service Core Manage Cloud Service and **interfaces** support the favorite resources option. The favorite resources that a user marks in Oracle Field Service Core Manage Cloud Service are displayed automatically in the Supervisor view. When a user marks a resource as Favorite, a star appears next to it. In Oracle Field Service Core Manage Cloud Service, favorites are shown as a separate group on top of the resource tree. Favorites are saved for a specific user (not a company level configuration).

The Favorite resources and the Favorites group have the following characteristics:

- You can create the Favorites group only in the Oracle Field Service Core Manage Cloud Service interface.
- You can collapse the root element in the resource tree to view only the Favorites group.
- Favorite resources in the group are displayed regardless of the selected resource filters.
- All warnings shown on the resource icon and resource hint in the resource tree are supported for favorite resources.
- Actions available in the main resource tree such as drag-and-drop and filter are supported for the Favorites group as well.
- When searched for a resource, Favorites and the main resource tree resources are searched.
- When searched by activity, the main resource tree resource is considered, and the Favorites group is avoided.
- Favorites are available on the following screens in the Oracle Field Service Core Manage Cloud Service interface:
  - Activities
  - Daily
  - Dashboard
Mark a Resource as Favorite

Favorites provides quick access to the Bucket, Field Resource, Organization unit, Tool or Vehicle that are important to you.

The Administrator must configure the Resource hint screen context for the required User Type with the Set as favorite and Remove from favorites actions. If you are using the Oracle Field Service Mobility Cloud Service interface, ensure that you have created the Favorites group in the interface.

To mark a resource as Favorite:

1. Click the resource that you want to mark as Favorite in the resource tree.
2. Click Set as favorite in the resource hint.
   A star appears next to the resource in the resource tree. A group by name Favorites is created at the top of the resource tree, and the favorite resource is added to it.
3. To remove a Favorite resource, click the resource and click Remove from favorites in the resource hint.

Tips to Find Available Resources

Activities can be added or moved at anytime and resources may sometimes ask for help in completing an activity. You can locate an available resource through several different ways.

- Let the application propose the available resources. Use the List view to move the activity. The application will evaluate the activity and propose a number of resources that can take the activity.
- Identify resources with idle time. Look in resource tree to find a resource that does not have a full workload.
- Identify open time slots. Look in the time view for white spaces in schedules. White spaces indicate free time.
- Identify nearby resources. In the map view, turn on the Nearby Resources filter to see resources that are working near the location of the activity that needs to be moved.
Related Topics

- Resource and Activity Views
- Move an Activity in the List View

Rules to Determine Resource Location

When a resource is in the field, the application sends the GPS coordinates of the resource to the routing engine, if they are available. This helps Routing determine the location of the resource.

The following rules are used:

If the route is not yet started or no activity is started on the route, the coordinates sent to the routing engine are as follows:

- If the resource’s GPS coordinates are obtained between 0–20 minutes, the GPS coordinates are used.
- If no GPS coordinates are available, or if GPS coordinates are greater than 20 minutes, the resource’s Start Location is used if it is available.
- If no GPS coordinates are available, or if GPS coordinates are greater than 20 minutes, and no Start Location is assigned to the resource then the resource’s location remains undefined.

If the route has a started or a completed activity:

- If the resource’s GPS coordinates are newer than the address of the started or completed activity and the resource is at a distance more than 20 minutes from the address of the started or completed activity (using airline distance and default company airline distance speed), the GPS coordinates are used.
- If no GPS coordinates are available, or if GPS coordinates are older than the address of the started or completed activity, or the resource is at a distance less than 20 minutes from the address of the started or completed activity (using airline distance and default company airline distance speed), the address of the started or completed activity is used.

Resource Calendars

Calendars identify the hours that the resource works. This information is used to route activities and calculate arrival times. If a resource’s schedule changes, you must update their working hours in the Calendar.

You can interact with a resource’s calendar in two ways:

- Daily View: Use the Daily view to see the calendar of a resource, group or bucket for a whole week. This view is also useful for making small changes to individual calendars in the current week.
- Resource Calendars View: Use the resource calendar view to see the details about an individual resource’s schedule. This view is also useful for making changes that involve more than one day or more than one resource.

View a Resource’s Calendar in the Daily View

The Daily view shows the calendar of a resource, group, or bucket for a whole week. This view is useful for making small changes to individual calendars in the current week.

1. Click the hamburger icon and then click Dispatch Console.
2. In the Resource Tree, select the Resource, Group, or Bucket for which you want to see the calendar.
3. Click the calendar and select the date for which you want to view the details.
   The calendar displays.
4. Click the arrow buttons on either side of the date to change the date.
5. Click View to filter the information displayed.
   Similarly, you can click the calendar and select 2 Days, 3 Days, Week, or Month to view the details for the corresponding duration.

Modify a Calendar
Use the Calendar view to make small changes to an individual calendar such as adding shifts and working time.

1. Click the hamburger icon and then click Calendars.
   The Calendar view appears for the group or bucket assigned to you.
2. Select the bucket, group, or resource for which you want to change the calendar.
3. Click a future day for which you want to adjust the details.
   You can change only for future days, you cannot change the calendar for past days. The dialog to adjust the shift details appears, as shown in the following figure:

   ![Calendar View](image)

4. When you are finished modifying the calendar, click Submit.
   Any previous shift that is applied to the resource is replaced with the new shift.

View a Resource’s Calendar in Resource Calendar View
The Resource Calendar view displays the details about an individual resource’s schedule. This view is useful for making changes that involve more than one day or more than one resource.

1. Click the hamburger icon and click Calendar.
   The calendar displays and shows the shift for all the resources in your group or bucket.
2. Use the horizontal scroll bar to view the calendar for past or future days.

Modifying a Calendar in the Resource Calendars View
Use the Resource Calendars View to make big changes to calendars for Groups, Buckets or Resources.

You can perform the following tasks in this view:
- Add a Work Schedule to a Calendar
- Add a Shift to a Calendar
- Add Working Time to a Calendar
Add Non-Working Time to a Calendar

Add a Work Schedule or a Shift

You can assign a workSchedule or a shift to a resource, bucket or group. You can also define the on-call schedule of a resource using the Calendar view.

1. Click the hamburger icon and click Calendars.
   The calendar appears for the resources in your group or bucket.
2. For the resource for which you want to modify the calendar, click the shift for the required date.
   The modify calendar dialog appears for the selected resource and date.
3. To change the work schedule or shift for the resource, update the following fields:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>This list includes work schedules and shifts. Select the work schedule or shift that you want to apply to the resource.</td>
</tr>
<tr>
<td>End date</td>
<td>The date on which the new work schedule or shift ends. If you want to apply it for an indefinite time, click No date specified.</td>
</tr>
</tbody>
</table>

4. To add the details of on-call for the resource, click On-Call and update the following fields:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Call Schedule</td>
<td>The field that specifies that the resource is on-call. Select On-Call. An On-Call shift visually shows what resources are available to be contacted outside of a regular working shift. On-Call calendars are not used in routing optimization or capacity calculations.</td>
</tr>
<tr>
<td>Repeat for</td>
<td>The number of days for which the resource will be on-call, starting from the day that you have selected in the calendar earlier. The dates for which the selected schedule applies appear at the bottom.</td>
</tr>
</tbody>
</table>

5. Click Submit.

Add Working Time to a Calendar

Working time differs from shifts in that it represents start and stop times that may differ from the pre-defined shifts. You might use working time when a resource works a different number of hours than he or she normally does or when the resource works at a different time of the day than the other resources.

1. Click the hamburger icon and click Calendars.
   The calendar appears for the resources in your group or bucket.
2. For the resource for which you want to modify the calendar, click the shift for the required date.
   The modify calendar dialog appears for the selected resource and date.
3. Fill up the following fields:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>Select Custom Working Time from the drop-down list.</td>
</tr>
</tbody>
</table>

   Note: You can create only one on-call shift per day. If you create a second on-call shift, the first one is deleted.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time From</td>
<td>Enter the time when the resource’s work is to begin.</td>
</tr>
</tbody>
</table>
Oracle Field Service Cloud
Using Core Application

Chapter 2
Dispatcher Activities

The following table outlines the actions and their descriptions:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>Enter the time when the resource’s day ends.</td>
</tr>
<tr>
<td>Points</td>
<td>If you are using points to cap activity assignments, you can enter them here. These points work the same way as points associated with a shift.</td>
</tr>
<tr>
<td>Repeat for</td>
<td>Number of days starting from the day selected on the calendar to which the new working time applies. The start and end dates of the new schedule are displayed below the field.</td>
</tr>
</tbody>
</table>

The following figure shows the dialog where you add the custom working time:

4. Click **Submit**.
   The new schedule is displayed on the calendar.

Add Non-Working Time to a Calendar

Use **non-working time** to identify times when a resource, an organization unit, or a bucket is not available for work.

1. Click the hamburger icon and then click **Calendars**.
   The Calendar view appears for the group or bucket assigned to you.
2. Select the bucket, group, or resource for which you want to change the calendar.
3. Click the date for which you want to add the non-working time.
4. To add non-working time for the resource, click **On-Call** and update the following fields:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Call Schedule</td>
<td>The field that specifies that the resource is not working. Select Non-Working Time.</td>
</tr>
<tr>
<td>Reason</td>
<td>The reason for which the resource is not working.</td>
</tr>
<tr>
<td>Repeat for</td>
<td>The number of days for which the resource will not be working, starting from the day that you have selected in the calendar earlier. The dates for which the non-working time applies appear at the bottom.</td>
</tr>
</tbody>
</table>

5. Click **OK**.
   If the non-working time can be applied, the resource is marked as a non-working resource for the selected date range. If the non-working time can’t be applied, a warning message appears. If you click OK, the non-working time
is applied, but a warning message appears on the resource tree for that resource on that day. Non-working time can’t be applied if the technician has anything other than repeating, shift, or mass type of activities assigned on this route. The activities on the resource’s route, other than mass and repeating activities, are rerouted or assigned to the bucket, if the following conditions are met:
  o The routing plan has the Enable reoptimization check box selected.
  o The resource meets the routing plan filter conditions.

Inventory

The term inventory describes the equipment that is used or the items that are consumed by activities. Inventory items can be located at the customer’s home or business or carried in a technician’s truck. Modems, faceplates, wire, cable, and electrical tape are all examples of inventory.

You can perform the following tasks with inventory:

- Add an inventory type
- Install inventory
- Deinstall inventory
- Exchange inventory
- Change inventory properties
- Delete inventory
- Search the Parts Catalog

For more information about how to perform these tasks, see the Using Core Manage Cloud Service guide.

Inventory Types

The term inventory describes equipment that is used – or in the language of inventory – consumed by activities. Inventory items can be located at the customer’s home or business or carried in a technician’s truck. Modems, faceplates, wire, cable and electrical tape are all examples of inventory.

Inventory includes both serialized and non-serialized items. Serialized inventory consists of individual pieces with serial numbers that identify both the type of equipment and the manufacturer/distributor.

Non-serialized inventory, such as faceplates, wire and electrical type do not have serial numbers. This type of inventory is generic. One manufacturer’s supply can be exchanged for another based on a model number.

Non-serialized inventory is often accounted for in bulk by units of measure, such as feet, pounds, dozen, etc. These items are usually carried in the technician’s truck, although the amounts required for individual activities are recorded along with serialized inventory on the Activities Detail screen and on the Inventories List in the technician’s mobility device.

The following figure shows the Add inventory type screen:
Add an Inventory Type

You can create `serializedInventory` and `nonSerializedInventory` types.

1. Click **Configuration**.
2. Select **Inventory Types** from the **Resources, Activities and Inventories** section of the menu.
3. Select **Add New**.
   The application displays the **Add inventory type** window.
4. Complete the fields.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Label</strong></td>
<td>Enter a unique identifier for this inventory type.</td>
</tr>
<tr>
<td><strong>Active</strong></td>
<td>Check this box to make the inventory type available in drop-down menus.</td>
</tr>
<tr>
<td><strong>Non Serialized</strong></td>
<td>Check this box if the inventory type is non-serialized.</td>
</tr>
<tr>
<td><strong>Supports required inventory</strong></td>
<td>Check this box to make the inventory type required for selected activities.</td>
</tr>
<tr>
<td><strong>Model Property</strong></td>
<td>If desired, select additional characteristics for this inventory type from the drop-down menu.</td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>Enter a name for this inventory type in each appropriate language field.</td>
</tr>
<tr>
<td><strong>Unit of measurement</strong></td>
<td>If this inventory type is non-serialized, enter a unit of measure. Use a language and a unit of measure appropriate for the country in which this inventory type will be used.</td>
</tr>
</tbody>
</table>
Note: In Oracle Field Service Mobility Cloud Service, users can upload images using the File inventory capture image property. This capability is not available in Oracle Field Service Core Manage Cloud Service, as it is read-only. If the property is defined in Oracle Field Service Mobility Cloud Service, Oracle Field Service Core Manage Cloud Service users can see the image. If the property is not defined in Oracle Field Service Mobility Cloud Service, the field is not displayed in Oracle Field Service Core Manage Cloud Service.

5. Click Save.

Required Inventory

You can list both, serialized and non-serialized inventory as Required for a particular activity on the Activity Details screen in Manage and on the Inventories List in Mobility.

The following figure shows the Required Inventory tab on the Activity details screen:

The application monitors the required inventory that resources carry in their trucks against the quantities required for the day’s activities and warns them if they have run out of an item needed to complete their route.

The following figure shows the warning that a required inventory is missing with a resource:

Parts Catalog

Mobile personnel use the Parts Catalog to remotely access and search their company's spare parts inventory when working on maintenance and repair jobs.

While technicians assigned to installation jobs usually know fairly well which inventory they are going to install and load on their trucks accordingly, they can determine the parts necessary for replacement only when at the customer’s site after tests and diagnostics. The Parts Catalog enables the technician to look up the spare part required for replacement, discuss the replacement terms (price, period, etc.) with the customer, place an order for the spare part, find an alternative if the customer does not accept the initial offer, and issue an invoice.
The Parts Catalog updates automatically every 30 minutes after the application is launched, and supports both online and offline operation.

**Restrictions and Permissions for Parts Catalog**

A resource must have the permission to use the Parts Catalog.

The permission enables or disables access to the Parts Catalog functionality in the Manage and Mobility applications. Select the **Parts Catalog** check box in the **General** tab of the **User Types** screen for the required user type.

With permission to use the Parts Catalog, the resource can access only catalogs in the language that was set for that resource in the Manage or Mobility applications.

**Search the Parts Catalog**

Parts Catalog is one of the search categories in the **Search preferences** window.

The search key that you enter must contain a minimum of 3 symbols. Leading and trailing spaces are not included in the search key. The key is then matched against all searchable text fields defined in the Parts Catalog.

Search results are organized in a list containing the Parts Catalog item models and other previously defined properties.
The list header shows the total number of matches found and the number of entries currently displayed. If the results list is longer than the window length, the window contains the **Show more results link** that will display 10 more search results. Scroll the search results using the vertical scroll bar. Click any search result item to display the details of that item.

### Inventory Transactions

Manage users have the ability to perform inventory transactions on behalf of a technician, if the user type permissions are enabled.

Inventory actions are performed on the **Inventory** tab under activity details.

> **Note:** Some inventory actions (that is, install, deinstall, exchange) only appear when the activity is in a Started status.

![Image](image.png)

Common inventory actions are listed in this section. The actual configuration may differ based on the way the application is implemented.
Install Inventory

The install inventory action provides the ability to track equipment or inventory that is moved from the technician inventory pool to the customer inventory pool. Typically, technicians install new equipment as part of the activity completion process and the Install action tracks the inventory consumed during the activity.

1. Click the Install link for the equipment in the technician pool.
   The Install inventory dialog appears, as shown in the following figure:

   ![Install inventory dialog]

   - **Inventory Type**: HDMI Cable 6ft
   - **Quantity**: 2

   2. Click OK.

3. Optionally, click Deinstall.
   This allows the ability to undo an install if, for example, a device was installed in error.

Deinstall Inventory

Use the Deinstall action to track equipment or inventory removed from the customer pool. For example, if a technician removes an existing cable box at the customer premise because the service is cancelled, the Deinstall action tracks the removal of the equipment.

1. Click the Deinstall link for the equipment in the customer pool.
   The Deinstall inventory dialog appears, as shown in the following figure:

   ![Deinstall inventory dialog]

   - **Inventory Type**: HDMI Cable 6ft
   - **Quantity**: 2

   2. Click OK.
   Equipment now shows as Deinstalled, as shown in the following figure:
Exchange Inventory

The exchange action allows a technician to replace equipment on the customer’s premises with a piece of equipment from the technician inventory pool.

A common example of an inventory exchange is a DVR set top box is being upgraded to a new model. The tech initiates an exchange action, which removes the customer premise equipment from the customer pool and installs the upgraded box from his technician inventory pool.

1. Click on the Exchange action link.

A pop-up appears, allowing user to select another serialized equipment to exchange it with from the technician inventory pool, as shown in the following figure:

2. Click OK.

Once exchanged, the original equipment in customer pool shows as Deinstalled and the newly swapped device is now shown as installed, as shown in the following figure.
Change Inventory Properties

You can change the inventory properties on an existing customer pool inventory item.

1. Open the Activity details screen for the activity that has the inventory to be modified.
2. Navigate to the Inventory tab and click the Edit link.
   
   The Edit inventory dialog appears:

   ![Edit inventory dialog](image)

   3. Modify the appropriate properties.
   4. Click OK to save changes.

Delete Inventory

Use the Delete action to delete customer pool inventory line items.

**Note:** Inventory items can only be deleted when the activity is in Pending status. When the activity is started, the delete option is not available.

1. Click the Delete link in the inventory grid, as shown in the following figure:

   ![Delete link](image)

   A confirmation message appears.
2. Select **OK**.
   The inventory item is removed from the customer pool.

**Send a Hit**

Some customers configure a **Send Hit** request option to allow for the provisioning of equipment and services (that is, initialize device or refresh services). It allows the technician to send a message, for example, to the external system and pass certain information to allow for the provisioning of that device. Send hit is usually configured as a **send request** or a **manual message** in Oracle Field Service Cloud.

1. Click **Send Hit**.

2. Select the **Hit Type**.
3. Click **Send**.
   The manual message will be triggered and sent as appropriate.

**Dashboard Charts and Reports**

This section discusses the overview of dashboard charts and reports in the Oracle Field Service Cloud Mobile app

You can perform the following on dashboards and reports in Mobility:

- Configure dashboards in the Oracle Field Service Cloud Mobile app. The Main menu Dashboards in the mobile app serves as the single location to access Oracle Field Service Cloud reports, Oracle Field Service Cloud dashboards, and other application dashboards embedded in Oracle Field Service Cloud.
- Add Dashboard pages. You can now customize dashboard pages by arranging the available reports and dashboard in multiple tabs based on your preferences.
- Configure predefined dashboards. Predefined dashboards are ready to use dashboards for a user configured by another user. You can now configure predefined dashboards for a specific user type so that all the users in that user type can view this dashboard pages by default in dashboards.
- Configure available reports for a user type: You can now configure available reports or dashboards for a user type. Based on the configuration users in that user type will be able to see reports and dashboards in their available reports.

**Dashboard Charts**

Dashboard charts are graphical representation of a report. A user can configure a dashboard tab and drag the required chart icon from the Available reports menu and drop it inside a dashboard tab then the chart will display the details of the report accordingly.
Users will be able to remove a chart from a dashboard page using the X button in the upper right hand corner of the report.

In case of predefined dashboards charts, these settings are configured at the time of creation and users who view these predefined dashboards cannot modify these settings.

Standard Reports

Standard reports are represented as a tile in a dashboard tab as shown below. User can configure a dashboard tab and drag the report icon from the Available reports menu and drop it inside a dashboard tab. Reports will be represented with standard report icon and name in Available reports menu.

The report will be displayed with a description of that report in the dashboard tab along with a standard icon as follows:

This figure shows the standard report in Mobility.

While configuring a dashboard tab, user can add or remove the report tile from a tab. The Close button will be available while configuring a dashboard. Clicking this button will remove the report from dashboard tab. If the Available reports menu is hidden then the user cannot remove or add reports to the dashboard tab.

Note that the following functionality is not available in the Core Application Dashboards:

- Reports export option
- Print the route option
- Schedule report option
- Report Resource-User association
Configure Predefined Reports

Predefined dashboards are dashboards created by a user for a specific user type - all the users in that user type will be able to see this dashboard tab by default. User types control the access to configure predefined dashboards in the core application. The user (preferably, Administrator with configuration permission) can grant permissions to configure predefined dashboards for a user type.

To configure predefined dashboards in the Oracle Field Service Cloud core application:

1. Make sure that the user has permission to access dashboards from configuration page.
2. Navigate to the Dashboards page from the Configuration menu.
3. If the Available Reports pane does not appear, click the properties icon and select Configure current dashboard from the drop-down menu.
4. When you open the Dashboards page for the first time, dashboards will not be configured.
   This figure displays the default Dashboards page.

5. You can either click the New Dashboard button or select the menu item to add a predefined dashboard to create a new predefined dashboard.
6. You can select the user type from the page header and add relevant reports or dashboard charts to the dashboard to create a predefined dashboard for that user type.
7. Users in that user type will be able to view the predefined dashboard now.
   This figure displays the Dashboards page with predefined dashboard.
Only those users that have permission to create predefined dashboard will be able to configure, rearrange, rename or delete predefined dashboards.

With predefined dashboards configured for that user type, users can view the dashboard. To view the parameters configured for a dashboard chart, you can click the options icon.

Options configured while creating the predefined dashboard will remain the same for all the users in that user type.

## Edit a Dashboard

You can select and edit a dashboard directly from the Dashboards page.

To edit a dashboard tab:

1. Navigate to the Dashboard tab.

   ![DIAGRAM: Figure showing the Edit a Dashboard process.]

   **Note:** You cannot edit a dashboard tab — add or remove dashboard charts or reports if the Available reports pane is hidden.

2. In the Dashboards page, click the properties icon and select **Configure Current Dashboard**.

   The Available Reports pane appears.

   The figure shows the Dashboards page with Available reports pane after creating a tab:
3. To add a new dashboard chart or report, drag-and-drop the chart or report from the Available reports pane to the dashboard tab layout. The selected chart or report appears in the dashboard tab.

4. To remove a dashboard chart or report, drag-and-drop the chart or report from the dashboard tab layout.

Delete Current Dashboard

You can delete dashboards or reports on the Dashboard.

**Note:** Apply caution when deleting dashboards; once they are deleted, dashboards cannot be retrieved from Oracle Field Service Cloud.

To delete a dashboard tab:

1. Navigate to the Dashboards page.
2. Select the dashboard tab.
3. Click the properties icon and select Delete current dashboard from the drop-down menu. The Delete Dashboard dialog appears.
4. Click OK to confirm deletion. The deleted dashboard tab will not be available in the Dashboards page.
Rename a Dashboard

You may rename a dashboard to any name you wish to use.

To rename a dashboard:

1. Navigate to the Dashboards page.
2. Click the Properties icon and select Rename Dashboard from the drop-down menu.
3. In the Rename Dashboard dialog, edit the Name field to the dashboard name you wish to use.
4. Click OK

The Dashboards page refreshes to display the modified dashboard tab name.

Filter Resource-Specific Data for Dashboards

You can view date and resource as a generic filter for all the charts or reports configured in a dashboard page. You can set filters for all the dashboard charts or reports configured. Data would be displayed based on the filter selection.

Resource filter can be used for displaying the data of dashboard charts at buckets (or organizations) or individual resource level.

To filter resource-specific data in dashboards:

1. Navigate to the Dashboards page.
2. In the Left pane, select the resource to filter.
   - The Dashboards page refreshes to show the data relevant to the selected resource.
   - This figure shows the Dashboards page showing resource-specific data.
Filter Resource-Specific Data for a Selected Report

You can filter resource-specific data for a selected report.

To filter resource-specific data for a particular report:
1. Open the dashboard tab in the Dashboards page.
2. In the Left pane, select the resource to filter.
3. In the Left pane, select the report.

The selected report opens in the detail view to show the data relevant to the selected resource.

Drag and Drop Reports and Charts in Mobile Devices

You can drag and drop a selected report or chart in a Dashboard tab page anytime, provided the Available Reports pane appears on the Dashboards page.

To reorder dashboard charts and reports in a dashboard tab:
1. Open the tab on the Dashboards page.
2. Ensure that the Available Reports pane is open. If not, click the properties icon and select Configure Current Dashboard to open it.
3. Select the dashboard item (chart or report). Drag and drop it to the new location.

You may need to press the icon for some time. You will be able to drag-and drop the icon to the tab page. The selected dashboard chart or report appears on the dashboard tab.
Embed Dashboards in Mobility

You can embed dashboards in Mobility. The Dashboards menu in the mobile application serves as the single location to access Oracle Field Service Cloud reports, dashboards, and other application dashboards embedded in Oracle Field Service Cloud.

You can select the user type from the page header and add relevant reports or dashboard charts to the dashboard to create a predefined dashboard for that user type. Or, you can use the following procedure to embed a predefined dashboard as a dashboard tab.

To embed dashboards in Mobility:

1. Navigate to the Dashboards page from the Configuration menu.
2. In the Dashboards page, click the Properties icon and select **Add Dashboard**.
3. In the Add Dashboard dialog, select **Embed Dashboard** option.
4. In the **Name** field, enter the dashboard tab name to add.
5. In the **URL** field, provide the URL related to Oracle Analytical Cloud, Oracle Business Intelligent Cloud Services, or Oracle Integrated Cloud Services to the host server.

   The embedded reports are presented as a new dashboard tab on the Dashboards page.

   ✏️ **Note:** You cannot configure embedded dashboards.

Set Permissions for a List of Reports

You can set the Available reports configuration option to enable reports.

To set the necessary permissions for a list of reports:

1. Navigate to the Dashboards page.
2. Click the properties icon and select **Configure current dashboard** from the drop-down menu.
   
   The Available reports pane appears as follows

   This figure shows the default view of Available reports pane before setting permissions.
3. Select the progress icon placed next to each report under the Available reports pane to enable it.
This figure shows the Available Reports pane after setting permissions for the user type.

The selected reports or dashboard charts will be added to the available reports list of that user type.
3 Field Resource Activities

Start Your Day

Before You Start Your Day

The tasks you perform at the beginning of the day are important to the workday ahead. These tasks include logging in to Oracle Field Service Mobility Cloud Service, viewing your activities, and activating your route.

Related Topics

- Create and Use a PIN
- View Activities
- Log In
- Activate Your Route

Log In

You will use Oracle Field Service Mobility Cloud Service to communicate with dispatch and management throughout the course of your day using a device such as a tablet, smart phone, or laptop. Simply browse to the URL provided by your system administrator.

Logging in requires a login name and password. Your system administrator assigns login names and passwords. Any web-enabled mobile device can access Oracle Field Service Mobility Cloud Service.

To log into Oracle Field Service Mobility Cloud Service:

1. In your mobile web browser, enter one of the following URLs:
   - https://login.etadirect.com/m
   - https://login.etadirect.com/m/company_name, where company_name is the name of the mobile environment provided by your system administrator

   *Note:* Depending on the defined login policy, the URL may need to be appended with the login policy. For example, for openidconnect.

2. (Optional, depending on the URL you entered.) Type your company name in the **Company** field.
3. Type your user name in the **Login** field.
4. Type your password in the **Password** field.
5. Click **Login**.

After logging in, you see your Oracle Field Service Mobility Cloud Service home screen.
Note: You will be blocked from logging in to Oracle Field Service Mobility Cloud Service once you reach the maximum number unsuccessful log in attempts. If you have forgotten your password, ask your system administrator to reset it.

Create and Use a PIN

In addition to logging in to Oracle Field Service Mobility Cloud Service with a password, you also can use a personal identification number (PIN) to access the application.

When you log in to Oracle Field Service Mobility Cloud Service for the first time, you will be prompted to create a PIN.

In some situations, you will be asked to reenter/restore your PIN.

- After too many unsuccessful login attempts (if you have forgotten your password)
- When you log in again and the screen you were on when you logged out has been saved to the cache

You also can reset your PIN from the Restore screen. Enter your PIN and click Reset PIN. The system will log you out and prompt you to log in again, using your password. You will then be redirected to the Set PIN screen to create a new PIN.

When certain authentication methods have been implemented, you will have the option to change your PIN instead of your password on the User options screen.
Click **Change Pin** to access the **Change PIN** screen.

**Activate Your Route**

You must activate your route at the beginning of every workday. You cannot start an activity until your route has been activated. This is a signal to the dispatcher and to your supervisors that you are ready to work and available to take jobs.

1. Log in to Oracle Field Service Cloud.
   A list of your activities for the day displays.

2. Click **Activate Route**.
3. Click **Yes** on the confirmation screen.

   **Note:** After the route has been activated for the day, the **Activate Route** option no longer displays on the menu.

**Activities**

**Before You Work with Route Activities**

Most of the work you do in the Oracle Field Service Mobility Cloud Service application will involve activities.

You can do any of the following with activities on your route:

- View
- View and add activity details
• Start and complete
• Add time to an activity
• Assign status
• Reschedule
• Suspend
• Mark an activity as Not Done

You can use the Nearby Activities screen to view unrouted activities, either in a list or on a map. Depending on your user type, you might also be able to move the unrouted activities to your route.

**Related Topics**
• Find Nearby Activities

**Working with Non-Travel Activities**

When an activity does not require travel (Calculate travel check box is cleared for the Activity type), the idle time before that activity is considered as travel to the next activity requiring travel in the route.

The travel between activities can be split into two (or more) pieces by inserting non-travel activities in between. As a result, in Time View, non-travel activities are placed over the travel time for activities that require travel. Non-travel activity may have a different location when compared to the previous travel-required activity (or provider start location), if a non-travel activity is placed over a travel-required activity.

To understand the concept better, consider the following sequence of activities:

• First activity: For example, installation requires travelling, ends at 10:00
• Second activity: For example, phone call doesn’t require travelling starts at 17:00 and ends at 17:10
• Third activity: For example, upgrade requires travelling; service window starts at 17:30 and ends at 18:00

Assume that the travel time between First activity and Third activity is 3 hours. The time line would be:

<table>
<thead>
<tr>
<th>Time</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00</td>
<td>First activity is finished</td>
</tr>
<tr>
<td>10:00 to 14:20</td>
<td>Idle time</td>
</tr>
<tr>
<td>14:20 to 17:00</td>
<td>Travel toward third activity</td>
</tr>
<tr>
<td>17:00 to 17:10</td>
<td>Second activity (phone call)</td>
</tr>
<tr>
<td>17:10 to 17:30</td>
<td>Continue travel toward third activity</td>
</tr>
<tr>
<td>17:30</td>
<td>Third activity started without any overdue and as early as the service window allows</td>
</tr>
</tbody>
</table>

**Note:** When you place a non-travel activity manually on a time interval that is occupied by the travel bar of a non-movable (for example, due to service window) travel-required activity, it can happen that the travel bar is partially placed before the actual time. In this case, we recommend that you place the non-travel activity to another place in the route.
Get Driving Directions in Navigate

You can use the Navigate option to get the driving directions for a selected activity.

The Navigate option present in the Activity Details page enables you to use the navigation apps on your mobile device like Google Maps, etc. that are configured by your administrator.

\[\text{Note:}\] The Navigate option will be visible in the Activity Details page only if it is configured in Action Management section.

Get Driving Directions for an Activity

You can get driving directions for a selected activity.

Using Navigate to get driving directions to the selected activity:

1. Login to Mobility from your mobile device.
2. Select one activity from the list and click Navigate. The Navigation app opens the selected activity location.

View Activities

The activities listed on your home screen are grouped by status. Started activities are displayed at the top of the screen, Pending activities in the middle, and closed activities (those that have been Completed) at the bottom.

Pending activities appear in chronological order. Tap the up and down arrows to expand or collapse the sections.

You can view activities scheduled for another day by tapping the date under your name, dragging the calendar to the left or right, and then tapping the desired day.

If you scroll to view any future date and you want to return to the current date, use the left directional arrow present in the date column.
Similarly, if you scroll to any earlier date and you want to return to the current date, use the right directional arrow.

If you are missing any of the inventory required to complete an activity on your route, the system notifies you immediately, in red **Missing required inventory** text. This notice prevents you from showing up empty handed at a customer site. Open the Activity details screen and arrange to pick the inventory up before you travel to the customer location.

**Related Topics**
- View Activity Details

### Start an Activity

When you arrive at an activity, you must start that activity in Oracle Field Service Cloud. Oracle Field Service Cloud uses this data to project activity durations, travel time, and distance.

Always start activities as soon as you arrive at the customer’s location, even before you get out of your vehicle. If you forget to start an activity on time, contact dispatch so that they can start the activity and enter the correct start time for you.

> **Note:** You must always start scheduled activities in order. In other words, you can only start the next activity in the list. Unordered activities are different. They can be started at any time.

1. Click the first pending activity in the list on your home screen.
   The Activity details screen displays.

2. Click **Start**.
   A confirmation screen displays.
3. Select the number of job hazards from the drop-down list and click **Submit**.

The activity status changes to **started**.

> **Note:** After an activity is started, the activity will have the options to adjust time, or change activity status. Menu options are driven by previous activity actions.

### Work-Progress Countdown Indicator

The work-progress countdown indicator appears on your screen after you start an activity, and displays the time remaining until you complete that activity.

Where the indicator appears on your screen depends on the mobile device you are using. If your screen width is 540 pixels or more, the indicator displays as a bar across the top. On narrower screens, the indicator displays on the right side of the title bar.

As the time remaining decreases, the color of the indicator changes from green, to yellow, and then to red. You will receive an expiration reminder when the countdown reaches 5 minutes. When the timer runs down to 0 hours and 0 minutes, the time is replaced with two dashes (--) for hours and minutes and the timer remains red.

> **Note:** If duration of an activity is set to 5 minutes, the countdown indicator will be red immediately.

You can adjust the time to indicate when you plan to leave the activity site by clicking **Adjust** and selecting the additional time you need to complete the activity. Adjusting the time updates the information that displays in the indicator.

Since the indicator displays on many Oracle Field Service Mobility Cloud Service screens, it still will be visible should you need to navigate away from the **Activity details** screen.

### View Activity Details

When you want to know more about an **activity**, you can view the activity details.

The **Activity details** screen includes information like customer name, account number, work order type, and primary phone number. Depending on your configuration, this screen also includes links to further details about customer contact information and the ability to create a Service Request Order.
Note: This screen is often configured to closely fit the needs of the business. As a result, your view might differ from the one in this guide.

To open the Activity details screen, click on an activity on your home screen.

Notifications Panel

The Notifications panel notifies you about route changes or activities that are no longer on your route.

A notification can save you time by stopping you from driving to a canceled activity. All notifications become available as soon as you activate your route, and a bell icon appears on your Activity details screen.

There are three types of notification messages:

- Activity has been added
- Activity has been deleted
- Activity address has been updated

When an activity is added or removed from your route or when the address of an activity on your route changes, a number indicating how many notification messages you have displays on the bell icon.

Clicking the icon opens the Notifications panel.

New information appears in bold white text. Once read and closed, the information will appear in bold gray text if you access the message again.

When you refresh your browser, messages already read will not display on the screen. If you are offline for a period of time, all notifications accumulated during that time will display when you log in again.

Separate address-change notifications contain the updated information (in bold white text), as well as the old (in bold gray text).
You will receive this type of notification when any of the following information changes:

- Address
- City
- State
- ZIP/Postal code

If an address-change notification is longer than two lines, clicking the ellipsis (…) displays the full text of the message.

View Additional Information about an Activity

You can view additional information about an activity, such as job number, map grid, node ID, and services list.

1. Select an activity from your home screen.
   The Activity details screen displays.

2. Scroll to the bottom of the Activity details screen and click Additional Info.
   Additional information about this activity displays:

3. Click Details to return to the Activity details screen.

   Note: Now, we have the “Pull to Refresh” available which refreshes the content available to the field resource.

View an Activity’s History

You can see the same information about the history of an activity as the dispatcher/supervisor sees in Oracle Field Service Core Manage Cloud Service.

An activity’s history displays when you click History on the Activity details screen.

The following figure shows activity history as viewed from the Oracle Field Service Core Manage Cloud Service desktop version. The tabbed options at the top of the screen vary by configuration. You may not see all these tabs on your screen.

When viewing activity history from a mobile device, the screen looks something like this:
Add an Internal Activity

For Oracle Field Service Cloud to provide accurate estimates, you must account for all of your time while working. If your user type supports it, you can add activities to your route for work you do that is not customer facing. You might add an activity for a company meeting, a lunch break, vehicle maintenance, or a stop for gas.

**Note:** If you do not have permission to add an internal activity, you can contact dispatch or your supervisor to add an internal activity on your behalf.

1. On the main screen, click **Add Activity**.
The **Add Activity** screen displays.
2. Type the information about the activity in the fields, and then click **Submit**.

Add Time to an Activity

If an activity cannot be completed within the estimated duration, click **Adjust** to add additional time. This action automatically recalculates the estimated start times for the activities later in the route.
Tip: After you start your activity, perform a sight survey to determine if more time might be needed. If it is, click Adjust to add the time.

1. Select the activity on your home screen that you want to add time to.
   The Activity details screen displays.

2. Click Adjust.
3. Select the number of additional minutes the activity requires from the drop-down list, and then click Submit.

Suspend an Activity

You can suspend an activity and return to it at a later time in the route.

The Suspend feature in Oracle Field Service Cloud allows you to suspend both started and pending activities. The started activity is always ordered; the pending activity should be ordered.

When suspended, a started activity has the following characteristics:

- You can work on it later during the day
- A duplicate of the original activity is created in a suspended status
- The duplicate is created for tracking purposes

When suspended, a pending activity converts to a not-ordered pending activity. A duplicate of the activity is created only when you start working on it.

1. Open the Activity details screen for that activity.
2. Click Suspend.
   The Suspend activity screen displays.
3. Select the reason for suspending the activity from the drop-down list, and enter any notes you think might be helpful.
4. Select the time required to complete the remaining part of the activity in the Duration field.
   The duration of the pending activity is the duration you have added here and not the one calculated automatically.
5. Click Submit.

Duration for Suspended, Reopened, and Pre-Work Activities

You can set the duration for suspended, reopened, and pre-work activities manually. This helps while estimating the remaining duration—it shows the additional work that is needed to complete the activity.

The Administrator must add the Duration field for the Suspend activity, Reopen activity, and Start prework, context layout screens with a Read-Write or Mandatory visibility. When the user opens these screens, the application populates the Duration field with the activity’s initial value. Users can manually modify this value, which has the following impact:

- The new pending activity is populated with the value submitted on the Suspend activity screen.
- Prework is populated with the value submitted on the Start prework screen.
- The reopened activity is populated with the value submitted on the Reopen activity screen.
Mark an Activity as Not Done

When you select Not Done, the activity appears as completed on your route. This status closes the activity so that you can move on to the next customer.

1. From the Activity details screen, click Not Done.
   The Not done activity screen displays.
2. Select the reason why the work could not be done from the drop-down list, and enter any notes you think might be helpful.
3. Click Submit.
4. The activity moves to the closed list and is color-coded with the not-done status color.

Reschedule an Activity

If you user type allows it, you can reschedule an activity for another day.

1. From the Activity details screen, click the activity that you want to reschedule.
   The details screen for that activity displays.
2. Click Reschedule.
   The Reschedule Activity screen displays.
3. Click the date to which you want to move the activity.
   - Blue dates are in the future and can be selected
   - Black dates are in the past and cannot be selected

Oracle Field Service Cloud checks your schedule for that day and then displays the times in your schedule that are available for moving this activity. Rescheduling options include the following:
   - Not ordered
   - Set first
   - After (an activity)
   - Set last

If no schedule information is available, Oracle Field Service Cloud displays Not Ordered and Ordered.

4. Select a rescheduling option for this activity.
5. Review the alerts in the confirmation screen, and then click Submit.

End an Activity

Once you have completed the work, you must use Oracle Field Service Mobility Cloud Service to close the activity. Depending on your business, ending the activity may include assigning codes, notes, and reasons, as well as obtaining a customer signature.

1. Open the Activity details screen and click End.
   The End activity screen displays.
2. Select the appropriate finding-code options from the drop-down lists, and then click **Submit**.

The activity is marked with a **Completed** status, and will appear in blue on the list view in the **Closed** section.

### Manage Activities from a Map

You can manage a large number of activities from the Mobility map in a fast and efficient manner.

Non-scheduled activities can be viewed and assigned considering the geographical information, resource’s work skills, and urgency of the activity. The map includes the ability to:

- view assigned activities on the map and in the form of a list
- view the resources start and end location
- identify intervals of available time in the route list
- view nearby non-scheduled activities and their priorities (Urgent, Normal and Other)
- review additional details of route and nearby activities
- estimate a summary duration of the selected group of nearby activities
- assign and schedule multiple nearby activities to the route in a single step
- estimate distance using the map scale
- review and order the new route, including seeing any constraint violations

The number of locations displayed on the Map will vary depending on the device screen size; this could range from few dozens to hundreds.

The location of the non-scheduled activities will be displayed based on priority using the following grades:

<table>
<thead>
<tr>
<th>Type</th>
<th>Definition</th>
<th>Order by</th>
<th>Marker Size/Color</th>
</tr>
</thead>
</table>
| **Urgent Activities**    | Activities that have one of the values of priority property specified in the business rules on “Urgent” Activity Priority Configuration. | • specified in the business rules on “Urgent” Activity Priority configuration.  
                            |                                                                            | • aid — activity creation time                                               | Big/Red           |
| **Normal activities under risk** | Activities that have one of the values of priority property specified in the business rules on “Normal” Activity Priority Configuration. | • order specified in the business rules on urgent “Normal” Priority configuration.  
                            |                                                                            | • SLA end — the SLA ends before the end of the given day  
                            |                                                                            | • activity creation time (aid)                                               | Big/Pink          |
| **Normal activities**    | Activities that have one of the values of priority property specified in the business rules on “Normal” Activity Priority Configuration. | • order specified in the business rules on urgent “Normal” Priority configuration.  
                            |                                                                            | • SLA end                                                                   | Big/Yellow         |
## Field Resource Activities

<table>
<thead>
<tr>
<th>Type</th>
<th>Definition</th>
<th>Order by</th>
<th>Marker Size/Color</th>
</tr>
</thead>
</table>
| Other activities under risk       | Any other activities that have SLA ends before the end of the given day  | • SLA end — the SLA ends before the end of the given day  
• activity creation time (aid)   | Small / Yellow                                                             |
| Other activities                  | Any other activities                                                      | • activities with SLA end ordered by SLA end, then activities with undefined SLA end  
• activity creation time (aid)   | Small / Red                                                                |

### Select Activities to Manage

You can click on any activity marker to view the details of the activity.

When selecting a multi-marker, the activity details of the group appears on the screen.

1. Log in to Oracle Field Service Cloud Mobility. A list of your activities for the day is displayed.
2. Click Map. The map and activity list appears on the screen.
3. Select the Scheduling layer from the layers icon to display non-scheduled activities.
4. Click an Activity Marker. The activity details appear on the screen.

### Assign or Schedule Activities

You can assign activities to the route by clicking on each activity separately.

The selected activities information is displayed at the bottom of the screen or on the left side based on the screen size.

When you click Assign, the selected activities are added to the route. If the activity cannot be added for reasons such as losing service window or beyond access hours and schedule, an alert is displayed. When you click Dismiss, the activities are removed and not added to the route.

Activities are added to the route and you can change their order by moving the activities within the activity list. Once in the desired order, click Confirm to add the activities to the route. If you click Dismiss, the activities are removed.

1. In the Activity Details, click Dismiss to go back to the map or Assign to add the activities to the route for ordering.
2. Drag and drop the activity to the desired position in the route.
3. Click Dismiss to remove an activity from the route or Confirm to add the activity to the route.
Move Activities

You can move the location of the activities from one point to another in the map screen.

From the list of activities displayed on the map screen, select one or more activities by clicking on each activity separately. The selected activities information is displayed at the bottom of the screen.

1. Select the activities that you want to move from point to another in the map screen.
2. Click Move.
3. Click Dismiss to keep the activities in existing location or Move the activities to desired location in the map.

Group Operations on Selected Activities

You can perform group operations on selected activities from the map screen.

You can select, review, and assign up to 99 activities at once using the multi-marker.

1. Log in to Oracle Field Service Cloud Mobility. A list of activities for the day appears on the screen.
2. Click Map. The Map and Activities list appears on the screen.
3. Select the Scheduling layer from the layers icon to display non-scheduled activities.
4. Click an Activity marker. The activity details appear on the screen.
5. Click Dismiss to back to the map or Assign to add the activities to the route for ordering.
6. Repeat steps 5 and 6 to add activities to your route.
7. Drag and drop each activity to the desired position on the map.
8. Click Dismiss to remove the activities from the route or Confirm to add activities to the route.

Required operation is performed on the selected group activities.

Adjust Travel Time

You can adjust the time required to travel to the next activity location.

The travel time countdown indicator appears on your screen after you change the activity status to End, Not Done, or Cancel, and displays the travel time to the next activity.
If you are offline and if you select an activity that is not the next activity in the actual route, the travel time to the next location will have a blank value as default. You can choose any value from the drop-down list.

The travel time countdown indicator appears on your screen depending on the mobile device you are using. If your mobile screen width is 540 pixels or more, the indicator is displayed on the right side of the title bar.

For the devices with lesser screen width, the indicator appears as a bar across the top.

As the time remaining decreases, the color of the indicator changes from green to red.

You can adjust the travel time to indicate if you need additional time to travel to the activity site by clicking Adjust. Adjusting the time updates the information that is displayed in the indicator.

Since the indicator displays on many Mobility screens, it still will be visible should you need to navigate away from the Activity details screen.

>Note:

You cannot adjust travel time for next activity for Multiday segments.

How to Adjust Travel Time for Next Activity

You can adjust time required to travel to the next activity in some cases when you are about to complete the current activity.

>Note: The Display and allow adjustment of Travel Time remaining in Mobility option must be checked in Configuration -> User Types screen for the corresponding User Type in order to use this functionality. The behavior is also influenced by the Allow next activity selection on Complete in Mobility option in Configuration -> User Types screen for the corresponding User Type.
When you are about to End, Not Done or Cancel an activity, there is an option available to adjust the travel time for the next activity. You will find different options based on how Allow next activity selection on Complete in Mobility is configured.

1. Start an activity by selecting Start.
2. Change the status of the activity to one of the three options (End/Not Done/Cancel). Either one or both options will appear on the screen:
   - Ability to select the Next Activity from a drop down list. This will display a drop down allowing you to select the next activity to be visited.
   - The Travel Time Remaining selection box.
3. Select required time from the Travel Time drop-down list.
4. Click Submit. The travel time for the next activity will be updated.

Overview of Booking an Activity

When a technician performs an activity at the customer’s premises, the customer may enquire about the possibility to perform another job for them on a different day. The technician must be able to collect the information about the new job, create an activity, and schedule it right away. To book an activity, the technician must also have the ability to check the available capacity for that specific date and time. This situation is handled by the Book new activity option. The Book new activity option is configured in the Mobility section of the Screen Configuration screen.

Accessed via the Mobility application, the feature of allows a user to create an activity in a specified capacity bucket and time slot, which will be then routed on a general basis. To be able to book an activity, the quota must be available in the selected capacity bucket on the selected date and time slot for a specific capacity category. As soon as the activity is booked, the capacity required for its performance is subtracted from the available capacity and added to the used capacity. The used capacity is compared to the quota values to make sure that orders for new activities are accepted only when the capacity is still available. Having capacity information up-to-date is crucial for the functionality, Activity Booking is available only in the online mode.

Create a Booked Activity

The activity booking process includes three steps: creating the activity, scheduling the activity, and updating capacity. This section describes these steps.

You can access the Book Activity function in Mobility in two ways:

- From the action link on the Activity List window
- From the Activity Details screen of an existing activity

You must add the Book Activity action link to the context layouts of the corresponding screens before using the function.

Create a Booked Activity From the Activity List

Use the Book Activity action link located on the menu bar. As the feature is available only in the online mode, the action link is disabled when the mobile device is offline.

1. Tap Book Activity.
   - The Book Activity screen opens with a blank activity booking form.
2. Add the activity and the customer details.
3. Click Dismiss to abort the operation, or click Next to continue with creating the activity.
Create a Booked Activity with Predefined Activity Information

Use the Book Activity action link located in the Activity Details screen. As the feature is available only in the online mode, the action link is disabled when the mobile device is offline.

1. Tap Book Activity.
   The Book Activity screen opens with the details filled in.
2. Edit the details as required.
3. Click Dismiss to abort the operation, or click Next to continue with creating the activity.
4. Click Activity to view the activity details.

Schedule a Booked Activity

The Time Slot screen is displayed when you click Next on the Book Activity screen. Use this screen to schedule a booked activity. The fields displayed on this screen depend on the way you have set up the layout. If the data entered in the previous step (creating booked activity) is insufficient, capacity is not calculated, and an error message is shown.

1. From the Schedule to drop-down list, select the capacity to which you want to schedule the activity.
   The available time slots change based on the selected capacity. The available time slots are displayed in Green and the current date is highlighted.
2. Use the navigation arrows to review the time slot availability in future dates.
   Time slots are displayed for a maximum of 45 days from the current date.
3. Tap the time slot in which you want to schedule the activity.
   You can select only one time slot for an activity.
4. Tap Details to view the activity details.
5. Tap Submit.
   The message, Activity has been booked appears.

Related Topics

• Error Messages

Error Messages

This section provides the list of possible errors and the corresponding messages the user may encounter while booking activities.

Missing context error

If at least one of the two contexts (‘Book new activity’, ‘Schedule booked activity’) is not added before using the Activity Booking functionality, the message: Form is misconfigured. Context layout missing appears. Depending on which context is missing, the error is shown so, you can access the corresponding screens.

Validation errors

If any of the mandatory fields is empty on the booking activity contexts (‘Book new activity’, ‘Schedule booked activity’), the validation message, Validation failed, please review your form is shown. If a time slot has not been selected on the Time Slot screen, the activity is not booked and the message, Validation failed, please review your form. Time slot is not selected is displayed.

Capacity calculation errors

Capacity is not calculated in the following cases:

• Data entered in the previous step (creating booked activity) is insufficient.
• A configuration has not been properly performed.
• There is no available capacity that matches with the activity parameters.

The possible error messages that may occur at the capacity calculation stage, that is after submitting information entered in
the booking activity form are as follows:
• Work skills support is disabled at the company level.
• Work skills are not supported by this type of activity.
• Capacity category cannot be determined using the given activity fields.
• The selected activity type is inactive.
• Work zone cannot be determined by the given activity fields.
• Field or property that is required for work zone 'location' value calculation is missing.
• Time slots are not supported by this type of activity.
• Field or property that is required for the duration estimation is missing.
• Field or property required for travel estimation is missing.
• The matching buckets found do not have the required quota for booking this activity.
• Unable to find appropriate quota bucket for this activity.

Working with Multi-day Activities

About Multi-day Activities

A multi-day activity requires several days to complete. The activity is split into segments that can be managed individually
while remaining parts of a single entity.

Due to the specifics of multi-day activities, you must create them in Oracle Field Service Core Manage Cloud Service and
not in Oracle Field Service Mobility Cloud Service. However, as soon as you create and schedule the activity in Oracle Field
Service Core Manage Cloud Service, you can view and manage its segments in Oracle Field Service Mobility Cloud Service.

Multi-day activity segments appear in the activity list on your home screen, and are included in sections according to their
statuses.
Start a Multi-Day Activity

Starting a *multi-day activity* segment in Oracle Field Service Mobility Cloud Service is basically the same as starting a single-day activity.

If a segment is the first pending activity in an activated *route*, click **Start** to access the **Start activity** screen.

When you start a multi-day activity, its status is **started**, regardless of the status of the current segment. The **Progress** field shows the progress of the multi-day activity performance, both in percentage and the number of segments.

![Start activity screen](image)

Cancel a Multi-Day Activity

You can cancel any pending *multi-day activity* or pending segment of a multi-day activity.

In addition to the fields usually present on the **Cancel activity** screen for single-day activities, this screen has a special **Multi-day activity is finished** check box that allows you to cancel the entire multi-day activity together with the current segment. Checking the check box, confirms that you are completing the entire activity, together with the segment. When the current segment is the last segment of a multi-day activity, this check box is enabled by default, otherwise it is disabled.

If you choose to cancel only the current segment (by leaving the check box unchecked), the **Cancel activity** screen has the **Time to complete** field showing the remaining duration of the multi-day activity. Initially, the **Time to complete** value is the total duration of the multi-day activity minus the duration of the finished segments. The **Time to complete** can be adjusted simultaneously with canceling a segment.
If you choose to cancel the entire multi-day activity and check the check box, the **Time to complete** field is hidden.

**Complete a Multi-Day Activity**

You can complete a started segment of a *multi-day activity* by clicking **End** and entering the required information.

In addition to the single-day activity fields, a **Multi-day activity is finished** check box displays on the on the **End activity** screen. When checked, you confirm that you are completing the entire activity together with the segment. When the current segment is the last segment of a multi-day activity, the check box is enabled by default, otherwise it is disabled.

If the last segment is completed simultaneously with the expiration of **Time to complete**, the multi-day activity is completed. However, if **Time to complete** is longer than the duration of the last segment, the remaining duration is moved to the non-scheduled pool after the completion of the last segment, and the multi-day activity remains **started**.

If you choose to complete only the current segment (by leaving the check box unchecked), the **Time to complete** field on the **End activity** screen shows the remaining duration of the multi-day activity. Initially, the **Time to complete** value is calculated according to the following formula:

\[
\text{Multi-day activity duration} - \text{Duration of finished segments} - (\text{current time} - \text{start time})
\]

The **Time to complete** value can be adjusted simultaneously with completing a segment.

> **Note:** Changing the **Time to complete** value results in recalculation of the remaining pending segments of the multi-day activity and may cause changes to their number and/or duration.

If you choose to complete the entire multi-day activity and enable **Multi-day activity is finished**, the **Time to complete** field is replaced with the **Multi-day activity status** field, allowing you to select either **completed** or **not done** from the drop-down list as the final status of the multi-day activity.

The final status of a segment may be different from the final status of the entire multi-day activity. For example, a segment can be closed as **not done** while the activity will have the **completed** status, and vice versa.

If you choose to complete the entire activity together with completing a segment that is not the last in the multi-day sequence, all subsequent segments are deleted from the route(s).

You can set a multi-day activity as not completed in a similar manner, except the final status of the activity will be **not done**.

The **not done** button of a started segment behaves in the similar manner, also offering an option of completing the entire multi-day activity or setting it as not done.

**Unrouted Activities**

**About Working with Unrouted Activities**

You can use the **Nearby Activities** screen to view unrouted activities, either in a list or on a map. Depending on your user type, you might also be able to move the unrouted activities to your route.
Find Nearby Activities

Field personnel equipped with mobile devices can consult a map that displays their route as well as any pending and unassigned activities close to their current location. Users configured for self-assignment can add nearby activities to their routes.

✏️ **Note:** To use this feature you must have permission to self-assign configured in your user type.

1. Click **More** on the home screen and select **Nearby Activities** from the drop-down list.

A map that looks something like this displays:

The map includes your scheduled (numbered) activities, as well as colored flags that indicate the status of nearby activities that are unassigned. Both the size of the flag and its color indicate the urgency of the activity.

- Large markers indicate an activity that is SLA-critical
- Smaller markers indicate activities that are not as critical
- Zoom in to see all activities
- Zoom out to eliminate the less critical flags from the display

The list to the right of the map groups activities based on:
2. Click **List** to display groups of activities.

   ➤ **Note:** Devices with larger screens will display both the map and the list.

   The groups are based on the following:
   - **Distance**: This group contains all unrouted activities listed by order of distance from your current location. Activities that are closest to you are listed first followed by activities that are farther away.
   - **Time bounds**: This group contains all unrouted activities listed in order by SLA window expiration. The activities that will expire the soonest are listed first under subheadings, such as **Expires in 1 day**, **Expires in two days**, and so on, with 30 days being the maximum expiration period.
   - **My route**: This group includes the activities that are already assigned to your route. You cannot move these activities.

3. Click an item in either the map or the list to display a hint box that includes more information, as well as a **Move** link.

4. Click the **Move** link to display the **Activity Move** screen:

   Use this screen to position this activity relative to the other activities on your route.

5. On the confirmation screen, click **OK** to remove the activity from the pending list to your route.

### Inventory

#### View Inventory

You can view the inventory associated with each job on your route.

1. Click or tap an activity on your home screen.

   ➤ **Note:** A message in red displays if you are missing any inventory required for that activity.

   The **Activity details** screen displays.

2. Click or tap **Inventory** to view the inventory list.

   The **Inventory List** screen displays. Inventory at the customer location is listed under a green house icon. All of the inventory on the technician’s truck is listed under a yellow truck icon.

3. Click or tap the serial number to display the **Inventory details** screen.
Find Inventory

Field managers and resources can search the Parts Catalog for inventory that is required for installation, maintenance, or repair jobs.

While resources usually can predict which parts they will need to have on their trucks, the final determination can only be made when at the customer’s site. The Parts Catalog allows resources to search for and view details about a part, such as price and availability.

The Parts Catalog updates automatically every 30 minutes after Oracle Field Service Mobility Cloud Service is launched, and supports both online and offline activity.

1. Do one of the following:
   - (Field manager) From the Manage (time view) screen, first select a resource and then click or tap the clipboard icon to access the Activity details screen.
   - (Resource) Ensure that you are viewing your home screen.

2. Click or tap the Search (magnifying glass) icon to open the search window.

The first time you perform a search, the Parts Catalog starts to download, and the top (percentage) indicator changes as the download progresses. The bottom (cache) indicator tells you how much memory is being consumed. When the download completes, the progress indicator displays Downloaded and the cache indicator displays the total memory consumed. Once cached, the Parts Catalog is available for use when working offline.

3. Enter the name of the part for which you want to search, for example, “Monitor”, and then click or tap Search. A list of results displays.
4. Click or tap the part number to display the **Catalog item details** page.

**Related Topics**
- Add, Exchange, or Uninstall Inventory
- Send Information to a Piece of Inventory

**Add, Exchange, or Uninstall Inventory**

When you install or uninstall *inventory*, you move items from your resource pool to the customer pool, and vice versa.

1. Click an activity on your home screen.
   
The **Activity Details** screen displays.

2. Click **Inventory**.
   
The **Inventory list** screen displays.

3. Click the piece of inventory that you want to add, exchange, or uninstall to display its serial number, and then click the corresponding number.
   
The **Inventory details** page displays.

   ✍️ **Note:** Inventory actions generally only appear after an activity has been started.

4. Click **Add**, **Exchange**, or **Deinstall**.
   
   If this is an exchange, the **Exchange inventories** screen displays. The screen contains a list of inventory items and their associated serial numbers.

5. Click the serial number of the piece of inventory that you want to replace.
   
The screen updates to show the inventory installed at the customer’s location, as well as the inventory in the resource pool that you are carrying in your vehicle.
Note: If you make a mistake, you can undo an install or deinstall. Click on the serial number of the device and perform the opposite action. For example, click Deinstall if you installed a device in error.

Send Information to a Piece of Inventory

When inventory has been installed and specifically configured, you can send certain information to it using a service request. For example, if the piece of inventory is a cable box, you might need to send the list of channels or you might send a test message to make sure that the connection is working.

1. Mark the piece of equipment as installed in the Oracle Field Service Mobility Cloud Service interface.
2. From the list of installed equipment, click the serial number of the piece of inventory to which the information will be sent.
   The Inventory details screen displays.
3. Click Hit Inv.
   The Send request screen displays.
4. Select the request and hit types from the drop-down lists.
5. Click Submit.
   The screen refreshes with the request details.

Related Topics
- Add, Exchange, or Uninstall Inventory

Search the Parts Catalog

The search function in Mobility allows you to search inventory in the Parts Catalog, as well as in all other inventory pools.

The search key that you enter must contain a minimum of 3 symbols. Leading and trailing spaces are not included in the search key. The key is then matched against all inventory pools associated with the current resource, and against the inventory in the Parts Catalog.

Note: If the search key is only found in one source, the section for the other does not display.

This figure shows Parts Catalog after inventory search.
The search results in the Inventory list are marked with pool icons to help you easily determine the pools in which the inventory item is found. If an item found in the Parts Catalog also happens to be in the resource’s pool, the item is marked with a truck icon.

If you select an item from Inventory, the Inventory details screen is displayed. If you select an item from the Parts Catalog, the Catalog item details screen is displayed. This screen displays the following information:

- General information about the selected catalog item
- A Linked items section that suggests items that you can use instead of the selected Parts Catalog item. Click a linked item. A screen with the details of the linked item is displayed.
- An images section that shows available images of the selected item

If the selected item can be found in the resource’s inventory, the Catalog item details screen also includes a Quantity in the truck section that shows how many units the resource has.

If you initiated the search from the Add to installed or Add to deinstalled dialog of a started activity, you can click Select to select any item found in the Parts Catalog.

This figure shows the Select button in Parts Catalog.
The item’s properties will also automatically populate the appropriate fields on the screen from which you initiated the search.

Find and Share Nearby Inventory

If you want to move an activity, you can view nearby bucket resources to find someone who can take the job.

To search inventory and broadcast a message to nearby Resources:

✏️ Note: The Find Nearby Inventory tab will be active only for those resources who are online and when the location attributes are available for that resource.

1. In the Parts Catalog, type the name of the part to search in the search box.
   After searching for the selected item, the Parts Catalog displays a list of inventories that match the searched keyword.
   The image displays the Parts Catalog window.
2. Click the required inventory to search. The Parts Catalog displays the Part details. The image displays the Parts Catalog window.

3. Click the **Find Nearby Inventory** tab. The Find Nearby link will be active ONLY if the following conditions are true:
   - Company has Smart Collaboration and Smart Location
   - User type of corresponding user has Collaboration enabled.
The image displays the Find Nearby Inventory tab showing the list of nearby resources with the inventory.

4. After searching for the selected item, the application displays a list of Field Resources in the nearby locations with real time travel duration for those resources.

The image displays the Find Nearby Inventory tab showing the list of nearby resources with the inventory.
5. Select all the check boxes corresponding to those resources who have the required inventory.

6. Click Start Chat to invoke a broadcast message. The Broadcast chat window is displayed.

7. Type a broadcast message requesting to share the inventory and click the Play icon. The message will be sent to all selected resources simultaneously.

   The image displays the Broadcast Chat window with a broadcast message.
8. Resources who have enough inventory with them can collaborate and share the inventory to finish the job.

Track the Caching Process of Parts Catalog

You can track the current status and progress of the Parts Catalog caching process in Mobility. The caching progress is used to calculate how long a resource has to stay online before leaving an area with reliable level of connectivity.

Prerequisites are as follows:

- For Setup environments with Parts Catalog containing 100000 or more items, the total amount of raw items data must be more than 10 MB.
- Setup user must have access to the Mobility and Parts Catalog modules.
- Mobile devices must have Internet Explorer Mobile 11 (for Windows), and Chrome (for Android).
- Mobile devices must have the possibility to simulate low bandwidth connectivity.

1. Open the Mobility screen.
2. Select any resource on the Mobility screen and click the Search icon.
A progress indicator displays the status of the Parts Catalog caching process:

- **Initialization**—Indicates that caching has just started
- **Loading**—Indicates that caching is in progress displaying the percentage of caching that has completed.

> **Note:** When internet connectivity is relatively slow and a significant number of items exist in Parts Catalog, Loading status may show up to 30 or 60 minutes.

- **Loaded**—Indicates that caching has completed

### About Working Offline

When you do not have Internet access, you still can manage your route and continue to perform many of your daily tasks.

The word **Offline** in orange text below your name on your home screen indicates that your Internet connection is not stable enough to support online operations, and that cloudfieldservmobility is not sending or receiving information. Activity tasks and options that are not available when working offline are disabled in the menu bar.

Tapping the word does two things:

- Displays a message confirming that you are offline
- Initiates the synchronization process, which checks the availability of an Internet connection

When you work offline, your actions are saved in your browser’s memory. The actions synchronize with the cloudfieldserv server as soon as your mobile device is back online. Subsequently, there is no need for you to check your Internet connection continuously. When the connection is restored automatically, the **Offline** text disappears and the normal menu bar displays.

> **Important:** Offline storage capacity is limited, and is device- and browser-dependent. For example, iOS browser storage capacity is 5MB; Chrome on Android is 10MB. One way to minimize the amount of data that needs to be stored offline is for field managers to configure Oracle Field Service Mobility Cloud Service screens to show only the information that is essential for job performance.

If you suddenly lose your connection, you should also be aware that:

- You will be redirected to your home screen if you are in one of the screens that is not available in the offline mode.
- You cannot send or receive updates to your route. You must contact dispatch to review all changes that affect your route.
- Your might see a message telling you that you have exceeded your browser’s memory-storage limit, indicating that some of your actions will not be saved.

Some things you should know about the synchronization process:

- If synchronization completes successfully, a **Synchronization completed** message appears and the normal online screen displays.
- If a synchronization error occurs, an **Internal error. Please review your route.** message displays.
- If you attempt to access one of the online-only screens when the connection has just been restored but the synchronization process is not yet complete, a **Synchronization in progress. Please wait.** message appears, along with a red **Loading** indicator in the bottom-right corner of the screen.
<table>
<thead>
<tr>
<th>You can:</th>
<th>You cannot:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>For the route</strong></td>
<td><strong>For resources</strong></td>
</tr>
<tr>
<td>• Activate/deactivate/reactivate route</td>
<td>• Log in/log out</td>
</tr>
<tr>
<td>• Browse the activities list</td>
<td></td>
</tr>
<tr>
<td>• Print the route</td>
<td><strong>Note:</strong> If you close and then reopen your browser during the time you are offline but are within the session expiration time, the browser will restart and the offline session will resume. Enter the URL of any Oracle Field Service Mobility Cloud Service screen to access the Restore screen.</td>
</tr>
<tr>
<td>• Add activities</td>
<td>• Change your password</td>
</tr>
<tr>
<td>• Send resource requests</td>
<td>• View maps, directions, or map layers</td>
</tr>
<tr>
<td>• Browse the resource-request list</td>
<td>• View calendars</td>
</tr>
<tr>
<td>• Browse resource-request details</td>
<td>• Select a resource or change users</td>
</tr>
<tr>
<td><strong>For scheduled activities</strong></td>
<td>• Change options</td>
</tr>
<tr>
<td>• Change activity order/position in the route</td>
<td>• Manage activities not on today’s route</td>
</tr>
<tr>
<td>• Browse activity details</td>
<td>• Add a teamwork activity</td>
</tr>
<tr>
<td>• Edit activity details</td>
<td>• Reschedule an activity</td>
</tr>
<tr>
<td>• Set an activity to started/completed/canceled/delayed/suspended/not done</td>
<td>• View nearby activities</td>
</tr>
<tr>
<td>• Delay/adjust time</td>
<td>• View activity history</td>
</tr>
<tr>
<td>• Create/complete/delay pre-work</td>
<td>• Download and view thumbnails of files, images, and signatures</td>
</tr>
<tr>
<td>• Send activity requests</td>
<td><strong>Note:</strong> You can add new files to the activity when you are offline, but they are synchronized only when you are back online.</td>
</tr>
<tr>
<td>• Browse the activity-request list</td>
<td>• Preview files that are already on the server</td>
</tr>
<tr>
<td>• Browse activity-request details</td>
<td>• Use action links that are only available for online use</td>
</tr>
<tr>
<td><strong>For non-scheduled activities</strong></td>
<td>• Use Oracle Field Service Collaboration Cloud Service</td>
</tr>
<tr>
<td>• Send activity requests</td>
<td>• Use Oracle Field Service Smart Location Cloud Service</td>
</tr>
<tr>
<td>• Cancel activities</td>
<td><strong>Functionality for field managers only</strong></td>
</tr>
<tr>
<td>• Browse activity details</td>
<td>• Move an activity to another resource (when move within a user’s route is enabled)</td>
</tr>
<tr>
<td>• Edit activity details</td>
<td>• View all resources on the resource selection screen if all resources do not fit on a single screen</td>
</tr>
<tr>
<td><strong>For inventory</strong></td>
<td>• View the Manage screen</td>
</tr>
<tr>
<td>• Browse the inventory list</td>
<td>• Perform resource-management functions including, but not limited to:</td>
</tr>
<tr>
<td>• Browse/edit inventory details</td>
<td>o Create/edit groups</td>
</tr>
<tr>
<td>• Add/edit/install/deinstall/exchange inventory</td>
<td>o Make calendar changes</td>
</tr>
<tr>
<td>• Send inventory requests</td>
<td>o Use the team map</td>
</tr>
<tr>
<td>• Browse the inventory-request list</td>
<td>o Use the Gantt view</td>
</tr>
<tr>
<td>• Browse inventory-request details</td>
<td></td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td><strong>Note:</strong> These tasks are in addition to the ones listed above.</td>
</tr>
<tr>
<td>• Manage activity links (with some constraints)</td>
<td>• Move an activity to another resource (when move within a user’s route is enabled)</td>
</tr>
<tr>
<td>• Search the Parts Catalog (if provisioned and cached)</td>
<td>• View all resources on the resource selection screen if all resources do not fit on a single screen</td>
</tr>
<tr>
<td>• Work with multi-day activities (however, the number of segments cannot be calculated correctly)</td>
<td>• View the Manage screen</td>
</tr>
<tr>
<td></td>
<td>• Perform resource-management functions including, but not limited to:</td>
</tr>
</tbody>
</table>

Oracle Field Service Cloud
Using Core Application

Chapter 3
Field Resource Activities

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Teamwork

About Working as Part of a Team

Teamwork is a feature that enables a mobile employee or group of mobile employees to assist each other either on a single job or on an on-going basis.

Some companies use teamwork to assign a trainee to work with a more experienced technician. Others use teamwork to assign a van to a technician.

Teamwork includes two roles:

- Team leader: The person who is being assisted.
- Assistant: The person who is assisting the team leader.

If you are the assistant for a particular activity, the time displays in your route as either Assisting or Teamwork.

If you are a team leader, the activity appears in your route as a regular activity.

You must start and complete teamwork activities the same way that you start and complete regular activities.

Collaborate with Other Team Members

You can use the Community feature to communicate and collaborate in real time with other members of your team.

From the Community window, you can search for other members of your team, add them to your address book, and initiate a chat or call with her or him.

When you tap the Community icon ( ) located on the top right of the Activity details screen, a window similar to the following displays:
<table>
<thead>
<tr>
<th>To:</th>
<th>Do this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for contacts</td>
<td>Do one of the following:&lt;br&gt;• Tap <strong>Search Contact to Start a Conversion</strong>&lt;br&gt;• Enter a contact name in the <strong>Search</strong> field</td>
</tr>
<tr>
<td>Start chatting with a contact</td>
<td>1. Select a contact from your <strong>Community</strong> list.&lt;br&gt;2. Tap the contact’s name.&lt;br&gt;3. Type your chat in the text-entry field and tap <strong>Return</strong>.</td>
</tr>
<tr>
<td>End a conversation</td>
<td>1. Tap the <strong>Community</strong> icon.&lt;br&gt;2. Tap <strong>Leave Conversation</strong>.</td>
</tr>
<tr>
<td>Invite a contact to chat</td>
<td>1. Select the contact from your <strong>Community</strong> list.&lt;br&gt;2. Tap the <strong>Community</strong> icon.&lt;br&gt;3. Tap <strong>Invite User</strong>.</td>
</tr>
<tr>
<td>Display Community history</td>
<td>1. Tap the <strong>Community</strong> icon.&lt;br&gt;2. Tap <strong>History</strong>.</td>
</tr>
<tr>
<td>See who’s working near your physical location</td>
<td>1. Tap the <strong>Community</strong> icon.&lt;br&gt;2. Tap <strong>Who’s Nearby</strong>.</td>
</tr>
<tr>
<td>Display a contact’s information</td>
<td>1. Select a contact.&lt;br&gt;2. Tap the <strong>Community</strong> icon.&lt;br&gt;3. Tap <strong>User Info</strong>.</td>
</tr>
<tr>
<td>Share your location with a contact</td>
<td>1. Select a contact.&lt;br&gt;2. Tap the <strong>Community</strong> icon.&lt;br&gt;3. Tap <strong>Share Location</strong>.&lt;br&gt;<strong>Note:</strong> Tap <strong>Modify</strong> if you wish to change your location.&lt;br&gt;4. Tap <strong>Return</strong> to send your location.</td>
</tr>
<tr>
<td>Call a contact from your mobile device</td>
<td>1. Select a contact.&lt;br&gt;2. Start a new conversation.&lt;br&gt;3. Tap the <strong>Community</strong> icon.&lt;br&gt;4. Tap the telephone icon to initiate the call.</td>
</tr>
<tr>
<td>Display a contact’s history</td>
<td>1. Select a contact.&lt;br&gt;2. Start a new conversation.&lt;br&gt;3. Tap <strong>History</strong>.</td>
</tr>
</tbody>
</table>
To: | Do this:
---|---
4. | Enter a keyword and tap **Search**.

Add or remove a contact from your address book

1. | Select a contact.
2. | Start a new conversation.
3. | Do one of the following:
   - Tap **Add From Address Book**
   - Tap **Remove From Address Book**

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**Resource Calendars**

The **Calendars** screen allows field managers to view and update the working, non-working, and on-call time assigned to the resources.

You also can view and edit resource-calendar information for an individual resource by clicking or tapping on their name in time view.

The screen is a grid with resource names in the rows and dates in the columns. The screen displays as many columns as it can currently fit subject to size and orientation. When first opened, the screen shows the current date highlighted in red color in the first column.

You can scroll left or right to view past or future days by swiping a finger along the screen. As the calendar scrolls, additional columns are loaded. If you want to view the current date without swiping your screen, you can use the red colored arrow present in the date column.

If you scroll to view any future date and you want to return to the current date, use the left directional arrow present in the date column.
Similarly, if you scroll to any earlier date and you want to return to the current date, use the right directional arrow.

The date range displayed on the screen is defined by the business-rules settings in Oracle Field Service Core Manage Cloud Service.

Working time is shown in pale turquoise with its duration in a deeper color. On-call working time is shown in white with the yellow telephone "on-call" icon. If a resource has both regular and on-call working time on the same day, the cell is divided into two parts containing information on two different working schedules.

Each cell represents the work calendar of the selected resource for the selected day. A cell can correspond to regular working time, on-call working time, a combination of both, or non-working time. If a resource has no schedule on a particular day, the cell is blank.

If a resource has overlapping regular and on-call calendars, the regular calendar takes priority and displays the overlap period. The calendar starting earlier is shown first in a cell.

Non-working time, such as vacation time, is shown as a blank cell containing the non-working reason.

The column header contains the total available working time of all resources in the group. The time is expressed in any of the following units of measurement:

- Man-hours (the default unit of measurement)
- Points (can be used if a company uses points in its workforce management)
- Scheduled (the number or resources with working calendars for a particular day)
- FTE (full-time equivalent; sets the standard duration of a working day, as defined by the full-time equivalent parameter on the Business Rules screen in Oracle Field Service Core Manage Cloud Service.

You can select the units of measurement which are the most suitable for your needs by clicking a column header. The column header produces a hint containing all available units of measurement with their equivalent values for the selected column.
**Note:** Changing units of measurement from any column will change them for the entire grid.

If they have been pre-loaded, the hint also shows planned working time-values. If no plan has been loaded, the **Planned** column shows dashes instead of actual values. Otherwise, the planned values display in the units of measurement in which they were loaded, and the hint contains an additional **Variance** column, which shows the difference between the actual and planned values.

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**End Your Day**

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**About Ending Your Day**

Before you end your day, you must deactivate your **route** and log out of Oracle Field Service Cloud.

Also, you need to make sure that the data is synchronized before logging out of Oracle Field Service Cloud Mobility app or locking your mobile device. You need to check the header that displays one of the following four statuses:

- **No text** – This status indicates that the network connectivity is available and there is no data present on the device to be synchronized. You can logout of the device.
- **Offline** – This status indicates that there is no network connectivity and no data is to be transferred to the server.
- **Sending data** – This status indicates that there is some data on the mobile device that needs to be synchronized. In this case, it is better to remain online till the data synchronization is complete.
- **Offline. Sync required**- This status indicates that the technician is offline and there is data that needs to be sent to the server.

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**Deactivate the Route**

Before you deactivate the **route**, verify that all of your activities have been completed or cancelled.

At the end of the day, you must deactivate your route, and all should be listed in the **Closed** section of your home screen. This notifies dispatch that you are no longer available to take jobs.

**Note:** Any pending activities remaining should be managed according to the customer’s business rules - rescheduled to another date, cancelled, or not done. The **Deactivate Route** menu option will not appear until there are no more pending activities on the route.

1. Click **Deactivate Route** on your home screen.
   The **Deactivate Route** option displays only when you mark all activities as **Closed** on the activities list.

   **Note:** If the option is not displayed, verify that you have completed all of your activities.

2. Click **Yes** on the confirmation screen.
Log Out

To keep the information in Oracle Field Service Cloud secure, you must log out of the system when you are finished for the day.

1. Ensure that you are on your Oracle Field Service Cloud Mobility home screen.
2. Click **Logout**.
Revision History

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

<table>
<thead>
<tr>
<th>Date</th>
<th>What’s Changed</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>February 2019</td>
<td>• Find and Share Nearby Inventory</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Use the Assign to Team Function</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Search functionality improvements</td>
<td></td>
</tr>
<tr>
<td>November 2018</td>
<td>• Minor updates</td>
<td></td>
</tr>
<tr>
<td>May 2018</td>
<td>• New document for 18C</td>
<td></td>
</tr>
</tbody>
</table>