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Preface

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

Using Oracle Applications

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

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.
Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

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

- For web-based user guide, Web-based User Guide Survey
- For tutorial feedback, Tutorial Survey
1 Understanding Browser Support

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.
2 Understanding Mobility Cloud Service Best Practices

About Mobility Cloud Service Best Practices

Oracle Field Service Mobility Cloud Service works best when it is receiving accurate information. For best results and to make your day-to-day work run smoothly, follow these best practices:

Activate your route on time. This lets dispatch know that you are on the job and ready for work.

- **Activate your route or queue**

Start and stop your jobs when you actually start the work and end the work.

- **Start an activity**

If you forget to start a job, contact your dispatcher or supervisor and give them your actual start time so they can start the job for you and enter the actual time you started.

If you find that your job will take longer to complete than the duration assigned to it, add time to the job right away.

- **Add time to an activity**

Follow your company’s procedures for those times when you cannot complete the activity.

- **Suspend an activity**
- **Mark an activity as Not Done**
- **Rescheduling an activity**

Add activities to designate time that is used for anything work related, even company meetings, lunch breaks, and stops for gas.

- **Add an internal activity**

Deactivate your route at the end of day.

- **Deactivate the route**

Logout when you are finished for the day.

- **Log out**
3 Start Your Day

About Starting 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

• About Creating and Using 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.

About Creating and Using 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.

Related Topics

- Change Your Password

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.
4 Understanding the User Interface

About Mobility Landing Page

The Mobility landing page (resource base screen) provides useful information about a resource like the activity details, route, etc.

The Mobility landing page can be configured using the ‘Field Resource Landing Page’ parameter. Users will see either the Activity List view or the Dashboard depending on the configuration.

Activity List

When the Activity List option is selected, Mobility users will see the list view when logged in.

Dashboard

When the Dashboard option is selected, Mobility users will see a dashboard after logging in. The screen displays a number of tiles related to activities, travel details, route details, team details, etc. This information on the same screen helps you to make decisions instantly without having the need to navigate to different screens in Mobility. Based on the device, the content appears either in narrow or wide screen mode.
The tiles are shown in the following order:

- Resource Info
- Activate/Deactivate/Reactivate Route
- Current/Next Activity
- My Route
- My Team
- Activities

The order of Assign To Team, Inventory, Add activity, Options, and Plug-in tiles is based on the action links configured for Activity List.

The Calendar Panel

The calendar panel appears on the Landing page when the user clicks on the date present on Resource Info tile. The user can get the following information for future dates:

- On-call — The phone icon appears if the resource has an On-call shift on the selected date
- Workload — A dot appears if the resource has at least one activity for the specific date. This does not apply for mass repeating activities.
- Non-working day — The date appears grey

A Hamburger menu contains action items configured for the Activity List screen in Mobility.

<table>
<thead>
<tr>
<th>Add Activity</th>
<th>Start activity</th>
<th>Inventory</th>
<th>Activate Route</th>
<th>Print</th>
<th>Select Resource</th>
<th>Resource Info</th>
<th>Options</th>
<th>Nearby Activities</th>
<th>Map</th>
<th>Logout</th>
</tr>
</thead>
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<tr>
<th>5</th>
<th>6</th>
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<td>Sat</td>
<td>Sun</td>
<td>Mon</td>
<td>Tue</td>
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</table>

A Hamburger menu contains action items configured for the Activity List screen in Mobility.
Offline mode

When the user goes offline:

- The tiles on the Landing page and links in Hamburger menu that are offline mode dependent turn grey and cannot be clicked. In case of Resource Info, even though the option cannot be clicked, the color remains unchanged.
- Arrow ‘>’ near Team holder name will not be available and it disappears.
- ‘Offline’ warning appears in the header.

Note: If a resource has more access to two or more resources, the Time View (Manage) in Mobility will be displayed.

Related Topics

- Understanding How to Access Time View in Mobility

About Landing Page Dashboard Tiles

The Mobility landing page displays information about a resource’s route, activity details, etc.

The landing page has the following dashboard tiles:

- Resource Info
- Activate Route / Deactivate Route / Reactivate Route
- Current / Next Activity
- My Route
- My Team
- Activities
- Assign to team
- Inventory
- Add Activity
- Options
- Plug-in

For information on setting up the presentation plug-in tiles on the Dashboard Landing Page, refer to the Mobile Plug-in Framework Guide.

About the Resource Info Tile

This tile contains information about the technician.

The following details are displayed in this tile:

- photo
• name
• current date
• shift start — end time

If resource photo is not available (for example, the photo is not uploaded or when offline), resource initials are displayed instead.

Click on this tile opens ‘Resource Info’ screen if ‘Resource Info’ action link is added to Activity List screen in Mobility. On contrary, if such action link is not added, the tile is not clickable.

You can access the Resource Calendar from the Resource Info tile. If you click the date present on the Resource Info tile, the Calendar panel opens.

About Route Activation Tiles

You can activate, deactivate, or reactivate resource route from this tile.

The ‘Activate route’, ‘Deactivate route’, and ‘Reactivate route’ tiles are displayed if the corresponding action link is configured for Activity List screen in Mobility.

Only one of these tiles can be displayed at a time in accordance with the following conditions:

• Activate Route is displayed first. The tile is the link to Activate Route screen. Once route activation time is submitted, the tile disappears. Color of the tile turns green when shift start time is passed.

• Deactivate Route is displayed if route is activated and there are no started and pending activities left in the route. The tile is a link to Deactivate Route screen. Once route deactivation time is submitted, the tile disappears. Color of the tile turns Green when shift end time is passed.

• Reactivate Route is displayed if route is deactivated. The tile is the link to Reactivate Route screen. Once route reactivation time is submitted, the tile is replaced with Deactivate Route.

About the Current and Next Activity Tiles

This tile represents information about actual state of technician route.
It may contain the following elements:

- started activity
- next activity
- travel time to next activity
- idle time

Started activity - current activity the technician is supposed to proceed with at the moment. The tile contains the following elements:

- square block with letter - the color of the block depends on activity type and activity status. If activity address is not resolved, the block is empty.
- activity identifier - list of activity properties configured for Identify activity by screen.

Note: By default, all properties are displayed in a single line. To display each property in separate rows, "End of line" markers can be used when configuring Identify activity by screen.

- arrow - link to Activity Details screen for that activity.
- Adjust button - countdown with projected activity duration. Click on Adjust allows to update the projected duration. The button turns red when less than 5 minutes to activity end is left.
- Complete button - link to End activity screen

Idle time - displays idle time which may occur:

- before the next activity in the route
- between current activity and the next activity
- after the last activity in the route

Idle time is calculated as time period between the end of one activity (projected or actual) and beginning of travel to another activity. So, if one activity is expected to end at 9 AM, the next activity is scheduled for 11 AM and projected travel time between activities is 30 minutes, the duration of idle time is one hour and thirty minutes.

Travel time - is displayed only when resource is moving to the next pending activity in the route. It contains the following elements:

- Adjust button - countdown with projected duration of travel time. Click on Adjust allows to update the projected duration. The button turns red when travel end time has passed.
- Start button - link to Start Activity screen

Next activity - displays activity which is the next in the route but is not started yet. The tile contains the following elements:

- square block with letter - the color of the block depends on activity type and activity status. If activity address is not resolved, the block is empty.
- activity identifier - list of activity properties configured for Identify activity by screen.
Note: By default, all properties are displayed in a single line. To display each property in separate rows, "End of line" markers can be used when configuring Identify Activity by screen.

- arrow - link to Activity Details screen for that activity
- Navigate button - opens device native application to show activity location. The button is displayed if: Navigate action link is configured for Activity Details screen in Mobility AND Activity address is resolved.
- Call button - link you tap to call a number on a phone-capable device. It is displayed if: Customer phone (cphone) property is configured on Activity Details screen in Mobility The customer phone property is not empty

If travel time is not calculated for the next activity (for example, the activity type is Lunch), the next two activities are displayed one after another: Lunch and activity after lunch.

About My Route Tile

The My Route tile appears differently in mobiles with wide screens and narrow screens.

Wide screens

The My Route tile for wide screen contains Workload bar with percent of resource work time load for a selected day.

The Workload is grouped on the basis of following activity statuses:

- Pending
- Started
- Completed
- Suspended
- Not Done

The tile for narrow screen reflects total number of activities in resource route for selected day.
The tile redirects to Route Map screen if Map action link is configured for Activity List screen in Mobility.

This tile is always displayed even if there are no activities in route.

If an activity is route is in jeopardy (for example, Missing SLA window), the tile turns orange.

About My Team Tile

The My Team tile for wide screen represents information about all teams that a resource contributes to for a selected day.

This information is displayed only if the current resource assists to or is assisted by other resource for a selected day.

The team holder’s name is displayed first in the list and is marked in bold. The arrow links to the Dashboard of a team holder. If the current resource is team-holder, the arrow will not appear. Team members are listed further. Different teams are separated with a horizontal divider.

The following notifications may be displayed under resource name:

- Non-working day
- Route is not activated
- Shift start-end — When the resource shift differs from shift of current resource.

Only one item can be displayed, according to their order ('Non-working day' is the highest).
Tile for narrow screen shows total number of resources in all resource teams. Click/tap on this tile to open a separate window with team details.

In case of any warnings (when any team member has ‘Non-working day’ or ‘Route is not activated’), the tile turns orange and the number of warnings is displayed on small tile.

About the Activities Tile

This tile displays the number of non-scheduled activities for a selected resource. Click on this tile leads to the Activity List screen.

About the Assign to Team Tile

This tile displays the activities that can be assigned to a team. This tile is displayed if the create_teamwork action link is configured for the Activity List screen in Mobility.

About the Inventory Tile
Inventory tile is displayed if the list_queue_inventories action link is configured for the Activity List screen in Mobility. Click on this tile to navigate to the Inventory screen.

The tile color turns orange if there are any Started or Pending activities with missing required inventories. In this case it reflects the missing number of inventories.

About the Add Activity Tile

This tile is displayed if add_activity action link is configured for Activity List screen in Mobility. Click on this tile to navigate to Add Activity screen.

About the Options Tile

This tile is displayed if the options action link is configured for the Activity List screen in Mobility.

Click on this tile to navigate to the Options screen in Mobility.

About Sample Plug-In Tile

This separate tile is displayed for each plug-in configured as action link for the Activity List screen in Mobility.
Each tile contains the plug-in name only.

**Activity Color Codes**

Activities that display are classified by color, providing you with a quick view of the status of the day’s schedule.

Color codes can be changed during implementation to reflect the colors your company prefers for representation of the various activities.

- **Pending activity (on time)**
  - Color: Yellow; Hex: FFDE00

- **Pending activity (in jeopardy of being late)**
  - Color: Pink; Hex: FFAAAA

- **Not ordered activity**
  - Color: Light Orange; Hex: FFCC99

- **Pending internal activity or teamwork**
  - Color: ; Hex:

- **Started activity or teamwork**
  - Color: Green; Hex: 5DBE3F
Configure Your Display Options

You can change some of the display options to suit how you work and how you prefer to view information.

Depending on your company’s configuration and your user type, display options might differ.

1. Click Options on your home screen.
   The User options screen displays.

2. Configure the following values:
   - **Language**: The language you want to use
Time format: Either 12- or 24-hour mode. This affects an activity’s start and end times.

Date format: The date format you want to use

Mobile Activity Count: The number of activities you want to see on each page

Mobile Inventory Count: The number of inventory items you want to see on each page

Design Theme: The way you want your mobile application to look

3. Click Submit.

The amount of information will not change, only the way in which it displays on your screen.

Design Themes

When designing themes for your mobile application, you have two options:

- Classic theme
- Vanilla theme

The Vanilla theme displays icons in the header region for the most frequently accessed screens. It has a menu to the left of the screen, which provides access to the remaining screens. The classic style theme displays tabs with text.

Switching between Classic and Vanilla themes:

a. From the home page, select Settings. The User Options page appears.
b. From the User Options page, under the Design Theme drop down list, select the required option (Classic or Vanilla).
c. Click Submit.

Configure the Main Menu

You can configure the Main menu screen context in Mobility.

The configuration affects users using the Supervisor view in Mobility. With this ability, you can add, delete, change the order, and modify the visibility of the Main menu items. You can configure the Main menu from the Oracle Field Service Cloud.

When the user opens the Oracle Field Service Cloud Mobility, Manage will always be seen first even if:

- there are no action links in Main menu
- another action link (menu item) is listed first in the Main menu
- a plug-in is the first item in the Main menu

Change Your Password

Depending on the configured login policy, you can change your password from your home screen.

1. On your home screen, click Options.

The User options screen displays.
2. Click **Change Password**.
   The **Change Password** screen displays.

3. Enter your old password, and then your new password twice.
   Ensure that your new password complies with your company’s password rules.

4. Click **Submit**.

**Related Topics**

- About Creating and Using a PIN

**Assign User Avatars**

You can upload a personal photo for the user for which you are currently logged in. You cannot change a user’s avatar in Manage and can only view the user’s photo uploaded in the Mobility application in Manage. Resources without images will have Initials with background colors displayed as avatars.

This photo will be your user photo. It will also be shown for the resource associated with your user via the main resource property in Core Manage, if such a relationship has been set.

1. Do one of the following to access the **User options** screen:
   - Go to **User menu > Settings**.
   - Click **Options** in the **Activity List** screen of any resource.

   **Note:** You can switch to the Mobility interface of a resource by tapping on their name in the resource hint.

2. Tap **Choose File** to browse to and select the photo you want to upload.
   After you select the photo, it displays on the **User options** screen in the editing mode.
3. Drag the edges of the round crop tool to resize and move the area of the photo that you want to select.

4. Tap **Apply** to preview the cropped photo.

5. Do one of the following:
   - Tap **Submit** to save the photo.
   - Tap **Edit** to return to editing mode and make additional changes.
   - Tap **Dismiss** to discard your changes and return to either time view or the **Activity List** screen.
5 Mobility Cloud Activities

Activities on Your Route

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>Time</td>
<td>Action</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------------------------------------------------</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 Using 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.

**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

Select an Activity to Start

If you have more than one activity in the same location as your next pending activity, you will receive a notification that ‘You have N more activities at this location’ above the Start button.

When you click the Start button, you will get the list of activities placed at the same location. An activity is considered to be in the same location only if the following conditions are true:

- scheduled for the current day
- has resolved coordinates
- has pending status
- must be located in the same location — distance to the next activity must not exceed ‘X’ meters, where ‘X’ is the Resource Parameter
- not blocked by other linked activity

By default, you have the first activity selected. You can select any activity placed at the same location from the list and then click Start.
When you are about to end an activity, you will receive a notification that 'You have more activities at this location' on the End Activity screen. When selecting the next activity, you can notice that the activities present at the same location are highlighted with a location marker next to them.

You can select any of the listed activities and click **Confirm**.

Enabling the Activity Selection Option

By default, this option is not available for all the users. You need to enable it from the Configuration window by following the procedure below:

1. Under the Activity Management section, select the **Suggest activity by location** option.
2. Click **Save**.

A confirmation message appears on the screen. You need to refresh your browser to view the changes.

> **Note:** An activity is considered to be at the same location if the distance is within ‘X meters, where X’ is the Resource Parameter defined under the Smart Location option:

From the Configuration section, under Business Rules, select the Smart Location/GPS option (Resource is considered to be at the activity location if the distance to it is less than X meters).

If you do not have the Smart Location / Professional/ Enterprise Cloud services enabled, then the Resource Parameter is set to 100 meters; you cannot change this value.

> **Note:** This functionality is available in the offline mode as well.
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 red. You will receive an expiration reminder when the countdown reaches five 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 five minutes, the countdown indicator turns 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

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.

Disable Personal Activity Tracking

The user can disable tracking for one or more personal activities such as lunchtime, etc.

If an activity is defined as “Personal” on Activity type screen, then the particular activity cannot be tracked once it is in “Started” state. A message, “Your location is not tracked for this activity” appears on the Landing page about the status of the activity. Location tracking will be resumed once the activity status is changed (for example, end, not done, or suspended) and route is still active.

This functionality is supported in the browser and installed applications (Android and iOS) and requires Oracle Field Service Smart Location, Oracle Field Service Professional Cloud Service or Oracle Field Service Enterprise Cloud Service.
If the option ‘Enable GPS Telemetry’ is not selected under the Configuration-> User Types -> Permissions section, the message will not be displayed.

How to enable/disable this option?

To enable/disable this option:

1. From the Configuration screen, select Activity Types.
2. From the Activity list, select the activity for which you want to disable the location tracking.
3. Click **Modify**.
4. From the list of options, select/deselect the ‘Disable resource tracking for this activity type’ option.
5. Click **Update**.

If you select the ‘Disable resource tracking for this activity type’ option and click Update for any activity; such activity is not tracked.
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 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.

Activity Management from a Map

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>
<tbody>
<tr>
<td>Urgent Activities</td>
<td>Activities that have one of the values of priority property specified in the business rules on &quot;Urgent&quot; Activity Priority Configuration.</td>
<td>• specified in the business rules on &quot;Urgent&quot; Activity Priority configuration. &lt;br&gt; • aid — activity creation time</td>
<td>Big/Red</td>
</tr>
<tr>
<td>Normal activities under risk</td>
<td>Activities that have one of the values of priority property specified in the business rules on &quot;Normal&quot; Activity Priority Configuration.</td>
<td>• order specified in the business rules on urgent &quot;Normal&quot; Priority configuration. &lt;br&gt; • SLA end — the SLA ends before the end of the given day</td>
<td>Big/Pink</td>
</tr>
</tbody>
</table>
### Mobility Cloud Activities

<table>
<thead>
<tr>
<th>Type</th>
<th>Definition</th>
<th>Order by</th>
<th>Marker Size/Color</th>
</tr>
</thead>
</table>
| 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  
• activity creation time (aid) | Big / Yellow |
| 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 |

#### What You Can Manage 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

**Note:** In the Scheduling layer, filters and restrictions defined for User Type are not applied to the non-scheduled activities on a map.

#### 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.

### Perform 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.

Pre-requisites to Adjust Travel Time

This section provides the pre-requisite required to adjust travel time manually.

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.

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

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.

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>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>- Change your password</td>
</tr>
<tr>
<td>- Browse activity details</td>
<td>- View maps, directions, or map layers</td>
</tr>
<tr>
<td>- Edit activity details</td>
<td>- View calendars</td>
</tr>
<tr>
<td>- Set an activity to started/ completed/canceled/delayed/ suspended/not done</td>
<td>- Select a resource or change users</td>
</tr>
<tr>
<td></td>
<td>- Change options</td>
</tr>
<tr>
<td></td>
<td>- Manage activities not on today’s route</td>
</tr>
<tr>
<td></td>
<td>- Add a teamwork activity</td>
</tr>
<tr>
<td></td>
<td>- Reschedule an activity</td>
</tr>
<tr>
<td></td>
<td>- View nearby activities</td>
</tr>
</tbody>
</table>

**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 Oracle Field Service Mobility Cloud Service screen to access the Restore screen.
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.
Creating 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.
6 Mobility Cloud Multi-Day Activities

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.
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 Multi-Day Activities

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.
7 Mobility Cloud Maps

Overview of Maps

Oracle Field Service Cloud maps help you locate stops on your route by providing visual details and driving directions.

Related Topics

- About Work-Zone Shapes
- Custom Map Layers
- View Route Maps When You’re Offline
- View Activity Location on a Map
- View Directions to the Next Activity on Your Route

View the Traffic Layer

The traffic layer is available to users of Oracle Field Service Enterprise Cloud when Oracle Field Service Standard Map Cloud Service with Google Maps or Baidu Maps is part of your subscription.

The layer is available when using the Team or Route maps.

Team Map
Traffic information is displayed on the map when the Traffic option is selected on the layer switcher for the current date. Navigating to a past or future date makes the Traffic layer inactive. The Traffic option needs to be reenabled if you navigate away from the Map view to another screen.
**Note:** Traffic information will vary based on the map providers data availability which may not be available in all countries/areas/states/provinces/localities. Please check the map providers website for data availability. When traffic data is available, the system uses the most recent information available from the map provider which may not always be the current information.

---

### View Activity Location on a Map

Before starting an activity, it is possible to view a map of the customer address.

To view the location of an activity on the map:

1. Select the activity that you want to map from your home screen. The **Activity details** screen displays.
2. Click **Map**.
   
The map displays, with a green marker that indicates the location of the activity.
3. Click the marker to display the address.

---

### View Directions to the Next Activity on Your Route

When you complete an activity, you can view directions from your current location to the next activity.

**Note:** When you view directions for the first activity of the day, the start location that is set up for you in Oracle Field Service Cloud displays.

To view directions to the next activity on your route:

1. Click the next activity on your route from the home screen.
   
The **Activity details** screen displays.
2. Click **Directions**.
   
**Note:** Some customers may configure a navigation link plugin to launch a map application on a resource’s device. This allows for turn by turn directions from the current location, and includes voice.

A map displays directions from the previous activity (A) to the next activity (B). If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown.
Custom Map Layers

Map layers can display routes and resource locations, as well as demographic information such as population density, and the locations of gas stations, pipelines, and other geographical entities.
The following maps display custom map layers:

- Team
- Activity list
- Activity details

On the map, clicking the icon opens the list of all layers configured in the system. If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown.

Selecting a layer from the list adds the items contained in the layer to the map. You can select multiple layers to display their combined data. Deselecting a layer in the list removes its content from the map.

**Note:** Only the layers that are set as Active in Oracle Field Service Core Manage Cloud Service are available in Oracle Field Service Mobility Cloud Service.
View Route Maps When You're Offline

You can now view the map for a particular route even when your mobile is in offline mode.

With this new feature, you can:

- View the coordinates of the activities
- View the pre-loaded titles of the map (if map is opened and then the network connection is off)
- View the activity list
- View activity hints
- View custom map layers (if they were preloaded online)

Menu item ‘Map’ always active

The Map option, which appears in Activity List and Activity Details screen, will be active even in offline mode now.

Map title in offline mode

When you open the map and then your mobile goes to offline mode, the map displays preloaded titles of the map. If you open the map in offline mode, the whole map screen appears as a grid.

Map layers in offline mode

The map layer must be loaded before your mobile goes to offline mode. If not, you get a notification when selecting a layer that you are offline.
8 Mobility Unrouted Activities

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:

1. **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.

2. **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:

```markdown
Not ordered
1 Set first
2 After Lunch break
3 After Telephony Seasonal - 2808 SUNLAKE LOOP 212 - 327462481
4 After Multi-type Seasonal - 908 W CHARING CROSS CIR - 327466426
5 After HSD / High Speed Data install - 1965 DEERVIEW PL - 327504580
6 After Video T/C - 1810 LAKESHORE CIR - 327504520
7 After HSD Prewired / Reconnects - 402 TEMPLE DR - 32773754
8 Set last
```

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.
9 Mobility 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.

   The screen shows the inventory type, an includes options to deinstall or exchange the piece of equipment.

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 part number for which you want to search, for example, “200–10009”, and then click or tap **Search**. The inventory list 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 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.
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
10 Mobility Teamwork

Overview of Teamwork

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>
</table>
| Search for contacts | Do one of the following:  
  - Tap **Search Contact to Start a Conversation**  
  - Enter a contact’s name in the **Search** field |
| Start chatting with a contact | 1. Select a contact from your **Community** list.  
  2. Tap the contact’s name.  
  3. Type your chat in the text-entry field and tap **Return**. |
| End a conversation | 1. Tap the **Community** icon.  
  2. Tap **Leave Conversation**. |
| Invite a contact to chat | 1. Select the contact from your **Community** list.  
  2. Tap the **Community** icon.  
  3. Tap **Invite User**. |
| Display Community history | 1. Tap the **Community** icon.  
  2. Tap **History**. |
| See who’s working near your physical location | 1. Tap the **Community** icon.  
  2. Tap **Who’s Nearby**. |
| Display a contact’s information | 1. Select a contact.  
  2. Tap the **Community** icon.  
  3. Tap **User Info**. |
| Share your location with a contact | 1. Select a contact.  
  2. Tap the **Community** icon.  
  3. Tap **Share Location**.  
  **Note:** Tap **Modify** if you wish to change your location.  
  4. Tap **Return** to send your location. |
| Call a contact from your mobile device | 1. Select a contact.  
  2. Start a new conversation.  
  3. Tap the **Community** icon.  
  4. Tap the telephone icon to initiate the call. |
| Display a contact’s history | 1. Select a contact.  
  2. Start a new conversation.  
  3. Tap **History**. |
<table>
<thead>
<tr>
<th>To:</th>
<th>Do this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add or remove a contact from your</td>
<td>1. Select a contact.</td>
</tr>
<tr>
<td>address book</td>
<td>2. Start a new conversation.</td>
</tr>
<tr>
<td></td>
<td>3. Do one of the following:</td>
</tr>
<tr>
<td></td>
<td>o Tap <strong>Add From Address Book</strong></td>
</tr>
<tr>
<td></td>
<td>o Tap <strong>Remove From Address Book</strong></td>
</tr>
</tbody>
</table>

4. Enter a keyword and tap **Search**.
11 Ending Your Day

Before You End 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.

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 of Mobility

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**.
Chapter 12

12 Working with Time View in Mobility

About Time View in Mobility

Time view in Oracle Field Service Mobility Cloud Service enables you to manage and control the work of several resources at once, using a mobile device.

Time view is designed to delegate the responsibilities of a dispatcher, who generally works from the office using Oracle Field Service Core Manage Cloud Service, to a field manager, who works with other resources in the field and uses Oracle Field Service Mobility Cloud Service.

Similar to the that of a dispatcher, a field manager’s role is to monitor the activities resources (technicians), track possible jeopardy situations that might take place while on duty, and promptly contact the resources if it becomes necessary.

In time view, field managers can easily monitor routes and activities of several other mobile resources along with performing tasks of their own. Field managers can view the list of resources and their routes for several days, check resource status and work load, get information on shifts and work skills, and contact a specific resource or switch to that resource’s interface.

Understanding How to Access Time View in Mobility

To access time view in Oracle Field Service Mobility Cloud Service you must have at least two resources assigned to you as a user.

![Note:](image) Resources are assigned to a user in the Users screen in Oracle Field Service Core Manage Cloud Service.

If there are no groups in Oracle Field Service Mobility Cloud Service assigned to you as a user, you will be prompted to create a group after logging in to the application. You will be redirected to the Group Details screen with the corresponding notification displayed.

Click Create to start creating a group.

If you already have at least one group created, you will get directly to the time view screen after logging in.

Related Topics
- Configure Group Details

About the Time-View Area

The time view, or Manage area, allows a dispatcher or field manager to view all resources routes with their activities shown as color-coded blocks.
The functionality allows you to view routes for a single day, as well as access the multi-day view.

By default, the time view is scaled with the focus on the current time. However, you also can browse through different dates by scrolling across the screen. Or, alternatively, you can view multiple dates by pinching the screen on your mobile device to zoom in and out. Scrolling up and down allows you to view additional resources.

Essential time-view elements are shown in the following image:

1 Time indicator: The vertical red line indicates the current time. The time corresponds to the time zone specified in your user settings.

2 Date delimiter: Gray vertical dash lines specify the boundaries between the days.

3 Date indicator: For each day currently displayed in time view, a date indicator displays in the top-left of each day section. The date indicator is shown in the long-date format set for the user.

Ordered activities for each resource are represented as color-coded blocks on a resource’s route.

The length of the blocks is relative to activity duration (the longer the block, the longer the activity it represents). The activity label shown inside activity blocks is configured in the Activity time view label context in Oracle Field Service Core Manage Cloud Service.

The light blue blocks represent travel time to activities as well as the final travel time, if the travel time is foreseen.
The length of the blocks is relative to travel duration (the longer the block, the longer the travel time).

The white blocks in a route represent idle time of a resource with the idle time duration shown inside.

**Note:** Idle time is not always explicitly shown in time view. If its duration is less than the minimal preset value (Idle time minimal), the idle time will show as gaps in a route rather than distinct blocks. You can define the Idle time minimal on the Display screen in Oracle Field Service Core Manage Cloud Service.

The yellow arrows on the route indicate the time of route activation (a right-headed arrow or the first of the two consequent right-headed arrows), reactivation (the second of the two consequent right-headed arrows, if applicable), or deactivation (a left-headed arrow).

The white (not shaded) area represents the working time of a resource, while the shaded area indicates non-working time (for example, vacation or sickness).

Areas highlighted in pale yellow represent on-call shifts.

Tapping on the larger orange counter (4) displays a list of not-assigned activities grouped by buckets.

**Note:** This indicator counts only scheduled activities for today (both ordered and not ordered).
For each bucket in the list, the following information is presented:

- Bucket name
- Number of not assigned scheduled activities for today (in the top right)
- Total: the total number of not assigned activities (both scheduled and non-scheduled)

Tapping on the bucket name will take you to the activity list of the selected bucket. Alternatively, tapping anywhere outside the panel will close it.

Tapping on the numbered yellow counter (5) displays a list of not-ordered activities. Tapping the smaller orange counter (6) displays a list of non-scheduled activities.

### About the Time-View User Menu

The time-view user menu enables you to configure your user settings and to log out of Oracle Field Service Mobility Cloud Service.

Tap the menu icon in the top-left corner of the screen to access the menu.

The menu contains the following items:

- **Manage**: Displays the time view *(Manage screen)*
- **Maps**: Displays the locations of the resources
- **Calendars**: Displays all resource calendars
- **Resources**: Displays all the resources information

Tap the menu icon or anywhere outside to close the menu.

**Related Topics**

- Upload a Photo

### About the Time-View Resource List

The time-view resource list provides various details about the resources with which you are currently working.

Icons indicate the following about a given *resource*:

- If it is online
- If it is available for accepting a new task
- If there are any issues with his or her route

A pop-up resource hint displays additional resource details, as well as essential links.

The resource photo shows the user for which the current resource is set as the main resource.

**Note:** The user-resource relationship is configured with the *main resource* property in the Users section of Oracle Field Service Core Manage Cloud Service > Users.
Resource initials are displayed in place of a photo in case if:

- There is no user for which the current resource is set as the main resource
- There is no user photo available
- The user photo was not downloaded completely

If any resources have identical initials, predefined background colors are automatically selected to distinguish them from one another.

Resource name: Displayed next to the photo on the right. Resource name will be shown or hidden depending on the width of the screen.

Resource status in Oracle Field Service Collaboration Cloud Service: A yellow or green circle in the top left of the resource photo. Green indicates that the resource is online; yellow indicates that the resource is offline.

If a resource is not available in Oracle Field Service Cloud Collaboration there is no status indicator. This might occur in the following situations:

- The user to which the resource is assigned as the main resource does not have access to Oracle Field Service Collaboration Cloud Service
- The user to which the resource is assigned as the main resource is not included in your Oracle Field Service Collaboration Cloud Service user’s contact list
- The resource is not associated with any user. That is, no relationship has been set in the main resource property.

Note: The Oracle Field Service Collaboration Cloud Service indicator shows the current status of the resource, and is not dependent on the date selected when in the time view.

Resource’s route status and workload: A circle around the resource photo that indicates the resource’s status and workload. The color of the circle indicates the route status for the current day.

The route is not activated

The route is activated or reactivated

The route is deactivated

There are alerts in the route (regardless of route status)
The length of the circle indicates the resource's workload for the day. A complete circle indicates a 100% load, while no circle indicates that there are no regular activities assigned for the day. The workload indicator reflects only those activities within regular working time and does not factor in any workload within on-call shifts.

The workload indicator is subject to browser restrictions: for older browser versions which do not support Scalable Vector Graphics (SVG) image format, the workload indicator will not be shown. This restriction applies, for example, to Internet Explorer 8.

Note: Route status reflects the current state, and is not dependent on the date selected on Time View.

On-call indicator: A yellow telephone icon in the bottom right of the resource photo indicates that the resource is currently working on-call.

Using Real-time Data for Travel Time Estimation

Resources using OFSC Mobility or the Mobile application will have the travel time between activities updated using real-time traffic data from the configured map provider.

Note: The real-time update is available to users of Oracle Field Service Enterprise Cloud when Oracle Field Service Standard Map Cloud Service with Google Maps or Baidu Maps is part of your subscription.

The travel time between activities for the current days route are updated during one of the following actions:

- **Route Activation**
  
  When a resource activates their route from the Oracle Field Service Cloud Mobility app or the Core Application, the real-time travel data from the map data provider (for example, Google Maps) will be used to update the travel time between activities on the current days route. To use this option while activating the route, the following conditions must be satisfied:

  - Previous and Next activities include geo-coordinates that were provided by an external system and included with the activity creation.
  - ‘Calculate Travel’ parameter must be enabled for both the activities. To set this parameter, navigate to Configuration, Activity Types, Features.
  - Distance between the activities must be more than 1 km (0.62 miles).

- **Activity Completion**
  
  When an activity is completed using the Oracle Field Service Cloud Mobility app or the Core Application, the real-time travel data from the map data provider (for example Google Maps) will be used to update the travel time to next activity on the route. To use this option after completing the activity, the following conditions must be satisfied:

  - ‘Calculate Travel’ parameter must be enabled for the activity type of next activity in the Features section in the Activity Types page. To navigate to this page, click Configuration, select Activity Types.
  - Next activity has resolved coordinates that were provided during activity creation Distance from the current resource position to the next activity must be more than 1 km (0.62 miles). If the resource position is not gathered until the last minute, the coordinates of the current activity are used (if available).
If the 'Allow next activity selection on Complete' is enabled for the user where it is possible to select next activity on the route, the travel time to those activities will be updated with current, real-time conditions when another activity is selected.

**Note:** Traffic information will vary based on map providers data availability, which may not be available in all the countries/areas/states/provinces/localities. 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.

## About Resource Hints

Field managers can access resource hints that display the name of a **resource**, the available skills of that resource, and the current day’s working schedule.

Resource hints are available on all Oracle Field Service Mobility Cloud Service screens – **Manage, Maps, and Calendars**. Basic resource information displays when you click a resource’s name.

Icons on the hint enable you to access that resource’s route.

- route icon
- or resource-information

Any or all of the following properties display in the resource hint:

- ID (resource ID)
- Name (resource name)
- External ID (resource external ID)
- Status (resource status: active or inactive)
- Resource Type
- Time Zone
- Email Address (hint shows the resource’s email address as a link which, when tapped, creates an email using an external email application)
- Phone (hint shows the resource’s phone number as a link which, when tapped, makes a call via an external telephone application)
- Message Language
- Time Format
- Date Format
- Calendar (resource’s work shift)
• On-call Calendar (resource’s on-call shift)
• Work Skills (work skills and work skill groups assigned to the resource; if no work skills are assigned, the hint shows “All work skills”)
• Effective Work Skills (resource’s work skills and their ratios; work skill groups are not shown in this field, the work skills included in them are shown instead; if no work skills are assigned the hint shows “All work skills”)
• Work Zones
• Route Status (status of the resource’s route – activated, deactivated or reactivated – and date and time of the last status change)
• Reactivated (date and time of the resource’s route reactivation)
• Total (total number of activities assigned to the resource for the current day)
• Pending (number of pending activities assigned to the resource for the current day)
• Alerts (alerts associated with the resource or their route, and always shown at the top of the hint)

The following properties are never shown in the resource hint:
• Quota Management
• Routing Profile
• Capacity Categories
• Time Slots

If you wish to return to a resource’s route that you have already viewed, simply click your name in the upper-right corner of the screen and select the link from the drop-down list.

About Activity Hints

An activity hint displays a summary of information about an activity, including type, name, location, start and end times, and duration.

When you click or tap an activity on your route, an activity hint for that activity displays. For more detailed information, click or tap Details to access the Activity details screen.

If the activity has resolved coordinates, the hint contains the map showing the activity location.

To close the activity hint, click or tap the “X” or on the screen anywhere outside the hint.

About Activity Pools

Each resource has three activity pools – scheduled, non-scheduled, and not-ordered.

• A scheduled activity has a specific date and time. These activities are shown as color-coded bars representing activities of different statuses (1).

• A not-ordered activity has a specific date, but has no definitive place in the route. These activities are shown as a square with the number of not-ordered activities at the end of your working time (2).

• A non-scheduled activity has no definitive date and time.
These activities shown as a tab with the number of non-scheduled activities at the right edge of the screen (3).

You can optimize the processing of non-scheduled activities to improve your mobile app performance. Even if you have large number of non-scheduled activities on the route, only limited number is displayed when you log in to the mobile app. The maximum number of non-scheduled activities to be displayed is set in the 'Mobile activities count' field. To access more non-scheduled activities, you should click the 'View more' link and same limited number of activities configured in the "Mobile activities count' field will be added to the list. In offline mode, you will have access only to those non-scheduled activities that were downloaded to your mobile device before your mobile was offline. 'View more' link is disabled in offline.

When any of your activities in the not-ordered pool has an alert, the pool-symbol color changes to red.

To view the list of activities within a pool, click or tap that pool symbol. The list header displays the type of activities it contains (non-scheduled or not-ordered), the number of such activities, and the date (for not-ordered activities)

To display the hint for an activity in the list, click or tap that activity.

To close the activity list, click or tap the activity header or on the screen anywhere outside the hint.

About Moving Activities

You can move activities between pools of the same resource, within the route of a resource, and between resources.

To move an activity, click or tap and hold it and then drag it to the new destination. When you drag the activity, all possible destinations are outlined with dotted lines and the destination you select is highlighted in green.

If your activity move violates any constraints for itself or for other activities, a warning window displays and you will be asked to confirm the move.

To close the confirmation window or abort the move, click Don't Move or tap the “X”.

The system still allows you to move the activities despite the warnings. Click Move to proceed with the move or Do Not Move to abort it.
About 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.

**Related Topics**

- About Updating a Resource’s Calendar
About Defining Resource Lists and Groups

A resource list can contain all resources available to a user based on their visibility settings, or it can be filtered to include only those with a specific skill or geographic location. A group is composed of a configurable pool of filtered resources.

There are two ways to define resource lists:

- Manually selecting resources to add to a resource list
- Configuring a filter and applying it to the selected resources. This is an optional feature that can be used in tandem with manual selection.

Selected resources are placed into groups. Each time you log in to Oracle Field Service Cloud Mobility, you will work with one selected group of resources that displays in the resource list on the time-view screen. The name of the selected group appears as the header on top of the list. Resources are sorted alphabetically by name and by their resource ID (PID). In the case of longer resource lists that do not fit on the screen, a vertical scroll bar will help you navigate up and down the list.

Depending on the filters selected for the group and the date(s) specified in time view, the number of resources in the resource list may vary:

- If there is only one group created for your user, this group is displayed.
- If there are multiple groups, the group that displays is either the last selected group or the first group in the group list, whichever is applicable.

You can switch to a different group if there are multiple groups available. Simply tap on the group header (the group name) to open the Groups window, and then select the group to which you want to switch.

In the image, the group with a blue check mark is the one currently selected.

Tapping any group name on the list selects group and closes the Groups window. The time-view screen updates to reflect the resource routes in the group you have chosen.

To hide the group list, tap anywhere outside the group-list window.

Related Topics

- About Managing Groups

About Managing Groups

You can create a new group, change a group’s details, or delete a group.

You can perform almost all group-management tasks from the Groups window.

- Click or tap on the group header (the group name) to open the Groups window.
- Click or tap the pencil icon in the top right of the Groups window to switch to the editing mode:
  - Click or tap the plus sign in the top right to add a new group by tapping the plus sign.
  - Click or tap the pencil icon associated with the group name to update an existing group.
Click or tap the minus sign associated with the group name to delete a group.

Click or tap the left angle bracket in the upper left to exit editing mode. Tap anywhere outside the window to close the Groups window.

**Related Topics**
- Create a Group
- Configure Group Details
- Update Group Details
- Delete a Group

**About Creating Groups**

As a user, you can create one or more groups from any resources available to you, subject to your visibility settings.

Groups are arranged alphabetically, and are configured in the Group Details screen. Depending on the workflow, you can access the screen in one of the two ways:

- If you haven’t already created any groups, you’ll be automatically redirected to the Group Details screen when you log in to Oracle Field Service Mobility Cloud Service.
- If you already have at least one existing group, you can create a group by adding it to the existing group list.

**Note:** You can add a maximum of 50 resources to a single group. When creating a new group from a bucket/group, only the first 50 resources will be added to that group.

**Related Topics**
- Create a Group
- Update Group Details

**Create a Group**

You can create a group from any resources available to you, subject to your visibility settings.

1. Click or tap on the group name in the resource list to open the Groups window in time view.
2. Click or tap the plus sign in the top right of the Groups window to switch to the editing mode.
3. Click or tap the pencil icon in the top right to open the Group Details screen.

**Related Topics**
- Configure Group Details
Configure Group Details

You can configure details of a *group* using the **Group Details** screen.

1. Enter a group name.
2. Select a filter that will apply to the group.
   
   The filter will be used when displaying the members of the group in time view.

   **Note:** Go to Configuration > Filters in Oracle Field Service Core Manage Cloud Service to configure the filters that appear in the Filter drop-down list. You must make these filters applicable for the *resource* entity, and enable the List/Time/Map/Daily check box.

3. Click or tap **Edit** in the **Group Members** section to browse the **Resource Tree** and add resources to the group.

   , while individual resources are shown by their photos or initials.

4. Select the desired check boxes to add those resources to the group.

   You can add both group resources and individual resources to the group. When adding a group resource, however, please note that the group resource is a dynamic entity. This means that the child resources within such group resource may change over time, and these changes will naturally reflect in your group content. Therefore, if you want to secure specific resources in your managed group, opt for assigning those resources individually. Selecting a group resource automatically selects all the resources it contains.

5. Click or tap **Done** to preview your selections. Click or tap **Edit** if you wish to make more modifications.
6. Click or tap **Submit** to save the new group, or **Discard** to delete your changes.

Delete a Group

You can delete any *group* from the list of groups

If you delete either the last group or the only group in the list, you will be redirected to the **Group Details** screen to create a new group. If you delete the currently selected group, you will be redirected to the next group in the group list.

1. Click or tap on the group name in the **resource** list in time view to open the **Groups** window.
2. Click or tap the pencil icon in the top right of the **Groups** window to switch to the editing mode.
3. Click or tap the minus sign next to the group you wish to delete.
4. Do one of the following:
   
   o Click or tap **Delete** to confirm deletion.
   o Click or tap the left angle bracket in the top left to cancel.
Update Group Details

You can update information about an existing group.

1. Tap on the group name in the resource list in time view to open the **Groups** window.
2. Tap on the group name in the resource list in time view to open the **Groups** window.
3. Tap the pencil icon next to the name of the group to which you want to make changes.
   The **Group Details** window opens with all fields pre-populated with existing information.
4. Make your edits.
5. Do one of the following:
   - Tap **Submit** to apply your changes and return to time view.
   - Tap **Dismiss** to discard the changes and return to time view.

Upload a Photo

Resources can upload a personal photo to use on the home screen. Field Manager can not upload or modify field resources photo at this place.

1. Do one of the following to access the **User options** screen:
   - (Field Manager) In time view, select a resource, click
     
     ![Field Manager](image)
   - (Resource) From your home screen, click **Options**.
2. Tap **Browse** to browse to and select the photo you want to upload.
   After you select the photo, it displays on the **User options** screen in the editing mode.
3. Drag the edges of the round crop tool to resize and move the area of the photo that you want to select.

4. Tap **Apply** to preview the cropped photo.

5. Do one of the following:
   - Tap **Submit** to save the photo.
   - Tap **Edit** to return to editing mode and make additional changes.
   - Tap **Dismiss** to discard your changes and return to either time view or the **Activity List** screen.
13 Managing Resources

About Managing Resources

Field managers can manage the resources under their supervision by monitoring their routes and progress, and by viewing and editing a resource’s information.

The following resource information is available to view and edit:

- **Important:** Edit functionality is available only if permissions have been configured to allow it.
  - Resource information (including ID, phone, number, email address, and status)
  - Resource calendars
  - Work zones
  - Work skills
  - Locations

- **Note:** A user must be associated with more than one resource in order to access any resource data. If associated with only one resource, a user will immediately access his or her route and its normal actions.

The Manage (time view) screen displays the resources in the selected group. Resources are listed alphabetically, together with their routes, and the activities in the routes are displayed as bars that are colored-coded according to their status. Travel time, idle time, and their duration, are also shown.

The Maps option displays a map showing routes, positions, and locations of all resources in the group, as well as activities not assigned to any resource, and resources nearby.

The Calendars option displays a screen showing an overview of all resources’ calendars. (This is similar to the Daily screen in Oracle Field Service Core Manage Cloud Service.) Information about working, non-working, and on-call time assigned to the resources is available.

The Resources screen displays the list of resources in hierarchical order, their photos or initials, email addresses, external ID’s, etc. You can use the filter criteria present on the screen like Resource Types, Status, etc. to view the resources.
Related Topics

- About Resource Information
- About Editing Resource Information
- About Changing Resource Locations
- About Resource Calendars
- About Updating a Resource’s Calendar
- About Updating Resource Work Skills
- About Updating Resource Work Zones
- About Team Maps

About Resource Information

The Resource Info screen is a dashboard for field managers that displays an overview of a resource’s data, and allows them to edit any of the information listed.

When you click

in the resource hint on your web browser, the Resource Info screen displays. This figure shows the Resource Info screen that contains general information about a resource.
The screen contains the following blocks of information:

- **General information** (includes basic information about the resource, such as name, photo, e-mail address, and phone number)
- **Additional information** (includes time zone, time format, and date format)
- **Locations** (contains the list of locations assigned to the resource)
- **Resource Calendar** (shows the resource’s work schedule for the month) — Working days in blue, Non-working days have white background color, Workload (a dot is displayed for the date if there is any other activity except mass-repeating activity), On-call icon to indicate there is a on-call shift for the selected date. If no working calendar has been specified for the selected resource, shift information is calculated according to the parent resource calendars or default company calendars, and the calendar can be shifted one month earlier or later by tapping the left or right arrow).
- **Work skills** (includes a resource’s work-related skills and their level of expertise with those skills)
- **Work zones** (contains the work zones assigned to the resource; work zones assigned for the current day are color-coded)

**Note:** The data blocks that display on the **Resource Info** screen correspond to the resource settings that are configured in Oracle Field Service Core Manage Cloud Service. For example, if no locations or work skills have been defined for a resource, the **Locations** and **Work Skills** blocks will be hidden.

You can edit the information that displays in each block on the screen by tapping or clicking the block’s title to access a number of dialog boxes.

Click **Manage** in the top-left of the **Resource Info** screen to return to the **Manage** screen.

You can search for a resource using Name or External ID in the **Group Details** screen. Search is performed within the sub-tree you were looking at before starting the search.

1. Click or tap on a group name in the Manage section.
2. Click or tap the pencil icon in the top-right corner of the Groups section.
3. To open the **Group Details** screen, click or tap the pencil icon present next to the Group name.
4. In the **Group Details** screen, enter at least two characters in the Search text box present at the top-right corner of the screen. The search results are displayed in alphabetical order.

The following information is displayed for each resource:

- Resource’s Photo or Initials
- Resource’s Name
- Resource’s External ID

**Note:** If the search results exceed 50 matches, only the first 50 results are shown with a note at the end of the list suggesting that the search should be refined. For example, “50 of 72 found resources are shown. Please refine your search.” If two users are linked only by teamwork and do not have any association with each other, then the users will not have access to each other’s resource information. Also, when a supervisor user switches to the team holder’s queue through Assists to option, the Resource Info option is not available.

**Favorite Resources**

When you create the Favorites group in the Oracle Field Service Core Manage Cloud Service interface, it is automatically created and displayed in under the Supervisor view.

The Favorites group:

- Has a star next to it
- Is part of other managed groups
- Has the same characteristics as a managed group
- Has the same resources in both the interfaces

Other characteristics:

- If you add a new resource to Favorites in , it appears in Oracle Field Service Core Manage Cloud Service. The reverse is also true.
- If you remove a resource from Favorites in , it is removed in Oracle Field Service Core Manage Cloud Service as well. Or, if you remove the Favorites group in , the Favorites group and all its resources are removed in Oracle Field Service Core Manage Cloud Service as well. The reverse is also true.
- You can rename the Favorites group in and the group still displays the star and behaves as a Favorites group.

**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.

### About Viewing List of Resources

You can view the list of resources on the Resources screen.

The screen lists resources in hierarchical order, their associated organizational unit or bucket, photos or initials. In addition up to six properties are displayed based on the order defined in the Mobility – Resource Info context layout. You can use the pre-defined filters like Organization, Org Unit, Resource Types, and Status to find resources. The number present next to the filters indicate the resources that are available for the filter criteria.

You can search for a resource using the search box, which narrows the list but does not change the filter criteria.

### Add a Resource

You can add a resource from the Resources screen.

1. Select the Resources option from the menu.
2. Click the **+** icon present on the top-right corner of the screen.
3. In the New Resource Info page, provide the following mandatory information:
   - Name of the resource
Resource type — Select the type of resource from drop-down list.
User type — Select the User Type from the drop-down list.
Time zone — Select a time zone with which the resource will be associated with
Time format — 12 hr format or 24 hr format
Date format — Choose one format
Long Date format - Choose one format
Login – Enter the login the resource will use to access the system
Password – Enter the password the resource will use to access the system
Message Language - Select a language from the drop-down list
OrgUnit – Select the Organizational Unit where the resource should be added

4. Click Submit. A new resource and user will be added.

**Note:** In order to add a new resource, the following fields should be configured with a read-write visibility in the Mobility – Resource Info context:
- Name (pname)
- Time zone (time_zone)
- User Type (user_type_id)
- Resource type (ptype)
- Time format (ptime_fid)
- Date format (pdate_fid)
- Long Date Format (sulong_date_fid)
- Login (ulogin)
- Password (password)
- Message Language (planguage)

### About Editing Resource Information

A field manager can review and revise a resource’s employee information, as well as information about work skills, work zones, work locations, and calendars.

From the **Resource Info** screen, tapping or clicking the title in any of the information blocks displays dialog boxes in which you can add, change, or delete information specific to that block. Alternatively, you can use the Action menu to edit the resource information and also perform other activities.
Note: The information that actually displays will depend on what has been configured for your environment. If two users are linked only by teamwork and do not have any association with each other, then the users will not have access to each other’s resource information.

<table>
<thead>
<tr>
<th>Information block:</th>
<th>Information you can view and edit:</th>
<th>Associated screens and/or dialog box(es):</th>
</tr>
</thead>
</table>
| General information (name of the resource) | • Name  
• External ID  
• Phone  
• Email address  
• Status (active or inactive)  
• Resource type  
• Message language  
• Time zone  
• Time format (12- or 24-hour)  
• Date format | Screen  
• Edit Resource Info |
| Additional information | • Name  
• External ID  
• Phone  
• Email address  
• Status (active or inactive)  
• Resource type | Screen  
• Edit Resource Info |
### Information block:

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<tr>
<th>Information you can view and edit:</th>
<th>Associated screens and/or dialog box(es):</th>
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<td>• Message language</td>
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<td>• Locations</td>
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<td>Dialog box</td>
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<td>◦ Home</td>
<td>• Daily Locations</td>
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<td>◦ Days</td>
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<td>Screen</td>
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<td>• Start</td>
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<td>Resource Calendar</td>
<td>Screen</td>
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<td>• Shift</td>
<td>• Resource Calendar</td>
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<td>◦ Overnight</td>
<td>Dialog box</td>
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<td>◦ First</td>
<td>• Add Location</td>
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<td>◦ Second</td>
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<td>◦ Non-working time</td>
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<td>◦ Custom working time</td>
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<td>• Number of repeating days</td>
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<td>• Reason for non-working time</td>
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<td>• Time frame for custom working time</td>
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Information block:
- Points assigned to custom working time

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<th>Information you can view and edit:</th>
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<td>Work Zones</td>
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<td>• Work Zones</td>
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<td>Dialog boxes</td>
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<td>• Add Work Zones</td>
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<td>• Edit Work Zone</td>
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Related Topics
- About Changing Resource Locations
- About Updating a Resource’s Calendar
- About Updating Resource Work Skills
- About Updating Resource Work Zones

About Changing Resource Locations

A field manager can change a resource’s default start, end, and home locations, and add new locations to existing ones.

To edit the resource location, the field manager can click or tap the Locations link from the Resource Info screen. Alternatively, the field manager can use the Action menu from the Resource Info screen to access the resource location.

The field manager can perform the following tasks on the Locations screen:
- Click or tap the pencil icon to add the start, end, and home locations for specific days or for an entire week
- Click or tap a day of the week to specify location assignments for that day
- Click or tap the plus sign to add new locations to an existing list of locations
- View shared locations (cannot be edited)
Change a Resource’s Location Temporarily

You can define the start and end locations and the home zone center, for a week day and for any date. The locations for the selected dates are used in all types of routing including bulk, immediate, and urgent routing, and for calculating resource queues as well.

1. Click the hamburger menu and click Resources.
2. Select the resource for which want to update the location.
3. Click the Locations tile.
4. Go to the Override Daily Locations section.
5. To add an override, click the plus icon.
   The Override Daily Location dialog appears.
6. Select the start location, end location, and home location.
7. Select the date for which you want to override.
   You can select any date in the future for up to 1085 days.
8. Click Submit.
   An override is added for the selected date. Temporary locations older than 90 days are deleted automatically.
9. To cancel an override, click the minus icon.

About Updating a Resource’s Calendar

If necessary, a field manager can update the calendar of any resource in the group.

To edit the resource calendar, the field manager can click or tap the Resource Calendar link from the Resource Info screen. Alternatively, the field manager can use the Action menu from the Resource Info screen to access the resource calendar. The field manager can perform the following tasks on the Resource Calendar screen:

- Click or tap in any calendar cell to open the editing dialog box

  Note: When no calendar has been set, the fields in the dialog box are blank.

- Select a shift and the number of days for which that shift applies
- Indicate if the shift is regular or on-call:
  - Regular/On-call button (toggles between the two options and indicates if the resource’s working calendar is regular or on-call; always displays the non-selected value)
  - Regular/On-call drop-down list (contains all shifts of the selected type created for the company; when any shift is selected, the Regular/On-call button is disabled, meaning that you cannot set the other calendar type without saving or dismissing your current selection)

  Note: A telephone icon in a calendar cell indicates an on-call shift. Once created, an on-call shift cannot be deleted. You can, however, change it to a non-working or custom shift.

- Select the number of days for which the calendar is applicable (the default value is “1”)
- Specify the reason for a non-working time; for example, holiday, vacation, illness, and so on
• Set the custom working time, start and end times for the custom calendar, and the number of points that correspond to it (if points are not used, the field does not display)

Any updates you make to a resource’s calendar that result in a change in the working-time duration also updates the total figure in the header.

Related Topics
• About Resource Calendars

About Updating Resource Work Skills

A field manager can add and assign a work skill to a resource, and specify a level of expertise for that skill.

To update the resource work skills, the field manager can click or tap the Work Skills link from the Resource Info screen. Alternatively, the field manager can use the Action menu from the Resource Info screen to edit the resource work skills. The field managers can perform the following tasks on Resource Work Skills screen:

• Click or tap the plus sign to select one or more new work skills and add them to a resource’s list of skills
• Drag the slider to indicate the level of expertise (ratio) the resource has with the new work skill
• Indicate whether the new work skill is temporary or permanent
• Click or tap the work skill name or ratio bar and drag the slider to change the level of expertise for an existing work skill
• Click or tap the minus sign to delete an existing work skill

About Updating Resource Work Zones

A field manager can assign specific work zones to a resource.

To update the resource work zones, the field manager can click or tap the Work Zones link from the Resource Info screen. Alternatively, the field manager can use the Action menu from the Resource Info screen to edit the resources work zones. The field manager can perform the following tasks on Resource Work Zones screen:

• Click or tap the plus sign to select one or more work zones from a predefined list and add them to a resource’s list of work zones
• Specify work zone details:
  o Drag the slider to adjust the probability (ratio) of a resource being assigned activities in a work zone
  o Indicate whether the new work zone is temporary or permanent
  o Select a start date
  o Select an end date
  o Indicate if the work zone occurs daily or weekly
  o Specify the number of days between occurrences
• From the Resource Work Zones screen, click or tap a percentage to adjust the probability slider
• Click or tap the minus sign to delete an existing work zone
Related Topics

• About Work-Zone Shapes

About Work-Zone Shapes

When any work zones are assigned to a resource, their shapes are displayed in the Work Zones block of the field manager’s Resource Info screen.

A work zone is the defined geographical area within which a resource can perform activities. Work-zone shapes serve as visual representations of work zones on the map, and as a tool for yet more subtle definition of work zones. For example, if a company chooses to define its work zones by city names or postal codes, the work zones may be rather large. You also can divide a work zone into smaller geographic areas by attaching several shapes to it, allowing two teams to work in one work zone – one team in one “shape”, and a second team in another.

You use the Work Zones configuration feature in Oracle Field Service Core Manage Cloud Service to define work-zone shapes by entering the identifiers – usually ZIP codes associated with a particular work zone – into the Work Zone Shapes field on the Edit work zone window.

Once configured, work-zone shapes display on the Resource Info screen in Oracle Field Service Mobility Cloud Service.

Note: Blue indicates that a work zone is active; grey indicates that it is inactive.

About Team Maps

Team maps display routes, positions, and locations of all resources in the group.

Clicking Maps on the Manage screen displays the team map.
The following data displays on the map:

- Resources’ routes
- Resources’ current locations
- Start and end point of each resource displayed only when you select each resource separately.

Note: A group map does not show the start and end points.

- Home zone of each resource
- Map layers (for example, the locations of gas stations and pipelines). If the Google maps service is enabled at the time of setting up the instance, the satellite view layer icon is shown.

Each team map has the following characteristics:

- Each activity is marked with the color corresponding to the activity status
- The status color codes are the same as those used to mark activities in the resources’ routes
- Each activity is marked with the color corresponding to the activity status
- Routes are shown as differently colored lines, each representing a particular resource
- Activities belonging to a route have borders of the same color as the route, making it easier for the user to identify activities of the same route
- Clicking an activity marker opens the hint with the activity details
- Clicking Details displays the Activity details screen of the corresponding activity
- Clicking a resource marker opens a resource hint

You also can display a map showing only the resources’ locations. To do this, click the Layer icon in the lower-left corner and ensure that only the Resource layer is checked.

In addition, clicking an activity on the Manage screen displays a hint that includes a thumbnail map of corresponding resource’s current location.

Related Topics

- Custom Map Layers
- View Activity Location on a Map
# 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>
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<tr>
<td>February 2019</td>
<td>The following topics are added:</td>
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<td>• The Calendar Panel</td>
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<td>• Disable Personal Activity Tracking</td>
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<td>• About Selecting an Activity to Start</td>
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<td></td>
<td>The following topics are updated:</td>
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<td>• Using Real-time Data for Travel Time Estimation</td>
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<td>• About Viewing the Traffic Layer</td>
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<td>• Working with Non-Travel Activities</td>
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<td>December 2017</td>
<td>• About Route Map Offline Availability</td>
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<td>• Assign or Schedule Activities</td>
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<td>• Using Your Own Navigation App to Get Driving Directions</td>
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