Oracle Field Service Cloud
Using Collaboration Cloud Service
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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.

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About Collaboration

Collaboration is a workforce management application. Use the Collaboration Messaging Framework to establish business-to-business message exchanging capabilities.

Collaboration enables communication between the application users and to organize help desk activities. Chat window of the Collaboration feature lets you to instantly access other data from the application, instead of using the Manage interface. For example, you can share details about a resource, an activity, or an inventory item or you can move activities and inventory.

Using collaboration you can perform the following high-level tasks on a day-to-day basis:

- Communicate with the other users
- Share details of a resource, activity, or inventory item with another user
- Move the activities or inventory items
- Find the nearby resources
- Manage the customer information and business relationships

About Collaboration Privileges

A privilege is a discrete right that is granted to view and perform a collaboration operation that would otherwise be prohibited by the Oracle Field Service Cloud.

Collaboration setup involves defining configuration privileges to manage user information and activities. Access to the functionality and data is secured using the role-based access control. In a role-based access control model, users are assigned with roles or user types, and each user type is assigned with the access privileges to perform the operations.

**Note:** Contact the OFSC support/admin team to get the User-Resource Association privileges to enable the activity reassignment or inventory transfer. These permissions are assigned on client’s request at a configuration level.

User-Resource Association privileges: In Collaboration, a one-to-one association is defined between the User and the Resource. For example, when you assign an activity to a resource, the community user associated with the resource performs the task. Contact your system administrator to get one-to-one privileges to:

- Start a conversation with a user from the resource/activity hint
- Reassign activities
- Transfer inventory to the Resource via Collaboration
- Broadcast activities and group messages
Reassignment/Transfer privileges: An activity can be reassigned only if a user has the privileges to transfer. You cannot reassign the activities unless you have permission to move the activities in the list view of the Activities page. You also need the Allow Activity Move Between Resources permission to broadcast the activities.

⚠️ **Note:** Admin or field manager needs to enable Track geo location for a resource type in the mobile interface to use Oracle Field Service Cloud Location.

**Related Topics**

- Enable Collaboration Permissions
2 Configuring Collaboration

Set Up Collaboration for the First Time

First time users needs to complete the tasks in the following list, and familiarize yourself with different user interfaces and basic navigation. The structure of this guide speeds up your implementation by providing a direct link to each core setup task.

Use the following procedure to access the setup tasks, subject to your privileges:

- Rules to setup: Check the rules to setup collaboration. See Rules to Setup Collaboration for details.
- Configure groups and helpdesks: You need to create user groups and helpdesk groups, based on your business requirement and privilege levels. See Configure User Groups and Helpdesks for details.
- Add users to the groups: You can assign users to a user group or helpdesk. See Assign Users to the Collaboration Group for details.
- Enable permissions: You need enable collaboration access permission to the user type. See Enable Collaboration Permissions for details.

Related Topics
- Set Up Collaboration Tutorial

Rules to Setup Collaboration

Setup visibility permissions in the system to access Collaboration. These settings allow the authorized administrators and helpdesk to allocate users to various groups and control permissions for them.

Visibility configuration —The three key entities associated with Collaboration visibility configuration are:

- User: Same as the user defined in the system.
- User Group: Group of users with similar collaboration visibility.
- Helpdesk: Collection of users or user groups who are helpdesk operators.

Rules to setup Collaboration:

- Visibility can be defined between a source entity and a target entity. The source can be a User group and target can be either a User Group or a Helpdesk; this is a symmetrical relationship.
- A user is automatically marked ‘Admin’ when the Collaboration and the visibility Permissions menu is enabled for that user type. All the admin users can configure permissions for the resources.
- Admin can configure only the users under the resource tree entries they have access to.
- By default, a newly added user from a different group cannot collaborate with anyone.
- When you add new user to the system, setup a user group for that user to enable collaboration.
- User can collaborate only with the users within the same group/bucket and with the users of other user groups whose visibility setting is configured.
• Users added to a Helpdesk can see each other by default. They can also perform Helpdesk related operations like transfer, chat etc.

Related Topics
• Set Up Collaboration Tutorial

Configure User Groups and Helpdesks

As a user, you can create user groups and helpdesk groups from any resources available to you, subject to your visibility settings. You can select both individual and group resources to your group and apply one of the predefined filters, if needed.

Configure the user groups and helpdesk users in the Collaboration screen. Based on your permissions, you can create, edit and delete a group. You can also map the users against each helpdesk and user group. Only the selected helpdesk and user groups will have visibility to the group created.

1. Click Configurations > Subsystems And Integrations > Collaboration.
   The Collaboration page opens.

2. Click add icon to create a user group/helpdesk.
   The New Group page opens.

3. Configure the following values:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the name of the group</td>
</tr>
<tr>
<td>Type</td>
<td>Select the type of the collaboration group:</td>
</tr>
<tr>
<td></td>
<td>◦ Group: Denotes the user group</td>
</tr>
<tr>
<td></td>
<td>◦ Helpdesk: Denotes a group of service and support providers to the users</td>
</tr>
<tr>
<td>Active</td>
<td>Denotes if the group is active. Unselect the Active check box to make a group inactive.</td>
</tr>
<tr>
<td>Groups to collaborate with</td>
<td>Add other groups to have visibility to this group.</td>
</tr>
<tr>
<td>Assisting Helpdesks</td>
<td>Add other helpdesk groups to have visibility to this group.</td>
</tr>
</tbody>
</table>

4. Click Save.
   The group is created.

5. Add users to the group created from Settings > Users.
   Available users appear. You can add single user or multiple users at a time.

Related Topics
• Assign Users to the Collaboration Group
• Set Up Collaboration Tutorial
Assign Users to the Collaboration Group

Add one or more users to multiple helpdesks and collaboration groups. You can also delete selected users from a group.

You can only add a single user at a time in case you are creating a new user. In case of existing users, you can add multiple users to multiple groups simultaneously. To assign users to the Collaboration group:

1. Click Settings > Users.
   The Users page opens.

2. Do one of the following:
   - To add existing users: Click a bucket from the left-hand side panel, select the user ID check boxes.
   - To add new user: For the selected bucket, click Add New and enter the user details to save the user.

3. From the Users page, select the ID check boxes of the users.

4. Click Edit Collaboration User Group in the header.

5. Select the Collaboration Group or Operator of Help Desk.

6. Click OK.
   A Confirm message pop-up opens asking if you wish to proceed.

7. Click OK.
   The users are assigned to the collaboration group.

Related Topics

- Set Up Collaboration Tutorial

Enable Collaboration Permissions

Users can access Collaboration only when the collaboration permissions are configured against each user type. Configuration includes enabling permissions to transfer the activities, inventory and image sharing via chat.

Only Administrator or your filed manager can enable collaboration permissions for you.

1. Click Configuration > User Types.
   The User Types page opens.

2. Under the General tab, select the appropriate Collaboration Permissions against each user type:

<table>
<thead>
<tr>
<th>Click</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow inventory move Via chat</td>
<td>Share and transfer inventory</td>
</tr>
<tr>
<td>Allow activity move Via chat</td>
<td>Share activities</td>
</tr>
<tr>
<td>Allow image sharing Via chat</td>
<td>Share images through the chat window</td>
</tr>
</tbody>
</table>

3. Click Save.
The collaboration permissions are enabled.

Related Topics

- Set Up Collaboration Tutorial

Troubleshooting Configurations

These common problems can be easily corrected with a change to your configuration settings. Check the suggested solution or contact Oracle support for more help.

<table>
<thead>
<tr>
<th>Problem</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>The <strong>Start Conversation</strong> link does not display in the <strong>Hints</strong> box.</td>
<td>The <strong>Start Conversation</strong> action must be added to the <strong>Hint</strong> context. You may need to define the association between the resource and the hint.</td>
</tr>
<tr>
<td>Details about the moved or shared item do not appear in the <strong>chat</strong> window.</td>
<td>Click <strong>Expand</strong> in the upper right corner of the message. That will give you the space you need to view the details. The fields in Manage view that contain this information could also be empty. Contact Oracle support to help you define the details in the <strong>Resource details in chat</strong>, <strong>Activity details in chat</strong>, or <strong>Inventory details in chat</strong> context.</td>
</tr>
<tr>
<td>The activity icon does not have a name next to it in the <strong>chat</strong> window.</td>
<td>The <strong>identify activity context</strong> has not yet been defined.</td>
</tr>
<tr>
<td>The inventory icon does not have a name next to it in the <strong>chat</strong> window.</td>
<td>The <strong>Identify equipment by context</strong> has not yet been defined.</td>
</tr>
<tr>
<td>Cannot move inventory items</td>
<td>The <strong>OFSC Location</strong> has not yet been activated. See the Oracle Field Service Cloud Location User Guide for instructions.</td>
</tr>
</tbody>
</table>

Related Topics

- Set Up Collaboration Tutorial
3 Getting acquainted with the Collaboration UI

Collaboration Components

Collaboration is designed to delegate activities of a dispatcher to the field manager who works with resources in the field using the manage and mobile interfaces. The collaboration components allow effective communication to delegate assignments and helpdesk requests to the resources.

You can chat with the other users and helpdesk using these components:

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
</table>
| Collaboration | Collaboration provides a simple interface for the team members to:  
• Communicate about the activities and equipment  
• Share the details stored in the Field Service Cloud application  
• Transfer the activities and inventory  
• Locate the nearby resources in case of Mobile users |
| Helpdesk | This feature lets you to:  
• Route the helpdesk requests to the agents  
• Transfer a conversation from an agent to another agent |

Both Community and Helpdesk features use the resources, activities, and inventory information available in the Field Service Cloud application. Enable Smart Location to manage location and find the nearby resources.

Note: Collaboration does not work in the mobile interface, if the device is offline. Helpdesk features such as the ability to take chat, and transfer conversation are not available in mobility. However, if a mobility user is configured properly, can view helpdesk operators based on their privileges and can post messages to the helpdesks.

Related Topics
• Use Collaboration Tutorial

About Collaboration Window

Collaboration window is the main window that appears when you start working with the Collaboration feature.
The structure of the **Collaboration** window is identical both in the Manage and Mobility applications. The **Collaboration** window consists of:

- A list of active chats and broadcasted messages
- A list of helpdesks added to your Address Book
- A list of contacts of other Collaboration users

**Note:** The Address Book displays the contacts you have saved.

- Collaboration Alert Message: If you use collaboration as a delivery channel in the message scenario, then the alerts from message scenario are displayed as message alerts in the collaboration window with the following properties:
  - All message alerts are grouped under the System Message collaboration window.
  - The user-defined content in the **Subject** and **Body** fields of the **Patterns** tab displays as a message alert in the collaboration window. If no content is specified in the subject and body fields of the **Patterns** tab, then a blank message alert displays.
  - The message alerts are read-only and there is no option to reply to the message alerts.
  - The message alerts are available in the chat history if you remove the message alert from the collaboration window using the **Leave Message** option.

The **Address Book** section separates the chats with the contacts. If there is no data available in the system (e.g., if there are no chats going on, or you have no contacts in the address book), a message appears prompting you to search for the contacts.

**Related Topics**

- Use Collaboration Tutorial
About Chat List

Using collaboration, you can send and receive real-time messages. All these active one-to-one, conference chats and the helpdesks requests appear in the **Collaboration** window.

All the conversations are displayed in the order they are received. In both Manage and Mobility applications, you will see the chat list with:

- The details of the conference
- The broadcasted message you initiated or received
- The name of the second chat participant
- The name of the helpdesk you have sent your request to
- The last message of the conversation
- A left-pointed arrow next to the chat thread, if you have sent a message
- An empty grey colored message-number box, if you have sent the last message in the conversation
- The red colored unacknowledged message-number box, if another user/helpdesk operator sent the last message in the conversation
- The time in black color, if the message is unacknowledged and is within the threshold time
- The time in red color, if the message is unacknowledged and crosses the threshold time
Related Topics

- Use Collaboration Tutorial

About Address Book

Address book contains a list of contacts and helpdesks. You can find the contacts under Address Book in Manage while, in the Mobility application contacts are located beneath the chat list.

Helpdesk: The helpdesk is displayed in the alphabetical order and is represented with:

- HelpDesk is online
: When a user selects the Help desk for a Help desk chat and if at least one of the helpdesk operators is online, the Chat Status icon displays as online. The helpdesk chat always shows online in the Contact or Search list.

- **Help Desk is Away**

: When a user selects the Help desk for a Help desk chat and if all the help desk operators are away, the Chat Status icon displays as Away.

- **Help Desk Operator is away**

: When a operator turns off from a help desk, the status of the helpdesk operator displays as Away in the help desk info page and the visual status of the helpdesk in the address book displays as Away.

- **Helpdesk is offline**

: When a user selects the Help desk for a Help desk chat and if none of the help desk operators are available, the Chat Status icon displays as offline.

Click the helpdesk name in the list to chat with the selected helpdesk.

**Other Users:** A list of users are displayed below helpdesk both in the Manage and Mobility applications. These users are arranged in the alphabetical order and their status is represented with:

- **User is online**

: Displays in address book, search contact list & Whose Nearby list when a user is online and is in contact list/address book.

- **User is offline**

: Displays in address book, search contact list & Whose Nearby list when a user is offline and is in contact list/address book.

- **User is online not in address book/contact list**
Getting acquainted with the Collaboration UI

- Displays in search contact list & Whose Nearby list when a user is online but not present in contact list/address book.
  - User is offline and not in address book/contact list

- Displays in search contact list & Whose Nearby list when a user is offline and not present in contact list/address book.

Click or tap a user’s name in the list to start a conversation.

**Related Topics**
- Use Collaboration Tutorial
4 Managing Contacts

Manage Contacts

Locate and manage the contacts in your address book.

To start a conversation, tap a user’s name. You can locate a contact using the following features:

- **Address book in the Collaboration window**: Find a user already added to your address book.
- **Search**: Find users/helpdesks whose name or description contains specific set of symbols using the search key.
- **Who’s Nearby**: Find the users whose latest uploaded location is close to your current physical location. This feature is available in the Mobility application only.
- **Search Contact**: Search Contact can be used to find any other community user.

Related Topics

- Use Collaboration Tutorial

Search for a Contact

You can search for a user by their name.

If a user is an operator of a helpdesk, that particular helpdesk will not be visible in the Collaboration window.

1. From the Collaboration window, click the menu icon

2. Click **Search Contact**.

The Search Contact window opens.
3. Enter the user’s name or part of the user’s name in the **Search Contact** window. The search key should contain at least 2 symbols and is case insensitive.

   In Manage, the list of helpdesks and users whose name or description matches the search key appears as you type. In Mobility, the search results appear when you click **Search**.

4. Click the contact’s name from the list to start the chat.

   ✍ **Note:** You can add this user to your address book so that you don’t have to search for the next time.

**Related Topics**
- Use Collaboration Tutorial
Search for Who’s Nearby

You can locate the nearby resources based on your physical location in the Mobility interface.

1. From the menu icon

   in the Collaboration window, click Who’s Nearby.

   The Nearby window opens with:
   - A list of users whose latest geo location uploaded to the system is close to yours is displayed under Based On Your Physical Location sub-header.
   - The users are arranged according to their distance from your location. Distance is displayed on the right-hand side of the contact name.
   - Initially, ten closest users are displayed. You can click show more to view more users.

2. Click the appropriate user’s name from the list to start the chat.

Related Topics
- Use Collaboration Tutorial
View User Info

Initiate a chat with a user or helpdesk to view their details and add or remove them from your address book. To view user info, add, or remove a user from the address book:

1. From the **Collaboration** window, click the menu icon

2. Click **User Info**.
   
   The **User Info** window opens showing the user’s image or avatar along with their status.

3. From the **User Info** window you can perform the following functions:

<table>
<thead>
<tr>
<th>Click</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone icon</td>
<td>Call the user (available only in the Mobility interface)</td>
</tr>
<tr>
<td>History</td>
<td>View all the previous chats with this user</td>
</tr>
<tr>
<td>Add to address book</td>
<td>Add the user to your address book</td>
</tr>
<tr>
<td>Remove from address book</td>
<td>Remove the user from your address book</td>
</tr>
<tr>
<td>Back arrow</td>
<td>Return to the chat window</td>
</tr>
</tbody>
</table>

4. Click **Add to Address Book** to add users to your address book so that you don’t have to search their names every time to start a chat.
5. Click **Remove From Address Book** to remove users from the address book.

*Note:* The status of the circle icon next to the username changes when you add an user to the address book or remove the user from the address book. For more details, see *About Address Book*.

**Related Topics**
- Use Collaboration Tutorial
5 Configuring Chat Settings

Manage the Chat Notifications

The chat/collaboration notifications feature notifies you about the new message arrivals, group conversations, conference chat invitations, subject to your message pop-up settings.

Notifications provide you information about new message arrival from another user. You can setup the chat notifications from your User Settings > My Display. You can setup sound, vibration and pop-up notifications in this window.
• **Sound:** There are four sound options available— Off, Quiet, Loud, Persistent (repeating sound notifications of an incoming message.) The persistent notification option works only in the Mobility application. By default, the sound notification is set to **Quiet**. The notification sounds when:
  - A user is invited to a conversation or conference
  - A new message is received in an inactive conversation window
  - An activity is reassigned or the inventory transfer is requested
  - The transferred inventory is failed/cancelled/rejected
  - The Helpdesk receives a new request

• **Vibration:** Setup vibration mode for the devices that support vibration alerts.

• **Pop-up Notifications:** Select this option if you to receive notifications as pop-up windows.
About Confining Collaboration to a Single UI

Confining in collaboration indicates the browser and monitor setup options. These options let you manage the incoming message pop-ups.

To support various business needs, you open several windows and interact with multiple resources simultaneously. The number of windows opened can be one per monitor or many windows in one monitor. A message pop-up received in such scenarios can adversely affect the overall user experience and distract your attention. Hence, OFSC Collaboration has come up with settings to manage the appearance of the incoming chat sessions at a window level. These setting still allows you to continue the session from any open window.

You can perform the following setup tasks:

- Control incoming chat pop-ups at a window level based on your user preferences
- Implement the settings immediately without a browser refresh
- Initiate and continue conversations from any monitor
- Setup visual display to denote the pop-ups turned off for this session through icon change or color change

These settings help you view cleaner screens in the current active session. Once you turn off the message pop-ups:

- Incoming chats will not pop-up on your screen. Collaboration icon is still updated with the unread chats.
- You can read and initiate chat from the Collaboration window.
- There is no restriction to initiate and continue conversation from this window
- When the pop-ups are turned off, the collaboration icon is displayed with different visual representation:

   ![Chat Icon]

   **Related Topics**
   - Turn off the Message Pop-ups

Turn off the Message Pop-ups

You can control the incoming chat pop-ups at a window level based on your user preferences. This feature is available in the Manage application only.
This feature improves the usability experience when you use multiple monitors, by providing an option to turn-on and turn-off the incoming chat pop-ups. You get the flexibility to control the incoming chat pop-ups confined to specific monitors only. Message pop-ups are displayed with different visual statuses:

1. Collaboration is connected with incoming chat pop-up.

2. Collaboration is connected without incoming Chat pop-up.

3. Collaboration is disconnected.

1. From the Collaboration window, click the menu icon.
2. Click Turn-off message popup.
   
   The Collaboration icon turns grey and the pop-ups are blocked. You can still see the number of chat message received and can chat with the sender or another user.
3. Click the menu icon and then tap Turn-on message popup to turn-on the chat pop-ups back.

Use the TurnOff Helpdesk Option for Status Change

The Turn off Helpdesk option in the Collaboration Helpdesk menu enables the help desk operator to change the availability status from a specific helpdesk to indicate that they are not available or away.

After the operator selects the Turn off Helpdesk option from the helpdesk, the following changes occur:

- The status of the operators in the address book is updated and displays a yellow dot in the green (online) circle.
- Operators are no longer available for message transfers in the Transfer Conversation window.
- Operators with the Away status can receive messages and can respond to the incoming messages but the operators cannot participate in group conversations.
- Operators with the Away status do not receive any message alert pop-ups.

**Note:** If all the operators in a helpdesk are away and if a resource tries to contact the helpdesk, an Away status is shown to indicate that there are no operators available. However, if a resource sends a message to the helpdesk, it can result in a delayed response.

To enable or disable the Turnoff Helpdesk option:

1. Log in to the Oracle Field Service Cloud Manage or Mobility interface as a helpdesk operator.
2. Click the Helpdesk icon using Collaboration.
3. Select the helpdesk from which you want to change the availability status.
   The Helpdesk Info page displays.
4. Click the Menu icon and select Turn Off Helpdesk.
   The operator is not available for the specific helpdesk.

\[\textbf{Note:}\] To change the availability status, select Turn On Helpdesk.

For example, consider the following scenario:

- Anna belongs to the Upgrade helpdesk and Install helpdesk. Anna only wants to focus on Install issues so she used Turn off Helpdesk for the Upgrade helpdesk.
- Chris belongs to the Upgrade helpdesk and Install helpdesk.
- Glenn, a technician, wants help regarding an urgent Upgrade issue.

Glenn initiates a chat with Upgrade helpdesk. Since, it is an urgent issue; Chris wants help from Anna because Anna has more experience resolving Upgrade issues. Chris uses the Transfer Conversation option to transfer the chat to Anna. Since Anna is not available in the Upgrade helpdesk, Chris cannot view Anna in the Transfer Conversation window so Chris must attempt to resolve the issue or locate another available operator.
6 Managing Chats and Conferences

Start a Chat

Using Collaboration chat feature, you can communicate and collaborate in real time with other members of your team, send an inquiry to a helpdesk, and find the user/helpdesk.

When the Collaboration feature is enabled, you can also start a chat from several locations throughout the Web interface, including the Hints box. Look for links labeled Start Conversation.

1. From the Collaboration window, click the menu icon

2. Click Search Contact to locate a user.
   You can tap or click a user’s name from your address book to start a chat instantly.
   A list of users that match your search criteria appear.

3. Click the user’s name from the search list.
   The chat window opens. If you are the receiver, you will receive a chat notification.

4. If you receive more than one message, click the scroll bar lock icon to lock the chat.
   Chat window will not scroll down automatically when the new messages arrive.

Call a User

Communicate with the resources in your address book via phone calls. Only the users within the same group can communicate with each other. Phone call option will not be available for a user if the phone number is not configured and is only available in the Mobility interface.

The phone number of a resource is configured in the Resource Info page.

1. Open a chat window with a user you wish to call and click the menu icon.

2. Click User Info.
   The User Info window opens displaying the phone number.
3. Click the phone icon

. A confirmation message appears if you wish to proceed.

4. Click Yes to make the call.

If you are a mobile user, the call is placed directly without any confirmation.

Start a Conference in Manage

In OFSC Collaboration, the conference option allows you to conduct business effectively. You can use conference to chat with more than one user.

1. From the Collaboration window, select one of the users you wish to conference chat.

The chat window opens.

2. Find the other user from your address book or using Search User.

3. Drag and drop the user into this chat window.

4. Repeat these steps to add additional users to the conference.

All the messages in the thread are available to all the users in the conference, irrespective of when they join or leave the conference.

5. Click Show to view all the users in the conference.
Start a Conference in Mobility

You can use conference to chat with more than one user in the mobile interface.

1. Log in to the Oracle Field Service Cloud Manage or Mobility interface as a user.
2. Search for a contact or tap a user from your address book.
   The chat window opens.
3. From the menu icon , click **Invite User**.
   The **Invite User** window opens.
4. Enter the name of the other user and click **Search**. You can also select a user from the list you have visibility to.
   A list of users which match with the search criteria appear.
5. Tap the appropriate user’s name from the list.
   The selected user is added to the conference.
6. Click **Show** to view all the users in the conference.
7. Repeat these steps to add more users to this conference.
   All messages in the thread are available to all of the users in the conference, irrespective of when they join or leave the conference.

End a Chat or Conference

When the chat or conference is completed, you can end the conversation and save the thread in your **History**.

If you leave the conversation, you are not notified about new messages in the conversation, but you can still be able to view the conversation in the **History** functionality. If you don’t end the conversation, the thread is still active in the main window.

**Note:** A conference does not end until the last user leaves the conversation. The conversation might continue after you leave. You can access the thread in the history to view the complete conversation.

1. Log in to the Oracle Field Service Cloud Manage or Mobility interface as a user.
2. From the chat or conference window, click the menu icon.
3. Click **Leave Conversation**.
The sender is notified with the {User name} has left the conversation message. If you want to keep chatting with the user, who has left the conversation, enter another message into the existing chat window and the addressee will be re-invited to the chat.

Retrieve a Closed Chat or Conference Thread

When a conversation ends, Oracle Field Service Cloud Collaboration saves the chat/conference in the History window.

1. From the Collaboration window, click the menu icon

2. Click History.
   The History window opens.

3. Search for a keyword or the name of a user who participated in the conversation.
   A list of results appear.

4. Select the appropriate thread from the list.
   The thread displays in a chat window.

\[\text{Note:}\] If the Mobility application is offline, Collaboration is disabled and cannot be accessed. You can still access History to view your chat history in the Read-Only mode.
7 Group Messaging

About Group Messaging

Group messaging lets you to collaborate with multiple users simultaneously.

To support various business events such as ‘area outage in a location’, there can be a necessity to share a common message with a group of users. In such scenarios, you can identify a group of resources based on different business attributes and broadcast your messages to this group. The **Group Messaging** feature lets you to:

- Broadcast a message
- Broadcast an activity
- Start a conference chat with a group

This feature is available in both Manage and Mobility applications.

Group Messaging: Send messages to a group of users simultaneously. Subject to visibility settings and collaboration user groups defined in the system, you can preform the following high-level tasks:

- Initiate group messages
- Send group messages to multiple users in a location
- Broadcast messages
- Initiate conference chats
• Broadcast activities

Message Broadcasting: Broadcast a common message to a group of users simultaneously so that the receiver can take appropriate action based on the information. You can broadcast a message with the following features:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List</td>
<td>View the list of users selected for broadcasting.</td>
</tr>
<tr>
<td>Location</td>
<td>Select the location to initiate group message. System filters the users near that location based on the radius configured.</td>
</tr>
<tr>
<td>Radius</td>
<td>Adjust the radius (up to a max. of 100 miles or kms) to filter the users near a location.</td>
</tr>
</tbody>
</table>

**Note:** You can configure the unit of radius in Configuration > Business Rules.

<table>
<thead>
<tr>
<th>Broadcast message statistics</th>
<th>View the list of users who received the messages successfully.</th>
</tr>
</thead>
<tbody>
<tr>
<td>View the list of users who have read and acknowledged the messages.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Update</th>
<th>Send the updated broadcast messages. Send the message notifications for an already broadcasted message.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure Expiry</td>
<td>Configure expiry period for a broadcasted message. Broadcasted messages are not delivered after the message expiry.</td>
</tr>
<tr>
<td>Chat</td>
<td>Receivers can initiate a one-to-one chat with the sender, even if you acknowledged or unacknowledged the broadcasted message.</td>
</tr>
<tr>
<td></td>
<td>Control the incoming chat pop-ups based on your preferences. You can block the pop-ups for a specific browser, initiate and continue conversation from any monitor and setup visual display that you have turned-off the pop-ups for a session.</td>
</tr>
</tbody>
</table>

| History | You can history of all the broadcasted messages saved in the chat History. |

Activity Broadcasting: Transfer an activity to multiple users simultaneously with the following rules:

- The user that accepts the transfer request first is assigned with the activity.
- The sender is notified if the receiver do not accept the activity with in a defined time limit.
- Before broadcasting an activity, the system filters the users based on the activity attributes like work skill, work zone and service window and then broadcasts the activity to the eligible users only.
- The User that accepts the broadcast message can interact with the sender through a one-to-one chat.
- An activity can be broadcasted even when the users are offline. The users can view the broadcast when they come online.
- The Technicians cannot accept the activity if they are offline.

**Note:** The Allow Activity Move Between Resources permission is required for a user to broadcast the activities.
Conference Chat: Initiate a conference chat with a group of users to communicate business specific information with multiple users simultaneously.

- Initiate a conference chat with the users based on your visibility settings.
- You can choose the receivers from a group for the conferencing purpose. The group can be collaboration user group, dispatcher group, or users in a location.

**Related Topics**

- Initiate a Group Message by the User Group
- Broadcast an Activity in Manage
- Broadcast an Activity in Mobility
- Send a Group Message by Location

### Initiate a Group Message by the User Group

Subject to visibility settings and collaboration user groups defined in the system, you can send messages to a group of users simultaneously.

You need to have access to user groups to access this feature. You can select more than one user groups at a time.

To initiate a Group Message (Broadcast or Conference):

1. From the **Collaboration** window, click the menu icon

2. Click **Group Message**.
   
   The **Group Message** window opens.

3. Click **User Group** and select the appropriate group from the list.

4. Click **Next**.
   
   The **Message Type** window opens.
5. Select the message type icons from the following Show User options:
   - Broadcast
     - Recipients cannot see each other and their responses.
   - Conference
     - All users can see each other and their responses.

6. If you select message broadcasting, setup:
   - Click Expiry to setup expiry time in minutes, hours and days for the broadcasted message. The maximum limit for the expiry period is 10 days.
     - **Note:** The expiry time will be visible in the recipient’s window.
   - Click Acknowledgement to activate acknowledgement notification for your broadcasted messages. You can view the acknowledgement statistics when the receivers acknowledges the message.
     - **Note:** You can also setup Acknowledgement when the broadcast has started.

7. Click Show Users to view the list of recipients. You can view ten users at a time till you reach 100 users.

8. Click Start Broadcast or Start Conference as per your need.
   The group message is initiated.
Related Topics

- Broadcast a Message
- Start a Group Conference

Broadcast a Message

Broadcasting option allows users to communicate a common message with multiple users from the user groups or by location simultaneously. Broadcasting is not conversation between users.

Recipients does not know if the other users have received the same message. Recipients can acknowledge a broadcast message or initiate a one-to-one chat with the sender.

1. From the Collaboration window, click the menu icon

2. Click Group Message.
   The Group Message window opens.

3. Click User Group and select the appropriate group from the list.

4. Click Next.
   The Message Type window opens.

5. Click the broadcast option

6. If you select message broadcasting, setup:
   - Click Expiry to setup expiry time in minutes, hours and days for the broadcasted message. The maximum limit for the expiry is 10 days. The recipients can see the expiry time setup in their windows.
   - Click Acknowledgement to activate message acknowledgement option. The receivers can acknowledge the message and you can view the statistics of the acknowledged messages. You can also setup Acknowledgement when the broadcast has started.

7. Click Start Broadcast.
   The Broadcast window opens.
8. Enter the broadcast message and click **Send**.
9. Click **Recipients** to view the broadcast attributes such as acknowledged, read, successfully delivered, and not delivered counts.

If the acknowledgment is not setup, you can view the list of users who read the broadcast message, to whom all the message successfully delivered and failed to deliver. If the count of recipients is more than 100, the system displays only the count of users in each category and the user name and avatar will not be displayed.

10. The recipients can then open the broadcasted message and click:
   - **Acknowledge**: Broadcast the acknowledgement message to the sender.
   - **New Conversation**: Start a one-to-one chat with the sender.
Start a Group Conference

Conferencing feature allows you to initiate a group conversation and share a message to all group members including the full list of participants of the chat.

You can select the recipients from collaboration user group or from a location. Currently, the system allows you to initiate conference with 100 users simultaneously.

> **Note:** All users can see each other and their responses in the conference.

1. From the **Collaboration** window, click the menu icon

2. Click **Group Message**.
   The **Group Message** window opens.

3. Click **User Group** and select the appropriate group from the list.
4. Click **Next**.
   The **Message Type** window opens.

5. Click the conference option

6. Click **Start Conference** to initiate a group conference.
   The **Conference** window opens.

7. Enter the conference message and click **Send**.
8. Click **Show** to view the list of recipients. Tap a user from the list and click **New Conversation** to start a one-to-one chat.
   The recipients can leave the conference, invite user and share their location with the sender.

**Group Message Broadcasting to Supervisor Groups or Helpdesk Groups**

Using the **Group Message** option, a supervisor or a helpdesk operator can perform the following actions:

- Select supervisor groups from Collaboration and broadcast message or initiate conference with the team members.
- Select helpdesk groups from Collaboration and broadcast message or initiate conference with the team members.

Important information related to the feature:

- Message broadcasting to Helpdesk group is only available in the Oracle Field Service Cloud Manage interface.
- A supervisor can broadcast message to all the members in a supervisor group, even if the visibility between the supervisor and members of that group is not configured. However, the user and the supervisor cannot have a one-to-one chat, if the visibility is not configured between the groups (that is, if the supervisor and the user belong to different groups).
- A supervisor can initiate a conference to all the members in a supervisor group, even if the visibility between the supervisor and members of that group is not configured. However, the user and the supervisor cannot have a one-to-one chat, if the visibility is not configured between the groups (that is, if the supervisor and the user belong to different groups).

To broadcast a message in a group or initiate a conference with the team members:

1. Log in to the Manage interface as a supervisor user.
2. From the **Collaboration** window, click the menu icon.
3. Select the **Group Message, User Groups** option.
   The supervisor groups that the user monitors along with the collaboration user groups to which the user has visibility are displayed.
4. Select the required user groups and click **Next**.
5. Select the **Broadcast** or **Conference** option from the **Message Type** window and click **Start Broadcast** or **Start Conference**.
   The Broadcast or Conference window displays.
6. Enter the message in the **Broadcast** or **Conference** window and click **Send**.
   The message is sent to the users in the selected user groups.
7. Click **Recipients** to view the broadcast attributes such as acknowledged, read, successfully delivered, and not delivered counts.

   Similarly, if you are a helpdesk operator, you can broadcast message or initiate conference with the team members as follows:
8. Log in to the Core Manage interface as a helpdesk operator.
9. Repeat steps 2 through 7.

Send a Group Message by Location

You can select the users near a specific location in the map view to send the group message. You can also adjust the radius, up to a max. of 100 miles or km, to filter the users near to that location.

You can define the location radius unit as miles or km in Configuration > Business Rules > Map Parameters. You can view the selected list of recipients before broadcasting the message (10 at a time till a maximum of 100 users are reached).

1. From the Collaboration window, click the menu icon

2. Click Group Message.
   The Group Message window opens.
3. Click Location and select the appropriate group from the list.
   The count of the users nearby the selected location appears.
4. Enter the message and click **Send**.

### New Activity Broadcasting Assignment

Routing can automatically broadcast an activity to multiple users simultaneously whenever an activity is created in a bucket. Only resources with matching work skills, work zones, and active calendars are included during activity broadcast. See the Assignment and Fallback options for Activity Broadcasting section in the Oracle Field Service Cloud Using Routing Cloud Service Guide for more information.

After an activity is broadcasted, the **New activity** header displays in the collaboration window and the resource has an option to accept or reject the activity assignment.

The activity is assigned to the first resource who accepts the activity. In case of assignment failure or time out, the system triggers an alert to the users.

When a resource accepts the activity, other resources in the same collaboration window are notified with the message, **Activity reassigned to another user.**

A resource who rejects the activity is notified with the message, **You have rejected the activity reassign.**

> **Note:** The **Accept**, **Reject**, and **Timeout** options work in the same way when you use the **Activity Move** option in the collaboration window to transfer the activity.

### Broadcast an Activity in Manage

You can broadcast an activity to multiple users simultaneously, subject to your visibility. Before broadcasting the selected activity, the system filters the users based on the activity attributes like work skill, work zone and service window and then broadcasts the activity to the eligible users only.

You can view the selected list of recipients before broadcasting the message (10 at a time till a maximum of 100 users are reached). The recipient who accepts the transfer request first is assigned with the activity and can interact with the sender via a one-to-one chat. The maximum time period for the message expiry is 10 days.

> **Note:** The **Allow Activity Move Between Resources** permission is required for a user to broadcast the activities.

1. From the **Collaboration** window, click the menu icon

2. Click **Group Message**.
   - The **Group Message** window opens.

3. Click **Activity**.
The **Broadcast** window opens.

4. Locate the appropriate activity and drag and drop into the **Broadcast** window.

![Broadcast Window](image)

You can broadcast an activity in the pending status only.

5. You can further filter the users to whom you want to broadcast the activity by their location. Click **Filter users** and adjust the radius of the location to maximum of 100 miles or km.

6. Click **Set** to go back to the activity transfer window.

7. Click **Send**.

The selected activity is broadcasted.

   - **Cancel**: Click this option to cancel the activity broadcast.

   - **Resend Activity**: If the activity is not accepted by any receiver within 10 minute, the transfer is timed out and is notified to the sender. Click this option to resend a transfer cancelled activity, and the timed out or failed activity.

    📝 **Note**: From the menu icon, click **Resend Activity** to access this feature.

8. The recipient can:

<table>
<thead>
<tr>
<th>Click</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept</td>
<td>Activity will be reassigned to you</td>
</tr>
<tr>
<td>Reject</td>
<td>Cancel activity reassignment</td>
</tr>
<tr>
<td>New Conversation</td>
<td>Start a one-to-one chat with the sender</td>
</tr>
<tr>
<td>Details</td>
<td>View the activity schedule, direction and duration details etc</td>
</tr>
<tr>
<td>menu icon</td>
<td>Leave the broadcast message</td>
</tr>
</tbody>
</table>
The broadcasted activity is reassigned to the recipient who accepts it first.

Broadcast an Activity in Mobility

You can broadcast an activity to multiple users simultaneously, subject to your visibility. Before broadcasting the selected activity, the system filters the users based on the activity attributes like work skill, work zone and service window and then broadcasts the activity to the eligible users only.

The Allow Activity Move Between Resources permission is required for a user to broadcast the activities.

Note: In Mobility, the activity broadcast option is displayed only when you select an activity to broadcast.

1. From your Home page, locate the activity you wish to broadcast.
   
   You can broadcast the activities in pending status only.

2. Click the activity.
   
   The Activity Details page opens.
3. From the Collaboration window and click the menu icon.
4. Click Group Message.
   The Group Message window opens.
5. Click Activity.
   The selected activity is attached to the Broadcast window.
6. Click Filter users to filter the recipients based on the proximity to the activity location with a maximum radius of 100 miles or km configured.
   Filter option will not be available if the activity’s location is not available or if the technicians does not have a updated GPS position. The Recipients window displays 100 nearby users. If the count of recipients is more than 100, the user list displays only the count.
7. Click the send message icon.
   The activity is transferred. When the activity is transferred, you can:
   o Cancel: Click this option to cancel the activity broadcast.
   o Resend Activity: If the activity is not accepted by any receiver within 10 minute, the transfer is timed out and is notified to the sender. Click this option to resend a transfer cancelled activity, and the timed out or failed activity.

Note: From the menu icon, click Resend Activity to access this feature.
8. The recipients can:

<table>
<thead>
<tr>
<th>Click</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept</td>
<td>Accept the broadcasted activity. Activity will be reassigned to you</td>
</tr>
<tr>
<td>Reject</td>
<td>Cancel activity reassignment. The reject chat is saved in History and you will not be notified about new messages in the broadcast.</td>
</tr>
<tr>
<td>New Conversation</td>
<td>Initiate one-to-one chat with the sender</td>
</tr>
<tr>
<td>Leave Broadcast</td>
<td>Leave the Broadcast window</td>
</tr>
</tbody>
</table>
8 Managing Context Awareness Features

About Context Awareness

Context awareness in the Oracle Field Service Cloud Collaboration window is a quick navigation tool which provides easy access to various related information. This feature enhances user experience with the addition of application-specific gestures to ensure intuitive and efficient interactions. You can use it to view the user details and share inventory/activities.

Using this feature you can:

• Start a chat with a user
• Share the details of a resource
• Share the details of an activity/inventory
• Reassign the activities
• Transfer the inventory to a resource using Collaboration

Other than the context awareness features in collaboration, Manage and Mobility applications also support resource and activity hints directly from the Activities page.

Related Topics

• About Context Awareness Features in Manage
• About Context Awareness Features in Mobility

About Resource and Activity Hints in Manage

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. The resource icon in a group/bucket or activity time line lets you to manage resource details.

Resource Hint: When you click or tap the resource icon

lets you to view the resource hint.
Click To:

<table>
<thead>
<tr>
<th>Click</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Activity</td>
<td>Create new activity in the user’s time line.</td>
</tr>
<tr>
<td>Start Activity</td>
<td>Start the selected activity.</td>
</tr>
<tr>
<td>Activate Route</td>
<td>Activate a resource’s route. This is a signal to the dispatcher and to your supervisors that you are ready to work and available to take jobs.</td>
</tr>
<tr>
<td>Deactivate Route</td>
<td>Deactivate an activated route at the end of the working day.</td>
</tr>
<tr>
<td>Assign to team</td>
<td>Allocate a resource to a team for assisting purpose.</td>
</tr>
<tr>
<td>Show non-scheduled</td>
<td>View all the non-scheduled activities of a resource.</td>
</tr>
<tr>
<td>Show scheduled</td>
<td>View the scheduled activities of a resource in the activity time line.</td>
</tr>
<tr>
<td>Select resource</td>
<td>View the selected resource’s time line separately.</td>
</tr>
<tr>
<td>Print</td>
<td>Print the resource’s activity records with specific activity type, start and end time.</td>
</tr>
<tr>
<td>Export</td>
<td>Save the activity records in .csv file format.</td>
</tr>
</tbody>
</table>

Activity Hint: An *activity* hint displays 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 displays.
About Resource and Activity Hints in Mobility

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. The resource icon in a group/bucket or activity time line lets you to manage resource details.

Resource Hint: Click or tap a resource’s name in the group to view the resource hint.
Icons on the hint enable you to:

<table>
<thead>
<tr>
<th>Click</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chat icon</td>
<td>Chat with the resource</td>
</tr>
<tr>
<td>Route icon</td>
<td>Access that resource’s route</td>
</tr>
<tr>
<td>Resource info icon</td>
<td>Access the resource information</td>
</tr>
</tbody>
</table>

Activity Hint: 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 displays.
If the activity has resolved coordinates, the hint contains the map showing the activity location.

To view more information about the activity, click **Details**.

To close the activity hint, click or tap the “X” or on the screen anywhere outside the hint.
9 Sharing resources, activities, and inventory in Manage

About Context Awareness Features in Manage

Context awareness in the Oracle Field Service Cloud Collaboration window is a quick navigation tool which provides easy access to various related information. In Manage, you can move and share activities though this feature.

Your user type must have the privilege to move activities or inventory to perform these tasks.

The Manage application supports both the Collaboration and Helpdesk features. Click the community icon to open the Collaboration window and helpdesk icon to open the Helpdesk window.

You can perform any of the following collaboration tasks:

<table>
<thead>
<tr>
<th>Click</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Contact</td>
<td>Locate a contact by the name</td>
</tr>
<tr>
<td>History</td>
<td>View the one-to-one or conference chat history</td>
</tr>
<tr>
<td>User Info</td>
<td>View the user details such as full name, image and to:</td>
</tr>
<tr>
<td></td>
<td>• View chat History</td>
</tr>
<tr>
<td></td>
<td>• Add user to the address book</td>
</tr>
<tr>
<td>Group Message</td>
<td>Start a group chat based on the user group or location</td>
</tr>
<tr>
<td>Turn off message pop-ups</td>
<td>Restrict the message pop-ups</td>
</tr>
<tr>
<td>Leave Conversation</td>
<td>Drop-off of a one-to-one or conference chat</td>
</tr>
<tr>
<td>Invite User</td>
<td>Send conference chat invitation to multiple users</td>
</tr>
<tr>
<td>Share Inventory</td>
<td>Share inventory with a contact</td>
</tr>
<tr>
<td>Share Activity</td>
<td>Share an activity with a contact</td>
</tr>
<tr>
<td>Helpdesk features</td>
<td>Accept a helpdesk request and transfer a request to other helpdesk operator</td>
</tr>
</tbody>
</table>

Features like location sharing and who’s nearby are not supported in Manage.
Share a Resource

You can use chat to provide supplementary information to a specific Collaboration user. Sharing resource includes information about resource and activity details with a user/helpdesk operator in the Manage/Mobile applications.

1. Open the **Collaboration** window with the user/helpdesk.
2. Select a bucket in the left-hand side panel to view the resources.
3. Drag and drop the appropriate resource you wish to share from the list to the chat window.
4. Click **Send**.

   The addressee will receive the resource shared.

Share an Activity

You can share an activity with another resource or helpdesk user as part of your work. To share or reassign an activity:

1. Open the **Chat** window with the user/helpdesk.
2. Go to **Dispatch > Activities**, select a bucket in the left-hand side panel.
   
   All the activities in the selected bucket appears.

3. Drag and drop the activity that you want to transfer.
   
   Only pending activities can be reassigned.

4. Select one of the options:
   
   a. **Send info**: To share the activity information with the addressee.
b. **Reassign:** To reassign the selected activity to the addressee.

5. Click **Send**.

   The addressee will receive the activity.

6. If the activity transfer is cancelled after sending it due to the reasons such as timed out or failed, you can transfer the same activity again by dragging and dropping in to the chat window.

### Share an Inventory Item

You can share an inventory item with the user/helpdesk you are chatting with.

Inventory transfer is not available if:

- You doesn’t have the necessary permissions
- The action is not permitted by the inventory type settings
- You are not in a one-to-one chat
- The Inventory does not belong to the technician’s pool

To share or reassign an inventory item:

1. Open the **Chat** window with the user/helpdesk.
2. Go to **Settings > Inventories** to locate the inventory item that you wish to share.
3. Drag and drop the inventory item into the chat window.
4. Select one of the options:
   a. **Send info:** To share the inventory details with the addressee.
   b. **Reassign:** To reassign the selected inventory to the addressee.
5. Click **Send**.

### Accept a Helpdesk Request

You can accept the incoming request from an operator through your **Helpdesk** window.

**Helpdesk** window is designed for the helpdesk operators. You can access this window only if you have helpdesks assigned. In that case, the helpdesk icon

appears, next to the **Collaboration** icon

The **Helpdesk** window displays a list of online and offline helpdesk operators. The helpdesk icon displays a number next to it, representing the number of unaccepted requests.
The helpdesk operator cannot initiate a conversation. Operators can only respond to the requests received from the resources. In order to start participating in the conversation, the operator needs to acknowledge the request.

To respond to helpdesk requests:

1. Log in to the Oracle Field Service Cloud Manage or Mobility interface as a helpdesk operator.
2. Click the helpdesk icon

   ![Helpdesk Icon]

   The Helpdesk window opens.
3. Click the name of the Helpdesk to view the unanswered requests.
4. Select the request that you wish to answer.

   The chat window opens and the messages from the requestor appear.

   ✷ Note: Unless the operator takes the chat, it is marked unacknowledged and the time stamp turns red if the threshold time is crossed. The time displayed is the average waiting time in all the active chats.
5. Click Take Chat.

   Once the operator takes a chat, the conversation is acknowledged, and the operator can answer the questions. The acknowledged conversations can be transferred to the other helpdesk operator. The user who requested assistance is also notified. Also, the reason for transfer (if provided) is displayed in the Helpdesk window.

   If there are no pending requests for assistance, an operator can help out with chats in progress with the other helpdesk operators.
6. In order to view the chats in progress, click the settings icon

   ![Settings Icon]

   in the Helpdesk window and click Chats in Process.

### Transfer a Helpdesk Conversation

You can transfer a request to another helpdesk agent suitable to fulfill the request.

1. Log in to the Oracle Field Service Cloud Manage or Mobility interface as a helpdesk operator.
2. Select a user from the Collaboration window.

   The user window displays.
3. Click the Menu icon.

   ![Menu Icon]

4. Click Transfer Conversation.
5. Select the helpdesk operator to whom you want to transfer the conversation.
The **Transfer Conversation** window displays.

6. Enter a reason.
7. Click **Transfer**.

**Transfer of Non-serialized Inventory in Manage**

You can transfer a fixed quantity of non-serialized inventories between resources using the Oracle Field Service Collaboration Cloud Service module in Oracle Field Service Cloud Manage.

You can perform the following actions:

- View the total number of available inventories and required number of inventories for a future activity.

  ✍️ **Note:** You can have more number of inventory available than what is projected in the system. Therefore, you can transfer more inventory than the available quantity. In such case, system is updated with a negative value of available quantity.

- Define the required number of inventories that you want to transfer in the Collaboration window.

To transfer a non-serialized inventory:

1. Log in to the Oracle Field Service Cloud Manage interface.
2. Navigate to **Inventories** for a specific resource.
   - The Inventories page of the user displays.
3. From the **Collaboration** window, click the menu icon
4. Click **Search Contact** to locate a user.
   For example, assume that you want to transfer the inventories to the technician, William. Therefore, locate William in the Search Contact list and select William to open the chat window.

5. Select the non-serialized inventory that you wish to transfer and drag and drop it to the chat window.

6. Select the **Transfer** option in the chat window.

7. Enter the quantity that you wish to transfer in the **Quantity** field.

8. Click **Send**.
   The recipient should accept the inventory transfer to complete the process.

9. To view the updated inventory in the Manage interface, select **View** from the **Actions** column.

   ✍️ **Note:** The maximum quantity that can be transferred or received by a user is 2,147,483,647 units.

10. To view the updated inventory in the Mobility interface, select **Inventory** in the Oracle Field Service Cloud Mobility interface and view the updated inventory in the Inventory list.
10 Sharing resources, activities, and inventory in Mobility

About Context Awareness Features in Mobility

Context awareness in the Oracle Field Service Cloud Collaboration window is a quick navigation tool which provides easy access to various related information. In Mobility, you can use the Collaboration feature to communicate and collaborate in real time with other members of your team. From the mobile interface, you can move activities and inventory, share your location directly in the chat window.

Your user type must have the privilege to move activities or inventory to perform this task. Activate the Oracle Field Service Cloud Location to specify your location details through the Oracle Field Service Cloud Collaboration.

Note: Collaboration does not work when the mobile application is in offline mode. Helpdesk features such as taking chat from the resources, transfer chats is not supported in mobility. However, a mobility user (if configured properly) can see Helpdesks based on their privileges and can post messages to that Helpdesks.

Click the community icon

to open the Collaboration window.

You can perform any of the following collaboration tasks in Mobility:
**Share an Activity**

From the mobile interface, you can move activities and inventory directly in the chat window.

1. Open the **Chat** window with a resource.
2. Locate the activity that you wish to share.
3. From the menu icon

   ![Menu Icon]

   in the chat window, click **Share Activity**.

   The selected activity is attached to the chat window.

4. Click the send message icon

   ![Send Message Icon]

   The activity is shared.

5. Click **Resend Activity** to transfer the timed out or failed activity.

   If the activity is not accepted by the receiver within 10 minutes, the transfer is timed out. You will receive a notification about the transfer status. Based on the notification, you can resend or cancel the transfer.
Share Files from Gallery

A user can share files or images that is taken from the camera or upload a file from the device gallery to another user using the Field Collaboration Chat window. Recipients can either view the shared images or download the images on their devices.

- Ensure that the Share images via chat permission option is enabled for the Oracle Field Service Cloud Mobile app users.
- Ensure that the file storage is set up in the system for using the Share Image functionality.

Note: This functionality is only available for Oracle Field Service Cloud mobile users.

To share files from gallery:

1. Log in to the Oracle Field Service Cloud Mobility interface as a user.
2. From the Collaboration window, click the menu icon.
3. Click Search Contact, enter a user’s name, and click Search to locate a user.
4. Tap or click a user’s name.
   The chat window displays.
5. Click

   ![Chat window]

6. Click

   ![View Gallery]

and select a file from the device gallery or click

   ![Camera icon]

   to take a photo and share it with the user.

The selected file or the photo captured is uploaded to the chat window. The recipient can preview the image and download the file (if required).

Note:

- The selected image is automatically re-sized to 800 pixels (width).
- The above steps may vary based on the device or the operating system.
Share an Inventory

From the mobile interface, you can share an inventory to a resource through the chat window.

1. Open the Chat window with a resource.
   The chat window opens.
2. Locate the inventory that you wish to share.
3. From the menu icon
   in the chat window, click Share Inventory.
   The selected activity is attached to the chat window.
4. Click the send message icon

   The inventory is shared.

Accept Moved Activity or Inventory Item

Accept the activities and inventory assigned to you before moving them.

If you receive an activity or inventory item through the chat window, you will receive a message notification.

1. From your Collaboration window, open the chat received.
   The chat window opens with the activity/inventory attached.
2. Click Accept to move the activity or item to your schedule.
3. Click Reject to cancel the move.

Transfer a Non-serialized Inventory

Collaboration lets you to transfer a fixed quantity of non-serialized inventories with another technician in a single move.

This feature lets you to:

- View the total number of inventories available and required number of inventories for a future activity
**Note:** You can have more number of inventory available than what is projected in the system. Therefore, you can transfer more inventory than the available quantity. In such case, system is updated with a negative value of available quantity.

- Define the quantity in natural numbers to transfer
- View the required inventory for a future activity

To transfer a non-serialized inventory:

1. Open the **Chat** window with a resource.
   The chat window opens.
2. Locate the inventory that you wish to transfer.
3. From the menu icon in the chat window, click **Transfer Inventory**.

4. Enter the quantity that you wish to transfer in **Quantity**.
5. Click the send message icon.
The specified quantity of the inventory is transferred.

Reassign an Activity or Inventory

You can reassign the activities or inventory to another resource in the mobile interface.

1. Locate the activity or inventory item that you want to move.
2. Open the Collaboration or Helpdesk chat box.
3. Select the user that you want to move the item to.
4. Click the menu icon
   - For activities, choose Reassign Activity.
   - For the inventory items, select Transfer Inventory
5. Click Send.

The addressee will receive the message: Shared activity/inventory info {Activity/Inventory icon} {Activity/Inventory identifier}.

Cancel a Move

You can cancel moving an activity or inventory item any time before the new owner accepts it. If the new owner has already accepted, you cannot move it back to the original owner.

1. In the Chat window, locate the move.
2. Click Cancel.

When an activity reassignment/inventory transfer is started, the recipient will see the basic details of the activity/inventory and can either accept or reject the transfer. If the recipient doesn’t accept or reject the transfer for a significant period of time or if the user accepted but the transfer takes too long, then the operation is timed-out. Reassignment / Transaction is also cancelled automatically, if the sender or the recipient leaves, or a new contact joins the chat before its completion.

Share your Location

Share your location to meet a technician and collaborate with each other to perform the activities. You can share your location as a micro map and receive the direction assistance to a location based on your native map application.

Using this feature, you can:

- Share your location via micro map
- Change your current location in the micro map and share updated location with the technicians
• View the location with distance in between the location points
• Get the driving assistance link to reach the location
• View the expected time to reach the destination

To share location other technicians:

1. Open the **Chat** window with a resource.
2. From the menu icon

   , click **Share Location**.

   Your current location is attached as a micro map.

3. To update your location, click inside the map and select another location.
4. Click the send icon

   Directions are sent as Micro maps, Google maps and Oracle mapview based on your company configurations.

5. The receiver can then click **Get Driving Directions** to view the directions.

   Map opens showing the directions to the marked location along with the Time and distance to reach the location.
Related Topics

- Get the Direction Assistance

Get the Direction Assistance

View the direction assistance link along with the location map when a mobile user reaches out to you.

The Get Driving Direction link invokes the map view based on your device to get the driving direction assistance as follows:

- Android users - System invokes your native map application. You can select the appropriate application for the direction assistance.
- iPhone users - System invokes the native apple map application for the direction assistance.
- Other devices - System redirects to the Oracle map. You can get text based direction assistance to the location.

To obtain driving assistance:

1. Open the chat along with the location details received from a user.
   The chat window with location map opens.
2. Click **Get Driving Direction**.
   Map view is invoked based your native map application with the travel distance and time details.

3. Click the distance option in the map view.
   A driving hint with directions to reach the location appears.
# 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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<tbody>
<tr>
<td>August 2017</td>
<td>Minor changes for clarity and consistency</td>
<td></td>
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<tr>
<td>June 2017</td>
<td>Minor changes for clarity and consistency</td>
<td></td>
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<tr>
<td>May 2017</td>
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<td></td>
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<tr>
<td>April 2017</td>
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<tr>
<td>Feb 2017</td>
<td>Added the following topics:</td>
<td>Revised managing contacts, managing chat and conference and context awareness chapters to more accurately reflect the Oracle Field Service Collaboration Cloud Service user interface.</td>
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<tr>
<td></td>
<td>• Use the TurnOff Helpdesk Option for Status Change</td>
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<tr>
<td></td>
<td>• New Activity Broadcasting Assignment</td>
<td></td>
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<tr>
<td>Jan 2017</td>
<td>Minor changes for clarity and consistency</td>
<td></td>
</tr>
<tr>
<td>Nov 2016</td>
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<tr>
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<tr>
<td>Sep 2016</td>
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<tr>
<td>Aug 2016</td>
<td>Added new information about the following:</td>
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<tr>
<td></td>
<td>• Sharing your location</td>
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<td>• About group messaging</td>
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<td>• Broadcasting an activity in Manage and Mobility</td>
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<td>• Confining collaboration to single UI</td>
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<td>• Transferring non-serialized inventory</td>
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<td>Apr 2016</td>
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