Oracle Field Service Cloud

Using Cloud Portal for Oracle Field Service Cloud

19C
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Preface

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

Using Oracle Applications

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

Documentation Accessibility

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- For web-based user guide, Web-based User Guide Survey
- For tutorial feedback, Tutorial Survey
1 Introduction to Cloud Portal

Cloud Portal

The Cloud Portal provides information about the service for which the user has an active subscription.

Cloud Portal is the centralized access point where you go to manage your Oracle Cloud deployments and instances. Cloud Portal provides options for both monitoring and operating your services. The My Accounts feature allows you to monitor the status of services for an entire account, across multiple data centers and identity domains. My Account displays information about active, expired, and pending services. The My Accounts feature lets you monitor and operate all active services within a single identity domain. You use Oracle Cloud Applications Console to perform all operating tasks after your services are activated.

For more information about the Cloud Portal, see the Cloud Portal library on Oracle Help Center.

Field Service Cloud and Cloud Portal

In this document, you can find information specific to Field Service Cloud settings for Cloud Portal.

The Field Service Cloud Service is available to the user only if the user has completed the following activities:

- Subscription Provision Request— The user must have requested for Field Service Cloud Service Provision.
- Activating the Service — The user gets an e-mail confirmation after successful subscription request. An activation link is provided in the e-mail, using which the user must activate the service.
2 How You Monitor Your Usage

View Usage Details in Billing Metrics

The Billing Metrics tab provides details about the OFSC Service usage and the charges for the usage. These details were sent to the users manually, but, using the Cloud Portal, the users can view the service usage anytime. You can view the billing metrics for any specific period using the Calendar selection.

```
From: 04/04/18  To: 06/28/18  
```

Download Resource Information as CSV File

You can download the resource information as a CSV file using this option.

1. Under the Billing Metrics tab, click Download as CSV file.

A dialog appears on the screen. You can select an option to Open or Save the CSV file.

Resource Summary

This section provides information about the subscribed resources.

The Resource Summary lists the resources based on which the user is billed for the OFSC Service. The Billing Metrics information is calculated based on one of the following resources:

- Hosted Named Seat Month
- Hosted Named User
- Appointments

The metrics information will be populated for only one of the above resources that is included with the customer contract.
3 Business Metrics

View Business Metrics for Any Period

The Business Metrics tab provides details about the business metrics displayed on the Cloud Portal.

Note: The Business Metrics is calculated during the end of the day and only for the Production environments.

To view the Business Metrics for a particular period, use the procedure below:

1. From the Calendar option, select the dates for which you want to view the business metrics.
2. From the drop down list, select the type of business metrics you want to view. The specific Billing Metrics appears as a graph on the screen.

Types of Business Metrics

The following table lists different types of business metrics:

<table>
<thead>
<tr>
<th>Metrics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File management: number of files</td>
<td>Provides information about a file storage usage metric, namely: number of requests to File storage grouped by day</td>
</tr>
<tr>
<td>File management: number of bytes</td>
<td>Provides information about a file storage usage metric, namely: number of transferred bytes grouped by day</td>
</tr>
<tr>
<td>Number of logged users</td>
<td>Provides information about the number of active users that logged into the system grouped by day</td>
</tr>
<tr>
<td>Number of technicians</td>
<td>Provides information about the number of active Field resources grouped by day</td>
</tr>
<tr>
<td>Number of activated routes</td>
<td>Provides information about the number of active routes grouped by day</td>
</tr>
</tbody>
</table>
### Business Metrics

<table>
<thead>
<tr>
<th>Metrics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of sent messages</td>
<td>Provides information about the number of messages sent out through the Notification Engine grouped by day</td>
</tr>
<tr>
<td>Number of auto-routed activities</td>
<td>Provides information about a Routing usage metric, namely: % of auto-routed activities</td>
</tr>
<tr>
<td>Number of manually assigned jobs</td>
<td>Provides information about a Routing usage metric, namely: % of manually assigned jobs</td>
</tr>
<tr>
<td>Number of not-routed jobs</td>
<td>Provides information about a Routing usage metric, namely: % of not-routed jobs</td>
</tr>
<tr>
<td>Routing Usage</td>
<td>Provides information about a Routing usage metric, namely: a number of routing runs per day</td>
</tr>
<tr>
<td>Average Travel Time</td>
<td>Provides information about a Travel time metric, namely: average travel duration per day.</td>
</tr>
<tr>
<td>Number of assigned appointments</td>
<td>Provides information about the number of assigned jobs metric, namely: average number of assigned jobs per Field resource per day</td>
</tr>
<tr>
<td>Number of completed assignments</td>
<td>Provides information about the number of completed jobs metric, namely: average number of completed jobs per Field resource per day</td>
</tr>
<tr>
<td>Number of cancelled appointments</td>
<td>Provides information about the number of cancelled jobs metric, namely: average number of cancelled jobs per Field resource per day</td>
</tr>
<tr>
<td>Number of suspended appointments</td>
<td>Provides information about the number of suspended jobs metric, namely: average number of suspended jobs per Field resource per day</td>
</tr>
<tr>
<td>Number of not done appointments</td>
<td>Provides information about a number of not done jobs, namely: avg. number of not done jobs per Field resource per day</td>
</tr>
<tr>
<td>% of appointments started in time</td>
<td>Provides information about the % of jobs that started within Service window</td>
</tr>
<tr>
<td>% of appointments not started in time</td>
<td>Provides information about the % of jobs that started after Service window end time</td>
</tr>
<tr>
<td>% of appointments completed within SLA</td>
<td>Provides information about the % of jobs completed within SLA window</td>
</tr>
<tr>
<td>% of appointments completed outside SLA</td>
<td>Provides information about the % of jobs completed outside SLA window end time date and time</td>
</tr>
</tbody>
</table>
4 Field Service Cloud Service Console

About the Field Service Cloud Service Console

The Oracle Field Service Console provides details about the instances that are provided to the customer for the subscription.

If a customer buys base Stock Keeping Unit (SKU), it includes one Production instance and two Test instances. But, the customer can buy more Test instances depending on the business need.

Your Provisioned Instances

The number of instances a customer gets depends on the subscription.

Depending on the subscription, a customer gets one production instance and at least two test instances. You can view the instance details from the Open Service Console button.

Once you click the Open Service Console window, you can view the details of the instances related to the particular service.

Production Instance

The Production Instance has the following details:

- Subscription ID
- Instance Name
- Version
- URL

If the Production Instance is in configuration mode, the existing data in Production Instance is overwritten by the data copied from the Test Instances. Once the instance is moved to Production Go-Live mode, the instance can be updated using the GUI, Export/Import, or using APIs only.

Test Instance

The Test Instance has the following details:

- Type
- Instance Name
- Version
- URL
Rename an Instance

You can rename an auto-generated instance name to a meaningful name which will be visible to users on login screen and this becomes part of instance URL.

However, the auto-generated instance remains as is and the instance can be accessed using it.

Use the procedure described below to rename an instance:

1. Login to Oracle Field Service Cloud Service Console with your credentials.
   You can see the list of your subscribed instances.
2. For any of the listed instances that you want to rename, click on the menu present on the right side of the instance.
3. From the drop down menu, select **Rename Instance**.
   A pop up window ‘Rename Instance’ appears on the screen.
4. Enter a valid name for your instance and click **Rename**.
   
   **Note:** A valid instance name can have numbers (0-9), lowercase letters (a-z), and dashes (-). The instance name must start and end with an alphanumeric number.

Reset an Admin User

You can reset an admin user by creating a new user or resetting password for an existing administrator from the Field Service Cloud Service Console.

Use the following procedure to reset an admin user:

1. Login to Oracle Field Service Cloud Service Console with your credentials.
2. For any of the subscribed instances that you want to reset admin password, click on the menu present on the right side of the instance.
   The Reset Admin User window appears on the screen.
3. Select Reset Password and click Continue.
4. Enter the admin username in the Username text box.
5. Click Generate Password.

A confirmation window appears on the screen.

**Note:** You cannot reset password for users related to ‘SAML’, ‘LDAP’, and ‘OpenID’ Login policy.

Create New User

You can create new admin user from the Reset Admin User window. You need to select the Create New User option and click Create.
A confirmation dialog appears on the screen that 'Admin user has been created successfully'.
5 Update Date Selection in Service Console

Selecting Update Date

You can manage a schedule of quarterly Updates using the Service Console.

The option to select update date allows you to build a flexible schedule of quarterly Updates depending on your own preferences, business requirements, or any other reasons. In addition, you'll have more control over the instances because it is easy to make updates process much simpler and transparent.

Note: Currently, it's not possible to manage Service Updates using the Service Console.

The Update Process Rules

Some rules to keep in mind during the Update process.

- Oracle releases Updates four times a year. The Updates are available from the first Friday of each quarter in a year (in the months of Feb, May, Aug, and Nov).
- You can select any date within the quarterly Update period to schedule / re-schedule quarterly Updates for the respective Prod and Test instances. The quarterly Update period lasts for 60 days starting from the quarterly Update release date. Oracle manages the quarterly Updates for Test Preview instances and these cannot be configured.
- It's possible to pick update dates for four future GA updates. For example, if the current release is 19C, you can pick Update dates for 19D, 20A, 20B, and 20C.
- Oracle defines the number of updates and availability that can happen per day. The available dates are allotted on first come, first served basis.
- Based on the available capacity, Oracle reserves sufficient amount of time for preparations to the upcoming updates. The selected update date is locked down two days in advance. For example, if you schedule an update for today or tomorrow, you can't change this date. Today and tomorrow are locked down for scheduling of updates.
- Updates are performed during the standard 3-hours update window. You can specify an update window, which be applied to all the instances in your subscription. If you do not specify any update window, the default update window is applied depending on the geographical region in which the hosting takes place.
  - North America (NA) and Latin America (LATAM) – AMER : Friday, 21:00 CDT/CST
  - Europe and Africa - EMEA : Friday, 21:00 BST/GMT8
- Update selection is not available in the following cases:
  - If you have Oracle maintained extension
If you don't have access to your Oracle Field Service Cloud instances from the Cloud Portal
- Oracle reserves the right to cancel an update if the conditions are not optimal. In such a case, you’ll be notified to select a different date.

How to Pick Update Date

You can manage a schedule for quarterly Updates from the Update Schedule tab select the update dates for any of the quarterly Updates ahead.

The Service Console allows you to schedule the updates one by one by selecting dates of quarterly Updates for the displayed instances.

To schedule the updates, click Select for a particular update and a particular instance and pick any of available dates from the calendar. To re-schedule an update, click on a date, which is represented as a link, and select a different date from the calendar.

Completed updates appear as green check boxes and these updates can't be rescheduled. You can pick update dates for all the instances except the Test preview instance, which is managed by Oracle.

Default Update Schedule

Oracle defined a default update schedule and the same schedule is applied to all your instances. In case, you don't want to choose the default schedule, you can use the pick update date option.
Here's the default schedule:

- 1st Friday of a quarter (in the months of Feb, May, Aug, and Nov) - Test Preview instance
- 3rd Friday of a quarter (in the months of Feb, May, Aug, and Nov) - Prod instance
- 4th Friday of a quarter (in the months of Feb, May, Aug, and Nov) - remaining Test instances

Update Scheduling Best Practices

- Plan the timing of your Prod and remaining Test instances to ensure your update is like-for-like.
- Allocate a sufficient amount of time to review and validate the new quarterly Update. We do not recommend continually shifting and pushing the Update out to the last available days since these days might be already fully booked by customers.

Configure the Update Window

The **Update Window** is a standard three hour duration allocated for execution of updates, which you can configure in the Service Console.

Update Window Best Practices

Configure the update window outside of the organization's standard business hours.

Follow these steps to Configure Update Window:

1. Click **Modify** in the **Update Time** section.
   - The Setup Update Window dialog appears on the screen.
2. From the **Update Window Start** drop-down list, select the time at which you want to start the update window.
3. Select the required time zone from the Time Zone drop-down list and click **Save**.

View Request History

The **Requests History** screen provides the historical data of requests made from the Service Console.

Using this information, you'll know the requested operations, the requestor, and the request time. As of now, only Update was scheduled and Update was rescheduled operations are recorded in the Request History.

Follow these steps to view request history:

- Navigate to the **Available Instances** Available Instances tab and select **Request History** menu item for any of the instances.

You can access the history of requests displayed in the ‘from newest – to oldest’ order. Each record on this screen represents a specific operation requested from Service Console for this particular instance.
6 Instance Re-creation

About Re-creating an Instance

You can re-create an instance by replacing the existing data of your Oracle Field Service Cloud instance with data from another instance.

Alternatively, you can re-create the instance by changing the instance state to ‘newly-provisioned’ state.

You’ll find the **Recreate Instance** option present in the menu for every instance. In case of Test instances, you’ll find this option always available.

The **Recreate Instance** option is available only from the 19C version or later.

**Note:** In case of a Production instance, the **Recreate Instance** option is shown until the instance is switched to ‘Go-Live’ mode. Once the Production instance is in ‘Go-Live’ mode, you can’t view this option and you’ll only be able to copy configurations with or without data from Production to TEST instances, but not from TEST to Production.

How to Re-create an Instance

You can use either of the following two options to re-create an instance:

- **Start Over** — To start configuring the instance over again
- **Recreate From Another Instance** — You need to select a source instance, the data, and version for this operation

The Start Over Option

With this option, you’ll re-create your instance with the default settings.

Once you click **Continue** after selecting the **Start Over** option, you’ll see the Confirmation screen.
Recreate From Another Instance Option

You can re-create an instance from another instance using the **Recreate From Another Instance** option.

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**Note:** You should have the admin rights to configure an instance. If you don’t have the admin rights, you can create an admin user using the **Reset Admin User** option.
You’ll have to provide some details about the other instance:

- **Source Instance** — This drop down list has the instances belonging to your subscription. You can select the required instance from this option.
- **Data to copy** — This drop down list has the following options:
  - Configuration
  - Configuration and data for future
  - Configuration, data for future and 7 days from the past

Some configuration elements are included in the copying process when you select the **Recreate From Another Instance** option.

<table>
<thead>
<tr>
<th>Activity Types</th>
<th>Applications</th>
<th>Business Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capacity Categories</td>
<td>Collaboration / Helpdesk groups and their members</td>
<td>Company Settings</td>
</tr>
<tr>
<td>Daily Extract, BICS / DbaaS Configuration</td>
<td>Dashboards (both Reports and Dashboards)</td>
<td>Display</td>
</tr>
<tr>
<td>Filters</td>
<td>Forms and Plugins</td>
<td>Geocoding Configuration</td>
</tr>
<tr>
<td>Glossary</td>
<td>Holidays</td>
<td>Inventory Types</td>
</tr>
<tr>
<td>Link Templates</td>
<td>Login Policies</td>
<td>Message Scenarios</td>
</tr>
<tr>
<td>Oracle Knowledge</td>
<td>Organizations</td>
<td>Properties</td>
</tr>
</tbody>
</table>
In addition to the above configuration elements, the following data will be copied when you select the **Recreate From Another Instance** with **data for future** or **data for future and 7 days from the past** option:

- Activities
- Inventory
- Quota (quota values)
- Statistics Parameters (only configuration of parameters; no actual statistical data)
- Service requests

**Note:** Customer information like phone numbers, emails, etc. will be copied during the data copy process. So, you need to be very careful if message scenarios use this information and contact customers accidentally from your TEST instance copies from Production or other TEST instances.

The following data won't be copied for any type of operation:

<table>
<thead>
<tr>
<th>Certificates (uploaded for SAML &amp; Open ID login policies and Applications)</th>
<th>Collaboration chats</th>
<th>Daily extract archives</th>
</tr>
</thead>
<tbody>
<tr>
<td>BICS / DBaaS / OAC real time data</td>
<td>GPS tracks / positions</td>
<td>Files (images, file attachments, signatures, and user avatars)</td>
</tr>
<tr>
<td>History (activity, resource, and inventory)</td>
<td>Logs</td>
<td>Messages</td>
</tr>
<tr>
<td>Plug-ins credentials (credentials should be manually re-configured)</td>
<td>Work zone shapes</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** You can select the **Configuration** option only when re-creating the production instance.

- Version — You can't view this field when versions of both instances are same. In addition, it won't be possible to copy the version from source instance when re-creating the 'Test preview' instance.
After selecting the required options, click **Continue**. A confirmation window appears on the screen. Click **Recreate** to continue with your selection or click **Back** to change your selection.

**Note:** You can request **Start Over** for a specific instance any number of times. However, you can request to Recreate from Another Instance for any instance only one time a day. If you re-create an instance using the **Recreate From Another Instance** option, it takes more time to process the data.

For example, you have three TEST instances – Test1, Test2, and Test3. You request a Re-create of Test2 from Test1, which means you can't request a Re-create of Test2 in the same day. However, you can request for a Re-create of Test3 from Test2.

### Re-creating Instance Operation Incomplete

In general, it could take up to twenty-four (24) hours after your request to complete the re-create instance operation. However, if the operation can't be completed within twenty-four hours of the request, it will be skipped and you'll have to create a new request. You'll notice a message displayed on the main screen of Service console if the operation is not completed within the time.

![Recreate was not completed]

**Instance recreation was not completed within 24 hours of the request and has been automatically skipped. Please try to recreate your instance again.**

### Data Management on Target Instance

#### Delivery Channels: Message Scenarios and Outbound Integration

The Delivery channels end points are preserved on the target instance at the beginning of re-create instance operation and restored upon completion of the operation. The system restores end points only for delivery channels that match between source and target instance (for example, same delivery channels on Production and Test).

For the delivery channels that don't match end point, they'll be deleted and you have to configure them again.

#### Applications

You will have to regenerate the Client ID and Client Secrets in the copy and configure the end points manually to enable communications.

#### Data Deletion

Once the operation is completed, all the data present on the target instance is deleted permanently without the possibility to restore it.
# Revision History

This document will continue to evolve as existing sections change and new information is added.

<table>
<thead>
<tr>
<th>Date</th>
<th>What's Changed</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 2019</td>
<td>The following topics are added:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Rename an Instance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Reset an Admin User</td>
<td></td>
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<tr>
<td></td>
<td>• Create New User</td>
<td></td>
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<tr>
<td>November 2018</td>
<td>The following topics are added:</td>
<td></td>
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<tr>
<td></td>
<td>• Using the Business Metrics</td>
<td></td>
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<tr>
<td></td>
<td>The following topics are updated:</td>
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<tr>
<td></td>
<td>• Using the Billing Metrics</td>
<td></td>
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<tr>
<td></td>
<td>• Resource Summary</td>
<td></td>
</tr>
<tr>
<td>May 2018</td>
<td>• New document for 18C</td>
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</tbody>
</table>