Oracle Fusion Field Service

Collaboration

Oracle Fusion Field Service
Collaboration

G45250-01

Authors: The Field Service Information Development Team

Contents

Preface

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

Using Oracle Applications

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we're working to remove insensitive terms from our products and documentation. We're also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Contacting Oracle

Access to Oracle Support

Customers can access electronic support through Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

Comments and Suggestions

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

- For web-based user guide, *Web-based User Guide Survey*
- For tutorial feedback, *Tutorial Survey*

1 Introduction to Collaboration

Overview

Collaboration in Oracle Fusion Field Service is the in-app communication hub that keeps your field teams connected and moving without switching tools. In a single workspace, you can coordinate in real time, hand off jobs and parts, escalate issues to the helpdesk, or pull in a supervisor for immediate support. Even video sessions happen inside the same flow, so work never stalls.

Business Benefits

For executives, the value is immediate and measurable. Decisions get made faster, costly delays are avoided, and service KPIs like First Time Fix, SLA compliance, and Mean-Time-to-Resolve improve. Every interaction, whether it's a broadcast, a chat, or a helpdesk escalation, is structured, auditable, and tied to the job at hand, giving you both accountability and customer trust.

Each role benefits directly:

- **Mobile workers:**
  - **On-the-go support:** Mobile workers receive real-time updates and can easily ask questions, share updates, and escalate issues while on-site, keeping work moving smoothly.
  - **Clear next steps:** Mobile workers can receive job information, resolve issues, and collaborate with colleagues all within a single interface.
  - **Remote expertise:** Initiating video calls with experts (using Zoom) for troubleshooting and complex repairs allows faster resolution without needing to be physically present.
- **Dispatchers and Supervisors:**
  - **Real-time coordination:** Dispatchers and supervisors can mobilize teams instantly, track job progress, and ensure that tasks are being completed on time.
  - **Instant updates:** Receive live updates on the progress of tasks, delivery/read acknowledgements, and operator availability.
  - **Efficient team management:** Monitor and assign jobs based on proximity, skillset, and availability, ensuring resources are allocated effectively.
- **Helpdesk Operators:**
  - **Streamlined support:** Helpdesk operators manage incoming service requests and track their resolution with clear ownership and escalation paths.
  - **Clear ownership:** With features like Take Chat, operators can assume responsibility for requests and quickly hand off unresolved issues to higher-tier support when necessary.
  - **Reduced interruptions:** Helpdesk staff can efficiently manage workload with structured queues and can toggle between statuses such as Away or Available to prevent service interruptions.
- **Operations Leaders/Administrators** track acknowledgments and outcomes, improving accountability and continuous improvement.

Altogether, Collaboration transforms scattered communications into a reliable, measurable service backbone that accelerates your operations.

Conversation Types

Collaboration supports different conversation types to match your operational needs:

- **1:1 chat:** Direct conversation between two users for private discussions.
- **Group chat:** Multi-user conversation where all participants can interact equally.
- **Conference:** Ad-hoc, many-to-many discussion, often including video or audio calls.
- **Broadcast:** One-to-many message sent to multiple recipients without expecting replies.
- **Helpdesk:** Structured conversation designed to submit, track, and resolve requests efficiently.

Core Actions

The core actions include the actions that you can perform within a Collaboration thread to communicate, share information, and coordinate activities. You can send messages, share files, start calls, manage participants, and transfer work - all in real time to keep your team aligned. These actions streamline communication, speed up decision-making, and improve overall team coordination, ultimately leading to faster resolution of issues and better service delivery.

Within any conversation, you can perform the following actions:

- **Send messages:** Communicate instantly with one or multiple users, reducing the need for emails or phone calls, and ensuring faster decision-making without delays.
- **Attach files:** Share documents, images, or other files within the thread, minimizing dependency on external channels and making information easily accessible for all team members.
- **Share activities or inventory:** Transfer work or resources directly to other users within the conversation, improving teamwork by allowing field users, dispatchers, supervisors, and helpdesk operators to collaborate in a unified workspace.
- **Add participants:** Include additional users into an ongoing chat or conference, enhancing team collaboration and ensuring that all necessary team members are aligned in real time.
- **Start calls:** Initiate voice, video, or Zoom meetings directly from the workspace, enabling quick and efficient communication that leads to faster problem resolution and ultimately better customer service.

User Roles and Permissions in Collaboration

Collaboration uses flexible access controls to ensure that every team member can collaborate effectively while maintaining security and operational discipline. Administrators define user types and permissions so that each role has the right level of access for their daily work.

User type permissions determine what each role can do in Collaboration. Depending on their configuration, users may be able to access the Collaboration workspace, start or join 1:1 or group chats, participate in conferences or broadcasts, share or transfer activities and inventory, send or respond to helpdesk requests, or configure and manage groups or helpdesks. These permissions are defined at the user type level to align with job responsibilities and organizational policies.

Each role plays a distinct part in the collaboration workflow:

- **Mobile Workers** access the Collaboration pane from the mobile or web app to chat with peers or dispatchers, share activity details or photos, and escalate issues without leaving the job screen. Their permissions remain streamlined to keep focus on field execution.
- **Dispatchers** coordinate activities across teams and units, initiate group conversations, monitor collaboration history tied to resources or activities, and serve as the first point for escalations. They typically have broad visibility to ensure smooth coordination.
- **Helpdesk Operators** handle structured queues, receive and resolve service requests, and transfer unresolved issues to supervisors or other operators. Their permissions are limited to managing helpdesk interactions and supporting field users in real time.
- **Supervisors** oversee daily operations, join conversations for guidance or oversight, and broadcast updates to field teams. They ensure that escalations are handled promptly and that communications stay clear and traceable.
- **Back-Office Employees** support field and helpdesk teams by sharing information, documentation, or resources as needed.
- **Administrators** configure Collaboration across the organization—enabling or disabling features, managing permissions, creating groups or helpdesks, and monitoring usage for compliance and optimization.

When setting up permissions, assign them based on responsibility, not individual preference. Keep field roles lightweight to avoid distraction, grant dispatchers and supervisors wider access for coordination, and reserve administrative privileges strictly for trained system administrators. This balance ensures secure, efficient communication while keeping every role focused on their core tasks.

The following table summarizes typical permissions by user role in Collaboration:

Feature / Action	Mobile Worker	Dispatcher / Supervisor	Helpdesk Operator	Administrator
Access Collaboration workspace	Yes	Yes	Yes	Yes
Start or join 1:1 chat	Yes	Yes	Yes	Yes
Start or join group chat / conference	Yes (limited to peers or assigned groups)	Yes	No	Yes
Send or receive broadcasts	Receive only	Send and receive	Receive only	Send and receive
Send or respond to helpdesk requests	Can submit requests	Can submit or escalate requests	Can respond and take chat	Can configure helpdesk setup
Share or transfer activities	Yes (own activities)	Yes	No	Yes
Share or transfer inventory	Yes	Yes	No	Yes
Add or invite participants to conversations	Yes (when enabled)	Yes	No	Yes
Start video (Zoom) sessions	Yes	Yes	No	Yes
View collaboration history	Yes (own threads)	Yes (team threads)	Yes (helpdesk threads)	Yes (full visibility)
Create or manage groups	No	No	No	Yes

Feature / Action	Mobile Worker	Dispatcher / Supervisor	Helpdesk Operator	Administrator
Create or manage helpdesk queues	No	No	No	Yes
Configure collaboration settings (permissions, notifications, visibility)	No	No	No	Yes
Monitor metrics or usage reports	No	Yes (team scope)	No	Yes (global scope)

Collaboration User Interface Elements

The Collaboration workspace in Oracle Fusion Field Service is a real-time, context-aware interface that centralizes all user communication and alerts.

The user interface is organized into tabs and panes to manage one-on-one chats, group messages, help desk activities, system broadcasts, and notifications seamlessly.

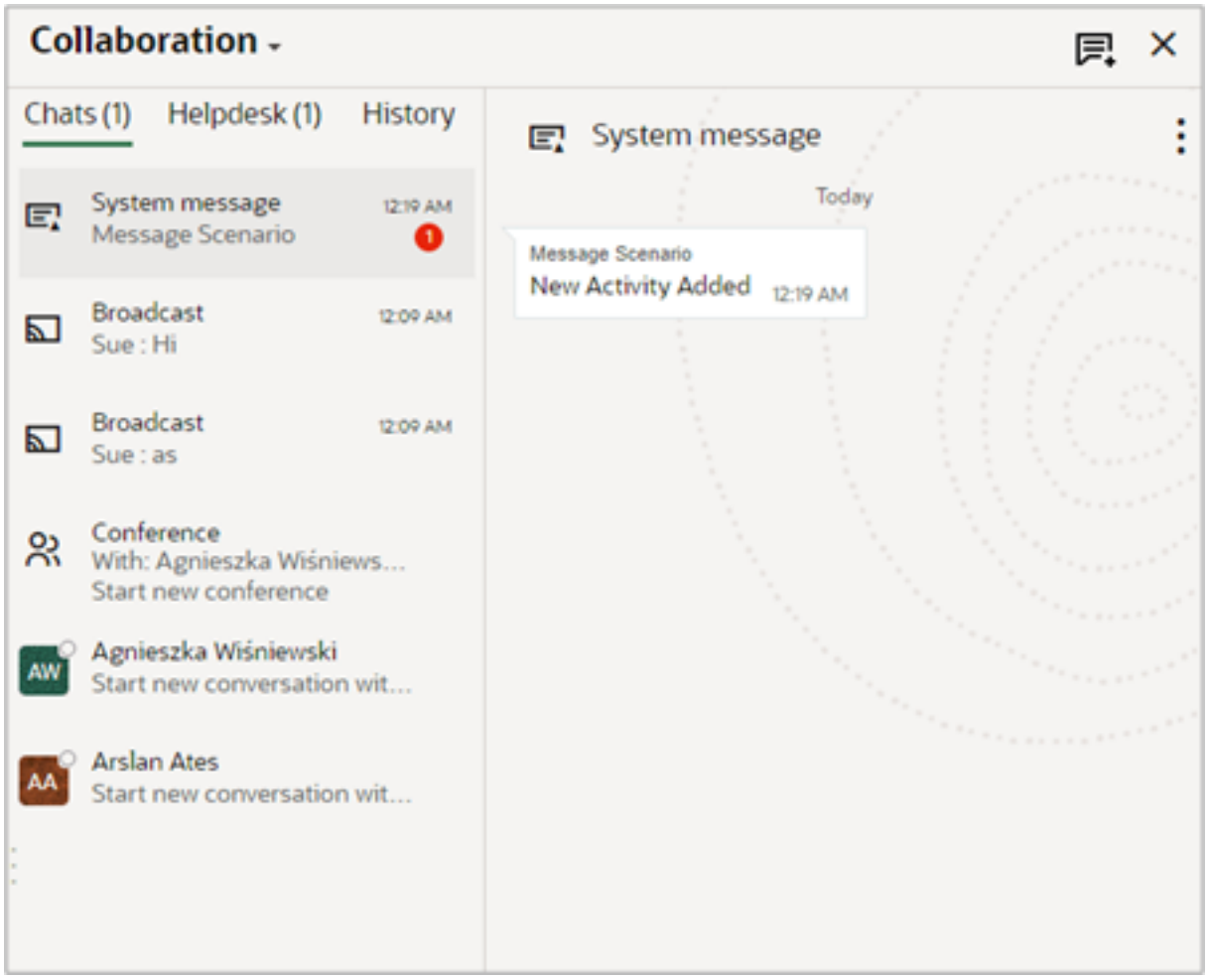
General Layout

The main elements of the Collaboration window include:

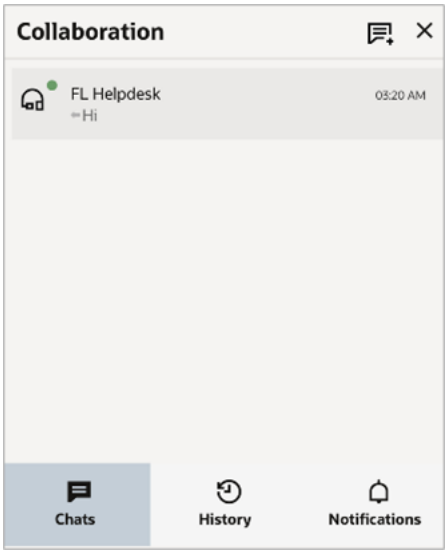
- **Header:** Displays the Collaboration ( ) icon with the count of new and unread messages. The header may also include quick-access tools such as a search icon, a chat bubble icon to open Collaboration, and a menu icon for navigation.
- **Navigation tabs:** Separate conversations into categories:
  - **Chats:** Lists active one-on-one and group conversations.
  - **Helpdesk:** Displays help desk tickets and conversations between users and support teams.
  - **History:** Provides a searchable log of past conversations and alerts.
  - **Notifications:** Shows system-generated alerts such as activity status updates or deletions. This tab is visible when there are active notifications.
- **Left pane:** Displays a list of active chats, help desks, broadcasts and system messages. Icons and user avatars help identify the communication type.
- **Right pane:** Displays the active conversation, including chat bubbles, message history, and message input fields.

> **Note:** The Oracle Fusion Field Service mobile app uses a page-based view and does not include a left or right pane split.

Web View:


Collaboration
Chats (1)
Helpdesk (1)
History
System message
Message Scenario
12:19 AM
1
Broadcast
Sue : Hi
12:09 AM
Broadcast
Sue : as
12:09 AM
Conference
With: Agnieszka Wiśniews...
Start new conference
AW
Agnieszka Wiśniewski
Start new conversation wit...
AA
Arslan Ates
Start new conversation wit...
System message
Today
Message Scenario
New Activity Added
12:19 AM

Mobile View:



Visual Indicators

The Collaboration workspace uses visual indicators to provide at-a-glance information about the status of chats, users, and broadcasts. These cues are designed to improve user experience by providing quick context without needing to open every conversation.

- **User avatars and status:** User avatars appear next to their names. An online user is indicated by a green dot, while an offline user has a gray outline and a white dot.
- **Icons for message types:** System messages, broadcasts, and help desks are each identified by a unique icon.
- **Unread message indicator:** Red count badges appear beside chat names or icons to indicate unread messages.
- **Timestamps:** Every message and chat item displays the time sent or received.

Interactive Features

In addition to the layout, the Collaboration window provides interactive tools that enhance communication and coordination:

- **Chat controls:** Options to manage conversations, including:
  - **New Conversation:** Starts a one-on-one or group chat.
  - **Start Video:** Initiates a video call with a resource.
  - **Add User:** Adds more participants to an existing chat.
- **Sharing capabilities:** Users can share application data directly within the chat, including:
  - **Images:** Supports preview, zoom, and rotation.
  - **Activities:** Enables sharing and transferring activity details.

    - **Inventory:** Allows sharing or transferring inventory item information.
- **Message window:** Supports expanding messages for easier reading and includes hyperlink support.

Device Variations

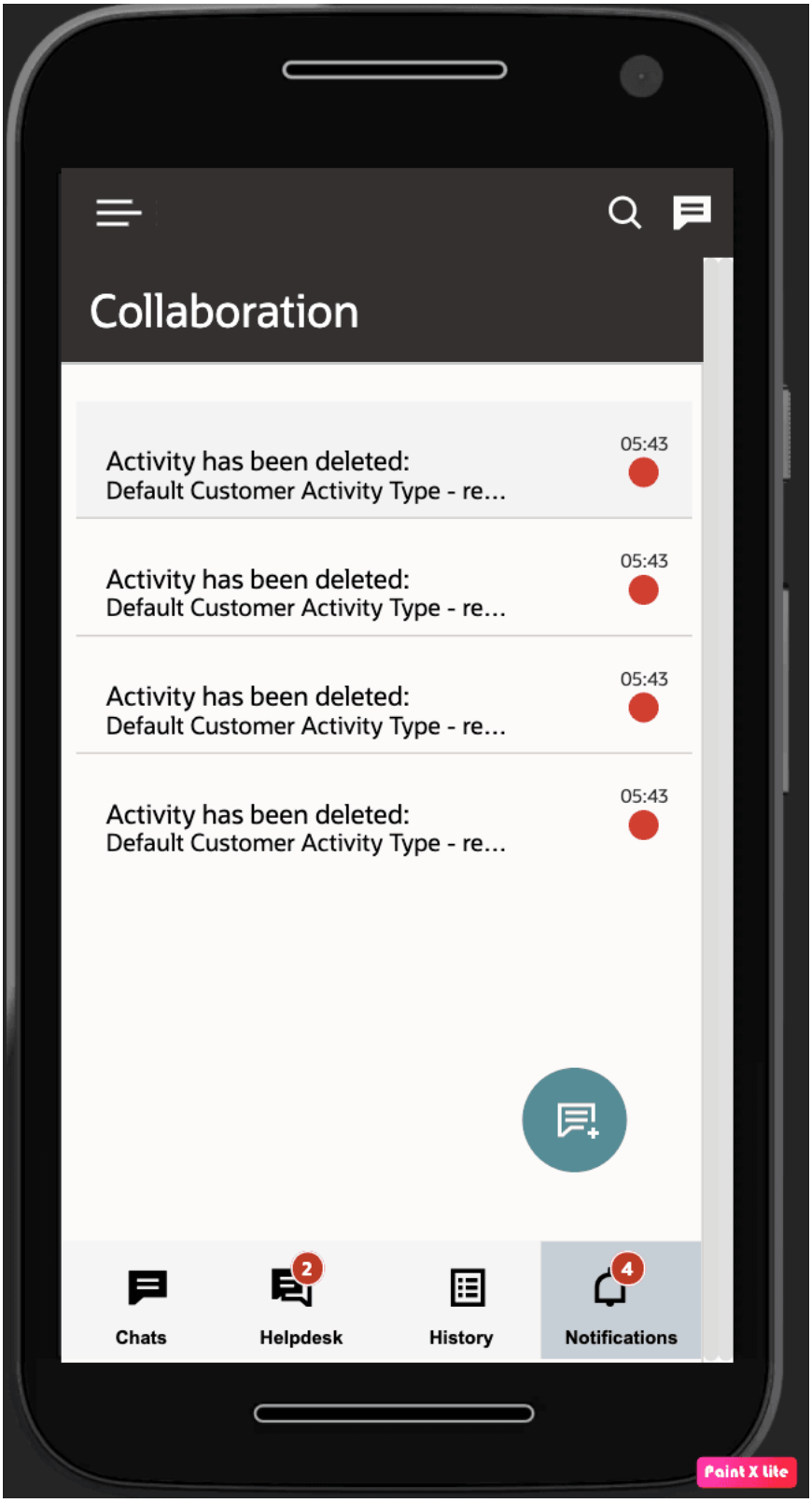
The Collaboration interface provides a consistent user experience across both web and mobile applications, with layout adjustments optimized for device type.

Web Interface: The web interface uses a split-pane layout, showing the list of conversations on the left and the activie conversation on the right.

Mobile App Layout: The Oracle Fusion Field Service mobile app uses a page-based view with a bottom navigation bar for easy access to Collaboration features. Each tab includes a red badge indicator showing the number of unread items. The mobile layout also includes:

- **Floating Action Button:** Allows users to quickly start a new chat or broadcast.
- **Header Tools:** A menu icon for navigation, a search icon to find conversations, and a chat bubble icon to access Collaboration.

Notifications appear as a list with timestamps and unread markers, enabling users to review system alerts efficiently.


Collaboration
Activity has been deleted:
Default Customer Activity Type - re...
05:43
Activity has been deleted:
Default Customer Activity Type - re...
05:43
Activity has been deleted:
Default Customer Activity Type - re...
05:43
Activity has been deleted:
Default Customer Activity Type - re...
05:43
2
4
Chats
Helpdesk
History
Notifications
Paint X lite

The Collaboration workspace in Oracle Fusion Field Service provides an integrated communication hub for all user types – mobile workers, dispatchers, supervisors, managers, and administrators. Whether accessed from the web or mobile, its intuitive layout, visual indicators, and context aware features ensure that users can stay connected, informed, and productive.

2 Configure Collaboration

Enable Collaboration Permissions for User Types

As an administrator, to enable Collaboration permissions in Oracle Fusion Field Service, you must configure permissions at the user type level, create collaboration groups or help desks, and then assign users to collaboration groups or help desks.

You can control specific actions that users within a particular type can perform using the Collaboration:

1. Go to **Navigation Menu** > **Configuration** > **User Types**.
2. Select a **User Type** and enable the following **Collaboration** permissions as required:
    - **Collaboration:** Enables the user type to access the Collaboration workspace, initiate and participate in chats, view broadcasts, and receive system messages.
    - **Activity Move via Chat:** Allows the user to share and transfer activity details directly within the chat window, enabling seamless coordination and handoff between team members.
    - **Inventory Move via Chat:** Allows the user to share and transfer inventory items through chat, ensuring real-time visibility of parts and materials across resources.
    - **File Sharing via Chat:** Enables the user to share files and images within the chat conversation, supporting image preview, download, and contextual collaboration.
    - **Initiation of Video Call:** Enables the user type to start video calls with other users to resolve issues or discuss updates in real time.
    - **Allow initiation of Zoom meetings:** Enables the user type to start Zoom meetings if the Zoom integration is configured.
    - **Allow initiation of chat with all visible resources:** Allows the user type to start chats with any visible resource in the organization, including those outside their immediate team.
3. Click **Update** to save the changes.

Configure Collaboration Groups and Helpdesks

After enabling collaboration permissions for a user type, you must configure collaboration groups to define with whom they can interact:

1. Go to **Navigation Menu** > **Configuration** > **Collaboration**.
2. Click the **Add new group** icon.
3. Specify the following and **Save**:
    - **Name:** Specify a name for the group or helpdesk you're creating.
    - **Type:** Select whether you're creating a group or helpdesk.
    - **Active:** Select to enable the group or helpdesk by default.
    - **Allow chat between members of this group:** Applicable only if you're creating a group. Specifies whether to allow users in this group to search for other members or start chats. By default, this option is selected. Deselect it to prevent users in this group from searching for other members or starting chats.

However, they can still search for and start chats through other configurations — for example, if they belong to another group with this option enabled or have visibility based on the Collaboration with Groups configuration.

- **Description:** Add a brief description of the group or helpdesk you're creating.
- **Enable Oracle Digital Assistant:** Applicable only if you're creating a helpdesk. Oracle Digital Assistant acts as a virtual operator in the helpdesk and can answer mobile workers' queries. You must have a valid subscription to the Oracle Digital Assistant service, for example Oracle Digital Assistant Platform for SaaS.
- **Collaboration with groups:** Grant specific user groups and helpdesks permission to communicate and share information with other groups and helpdesks.
- **Assisting Helpdesks:** Select the helpdesks this group can contact for assistance.

Add Resources to Collaboration Groups

You must assign the users to a collaboration group to gain the permissions defined for that group:

1. Go to **Navigation Menu** > **Resources**.
2. Select a **User Type** and identify the user to add to collaboration group.
3. Search for and click the resource name.
4. Click **Information** on the resource details page.
5. In the **Collaboration Group** field select the available collaboration groups and click **Select**.
6. In the **Operator of Helpdesk** field select one or more helpdesks if the user has to act as operator for those helpdesks.
7. Click **Submit** to save the changes.

3 Start Conversations in Collaboration

Initiate a Chat in Collaboration

Before you can begin, your administrator must have already configured your user type and assigned you to a collaboration group or help desk. This ensures you have the necessary permissions and visibility to communicate with other users:

1. Signin to Oracle Fusion Field Service and tap the  icon that represents Collaboration.
    - In the web application, the icon appears in the top-right corner. In the mobile app, it is available on the main toolbar.
2. Click start chat () icon and choose to start a one-on-one or group chat.
3. Select a contact or group:
    - **One-on-one chat:** Use the Search field to find a specific user and select their name from the list.
    - **Group message:** Tap Group Message. You can select recipients from your Collaboration Groups or Visible Resources.
    - **Help desk:** For issues requiring help from a specific department, select the appropriate help desk from the list.
4. Send your message:
    - After selecting your contact or group, the chat window opens.
    - Type your message in the text box.
    - Press **Enter** or tap the **Send** icon to send your message.
5. When prompted, allow permissions for notifications and network access.

    Tip:
    - Enabling push notifications allows you to receive new Collaboration messages even when the app runs in the background.
    - Maintaining an active internet connection ensures that messages and job updates sync in real time.

6. Keep your mobile app up to date.

    Tip: Updating the app regularly ensures continued access to the latest Collaboration features and fixes.

4 Integration with Collaboration

Extend Collaboration

Collaboration in supports automation and extensibility:

- **Automation:** Use Message Scenarios to send read-only System Messages based on defined events such as new activity created or SLA at risk to specific users, groups, or helpdesks.
- **Oracle Digital Assistant:** Integrate for conversational automation, such as handling routine queries, sharing attachments to a chat, or transferring conversations to a human helpdesk operator when necessary.

API Reference

The Oracle Fusion Field Service Collaboration APIs are a set of endpoints that enable seamless collaboration between mobile workers, dispatchers, and other stakeholders within the application. They provide access to collaboration features such as real-time chat, sharing information about activities, and notifications to enhance communication and coordination in the field. You must *Create REST API Application* to use *Collaboration APIs*.

Create REST API Application

Before using the Collaboration APIs, you must create an application in Oracle Fusion Field Service. Creating an application generates the required Client ID and Client Secret, which are used to obtain an access token for authenticating API requests. This setup ensures that all API interactions with the Collaboration are secure and authorized. For more information, see *Create an Application*.

Use Collaboration APIs

The Collaboration APIs enable developers to integrate and manage real-time communication features within Oracle Fusion Field Service Collaboration. These APIs support key operations such as starting new chats, sending and retrieving messages, managing participants, and accessing address book information. Together, they provide a comprehensive interface for building and maintaining chat-based collaboration between users, helpdesk teams, and field resources. You can perform the following core actions in Collaboration using APIs:

- **Get Address Book:** Retrieves a paginated list of contacts from the address book in Collaboration. The response is returned in JSON format and includes contact details, pagination links, limit, offset, and total results. Query parameters can be used to control the number of items retrieved and the starting index for the response.

  HTTP Method: `GET`

  Endpoint: `/rest/ofscCollaboration/v1/addressBook`

For more information, see *Address Book REST Endpoints* and *Get address book*.

- **Get Messages:** Retrieves all messages for a specified chat ID in Collaboration. It returns message details in JSON format, including direction, limit, offset, pagination links, and total results. The API supports sorting messages in ascending or descending order.

  HTTP Method: `GET`

  Endpoint: `/rest/ofscCollaboration/v1/chats/{chatId}/messages`

  For more information, see *Chats REST Endpoints* and *Get messages*.

- **Get Participants:** Retrieves a list of participants for a specified chat in Collaboration. The response, returned in JSON format, includes participant details such as name, login, presence, and invitation information. The API supports pagination through limit and offset parameters, with a maximum of 100 participants returned per request.

  HTTP Method: `GET`

  Endpoint: `/rest/ofscCollaboration/v1/chats/{chatId}/participants`

  For more information, see *Chats REST Endpoints* and *Get participants* .

- **Invite a Participant:** Adds a user to an existing chat in Collaboration. This operation allows users to extend a one-on-one chat into a group or conference chat by inviting additional participants. The request requires the chat ID and the login of the participant to be invited, and a successful operation returns an HTTP 204 response indicating completion without content.

  HTTP Method: `POST`

  Endpoint: `/rest/ofscCollaboration/v1/chats/{chatId}/participants/invite`

  For more information, see *Chats REST Endpoints* and *Invite a participant* .

- **Leave a Chat:** Allows a user to exit an existing chat in Collaboration. The request requires the chat ID and an empty JSON object as the body. A successful operation returns an HTTP 204 response, indicating that the user has left the chat successfully.

  HTTP Method: `POST`

  Endpoint: `rest/ofscCollaboration/v1/chats/{chatId}/leave`

  For more information, see *Chats REST Endpoints* and *Leave a chat*.

- **Send a Message:** Sends a text message or attachment to an existing chat in Collaboration. The request requires the chat ID and message content in JSON format. A successful operation returns an HTTP 201 response with message details, including the author, message ID, sequence number, and timestamp.

  HTTP Method: `POST`

  Endpoint: `/rest/ofscCollaboration/v1/chats/{chatId}/messages`

  For more information, see *Chats REST Endpoints* and *Send a message*.

- **Start a New Chat:** Creates a new chat in Collaboration. This operation allows users to start a one-on-one chat, initiate a helpdesk chat, or create a conference chat with multiple participants. The request includes the message content, recipients, and optional attachments. A successful operation returns an HTTP 201 response with the details of the newly created chat, including the chat ID, type, participants, and start time.

HTTP Method: `POST`

Endpoint: `/rest/ofscCollaboration/v1/chats`

For more information, see *Chats REST Endpoints* and *Start a new chat*.

5 Use Cases for Collaboration

Operational Scenarios with Collaboration

Collaboration supports a variety of operational scenarios across the field service landscape. Here are some examples:

- **Planned Coordination - Daily Stand-ups and Shift Handoffs**

  A supervisor schedules a daily stand-up with 500+ mobile workers through Collaboration. Participants receive invites, confirm attendance, and share updates in real time. For shift handoffs, open requests are transferred seamlessly with preserved context and audit trails.

  Benefit: Reduces handoff errors and builds team rhythm.
- **Urgent Response - Outage and Safety Alerts**

  A dispatcher sends a Broadcast to 5,000 mobile workers during a power outage. Recipients acknowledge the message, and supervisors monitor the acknowledgment rates. Simultaneously, a Conference is launched to coordinate restoration efforts.

  Benefit: Mobilizes the right workforce instantly and accelerates incident recovery.
- **Escalated Support - Tier-2 Assistance through Helpdesk**

  A mobile worker encounters an issue, opens a Helpdesk request, and escalates it to Tier-2 support. The full chat history and attachments are retained for compliance.

  Benefit: Reduces dispatcher interruptions and ensures structured escalation.
- **On-the-Job Handoffs - Activities and Parts Transfer**

  A mobile worker shares an activity with a colleague using in case of emergency using chat, ensuring the customer experiences no delays. The audit trail ensures accountability.

  Benefit: Protects SLAs, improves First-Time-Fix, and minimizes repeat visits.
- **Proactive Alerts - SLA Risk Notifications**

  When an SLA threshold is breached, an automatic message alerts dispatchers and mobile worker. The Helpdesk is notified for manual intervention.

  Benefit: Prevents SLA violations by surfacing risks early.
- **Remote Expert Assist - Video Collaboration**

  A mobile worker initiates a Zoom session for a complex repair, connecting with an SME for remote assistance.

  Benefit: Reduces travel costs and improves customer experience.

These scenarios demonstrate how different user roles leverage Collaboration to streamline operations, improve accountability, and drive efficiency.

6 Revision History

Revision History

Date	What's Changed	Notes
October 2025	Initial release	