Oracle Fusion Field Service

Getting Started with Oracle Fusion Field Service in Fusion Applications

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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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1 Introduction

About this Document

This document is for the personnel who are responsible for setting up the application and implementing Oracle Fusion Field Service based on their company's specific business requirements. It's designed to help implementers get set up in Fusion, specifically regarding security and Oracle Fusion Field Service resource and user management.

If a company has already implemented other Oracle Fusion Applications, then some details contained in screens covered here might already be populated. If a company is new to Fusion Applications, then it's recommended to become familiar with the *Implementing Applications* guide, as it contains comprehensive explanations of all the enterprise-level considerations when entering Company Profile details. This document doesn't duplicate that content, but instead focuses on areas that directly impact Users and Security tasks that are necessary for implementing Oracle Fusion Field Service.

This document includes the setup details through the Manage Users task within Fusion Applications. To complete the remaining Oracle Fusion Field Service User Interface configuration, go to **Navigator > Field Service > Field Service > Configuration**. For more information about this configuration, see the *Administering Oracle Fusion Field Service* guide.

Oracle Fusion Field Service Initial Setup Overview

Oracle Fusion Field Service is part of the Oracle Fusion Applications family. This means that you get standardized application configuration and setup experience across all the Oracle Fusion Applications that you implement. For example, the initial setup details such as users and user roles created for one Fusion Application can be easily shared where needed.

This document explains how to initially set up Oracle Fusion Field Service, with a focus on security, user, and resource management. It guides you through the setup process using the Manage Users task. Some information might already be set up if a company uses other Oracle Fusion Applications.

If you've implemented Oracle HCM: Create user accounts using the **Hire an Employee** task. For more information on how to perform the task, see: the *Oracle Human Resources documents*.

If you're new to Fusion Applications: Use the **Manage Users** task, covered in this guide. See the Implementing Applications guide for details on setting up your Company Profile and other key information. In the *Oracle Fusion Cloud Applications Suite*, navigate to Common Books for the latest version of this guide.

To complete the remaining Oracle Fusion Field Service User Interface configuration, go to **Navigator > Field Service > Field Service > Configuration**. For more information on this configuration, see the *Administering Oracle Fusion Field Service* guide.

2 Before you Begin

Enable Field Service Offering

When you buy a subscription for Oracle Fusion Field Service, Oracle sends a Welcome email to the primary account administrator. This user can either perform the steps themselves or create another user to manage that process. The user performing these steps must have the 'ASM_CONFIGURE_OFFERING_PRIV' privilege, which is typically assigned to the primary account administrator by default.

Before you start configuring Oracle Fusion Field Service, ensure that these prerequisites are completed:

- In the Cloud Console, your tenancy administrator must add the Oracle Fusion Field Service subscription to an existing environment family, as described in the *To add new application subscriptions* topic in the Oracle Cloud Infrastructure documentation.
- You must enable the Field Service offering using Oracle Functional Setup Manager.

To enable the Field Service offering:

1. Sign in using the credentials you've received in the Welcome email.
2. Go to **Navigator** > **My Enterprise** > **Offerings**.
3. On the **Offerings** page, select the Field Service offering.

   If you don't have access to the **Offerings** page, contact Oracle Support to verify that the 'ASM_CONFIGURE_OFFERING_PRIV' privilege is assigned to your user record through the Security Console.
4. Click **Opt In Features**.
5. Select the checkbox in the **Enable** column.
6. On the **Opt In** page, click **Done**.

   The Field Service offering is now enabled and you return to the **Offerings** page.

Access the Functional Areas

Functional areas define key details of your organization such as the legal address, roles, and privileges required to use the offering. You must configure the Company Profile and the Users and Security functional areas that are available in the Setup and Maintenance work area, including the related tasks. When you select a functional area, its associated tasks are listed. While you're required complete certain tasks, it's important to understand the optional tasks as well. This document covers all tasks, indicating which are required and which are optional.

To access the Oracle Fusion Field Service Functional Area tasks:

1. Sign in to Fusion Applications and go to **Navigator** > **My Enterprise** > **Setup and Maintenance**.
2. Ensure that **Field Service** is selected within the **Setup** field in the header.

   The Company Profile and Users and Security functional areas are displayed.
3. If you're setting up this offering for the first time, select each functional area in the order it's listed. If you're changing the existing data, select the relevant functional area. If a functional area has required tasks, then only those are

displayed by default. If all tasks are optional, then all tasks are shown. To see both required and optional tasks, select **All Tasks** from the **Show** list.

4. Enter the necessary data. When finished, close the page to return to the setup task list.
5. Continue selecting and completing the tasks from the list as needed.

   Your Fusion user account needs the 'ORA_ASM_FUNCTIONAL_SETUPS_USER_ABSTRACT' role assigned to it to complete these tasks.

   Each task is covered in detail in the next chapter.

3 Configure Company Profile Tasks

Configure Company Profile

Now that you've access to the Functional Areas, start with the Company Profile configuration. While this document gives a brief overview of each Company Profile task, you can find detailed descriptions in the: *Oracle Fusion Cloud Applications* suite.

These tasks might already be set up if you're using other Fusion Applications. Even so, it's a good idea to check them here to make sure the information is correct.

To set up or verify your Company Profile, complete these tasks in the order shown below, as each screen uses information from the previous one:

- *Manage Enterprise HCM Information*
- *Manage Legal Address*
- *Manage Legal Entity*
- *Manage Locations*
- *Manage Business Units*

Manage Enterprise HCM Information

The **Manage Enterprise HCM Information** task lets you set or verify default settings for your enterprise, such as the employment model and worker number generation.

If you aren't implementing Oracle Fusion Human Capital Management (HCM): You only need to verify the enterprise name, and make sure that the selections in the **User and Role Provisioning Information** section are correct. The other settings on this page aren't relevant for now.

If you're using or are planning to use HCM: For more information on all parameters, see the Implementing Applications guide available in Common Books at *Oracle Fusion Cloud Applications Suite*.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Company Profile**

To verify or update **Enterprise HCM Information**:

1. Click **Manage Enterprise HCM Information** from the task list. On the **Enterprise** page, click **Edit**, **Update** or **Correct** as appropriate.
2. Verify that your Enterprise name is correct in the **Name** field. (For example, Supremo Fitness or Supremo Corporation.)
3. Scroll to the **User and Role Provisioning Information** section.

   These parameters control the default management of some user account features.

a. **User Account Creation:** Select how you want user accounts to be managed.
    - Select **Party users** for only Oracle Fusion Field Service.
    - Select **Both person and party users** if you plan to use Oracle Fusion HCM and Oracle Fusion Field Service. This is the recommended option that ensures that a user account is created whenever you create either a person user or a party user.

b. **User Account Role Provisioning:** Here, select how you want user roles to be provisioned by default. Select **Both person and party users**.

    This way, roles are provisioned whenever a user account is created for a person or a party user. When a user account exists, users both get and lose roles as specified by current role-provisioning rules. For example, managers might provision roles to users manually, and the termination process might remove roles from users automatically.

    > **Note:** User accounts without roles are suspended by default. Assigning roles directly in the Security Console isn't affected by this option.

c. **User Account Maintenance:** Select whether user accounts are suspended or reactivated automatically when users are terminated or rehired. Select **Both person and party users** (recommended).

4. After verifying these settings, click **Save and Close** or **Done** to return to the **Company Profile** task list.

    For more information about User and Role-Provisioning Information see the Securing Applications guide in the Common Books section in: *Oracle Fusion Cloud Applications Suite*.

Manage Legal Address

A legal address is the official mailing address used by a legal entity for billing, invoicing, correspondence, and registration with authorities. You need to define your legal address here, as it will be used in the next step, *Manage Legal Entity*.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Company Profile**

To verify or add your legal address:

1. Click **Manage Legal Addresses**.
2. Search for an existing **Legal Address**.
    - If you find the correct address, click **Cancel** to return to the **Functional Areas** task list.
    - If you need to create a new address, click **Create** and enter the legal address details.
3. Click **Save and Close** (or **Cancel** if you don't want to save) and return to the **Functional Areas** task list.

Manage Legal Entity

A legal entity is a registered company or an organization recognized by law. Each legal entity can serve as a legal employer, which is required when creating users such as Field Service Mobile Workers or Field Service Managers. You must define at least one legal entity as a legal employer.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Company Profile**

To verify or create a legal entity:

1. Click **Manage Legal Entity**.
2. Select **Search Legal Entities**, then click **Apply and Go to Task**. Review the list of legal entities or search for a specific one to verify that it exists.
3. To create a legal entity, click **Create** and complete these required fields:
    a. **Country:** Country where the legal entity is found. This selection decides the applicable registration information.
    b. **Name:** Legal name as registered with the government. (For example, Supremo Fitness Corporation.)
    c. **Legal Entity Identifier:** Unique code for the legal entity.
    d. **Identifying Jurisdiction:** Main juridiction where the business is registered.
    e. **Legal Address:** The address for the legal entity that you verified or created in the *Manage Legal Address* step.
    f. **EIN or TIN:** For US entities, enter the Employer Identification Number; for other countries, this field adjusts to your country's required information.
    g. **Legal Reporting Unit Registration Number**
4. Optionally, if the entity reports payroll tax and social insurance, select the **Payroll statutory unit** checkbox. (This setting applies to Fusion Global Payroll users.).
5. Ensure to select the **Legal employer** checkbox for at least one legal entity.

   This is required when you create users.
6. Click **Save and Close** or **Done** to return to the **Functional Areas** task list.

   For more information about setting up legal addresses and/or entities or setting up other modules, see the Implementing Applications guide available in the Common Books section in *Oracle Fusion Cloud Applications Suite*.

Manage Locations

A location identifies the physical address for parts of your organization, such as departments, jobs, business units, or even external organizations like contractors.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Company Profile**

To verify or create a location:

1. Click **Manage Locations**.
2. Search to see if the location you need exists:
   - If it does, you can simply review and confirm its details.
   - If you do need to add a new location, then click **Create**. (For example, add the Miami, Florida location for Supremo Fitness.)
3. Complete the required fields for the new location:
   a. **Effective Start Date:** Select the date from which the location is being used.
   b. **Location Set:** Select the Location Set that matches with the business unit. Only users in a business unit can access its locations. To make a location available to everyone in your company, choose the Common Set instead. Users can see the locations for their business unit in the Common Set when searching.
   c. **Name:** Enter the name of the location. (For example, Supremo Fitness - Miami).
   d. **Code:** Enter a unique code for the location. (For example, SUPR_FL01.)
   e. **Status:** Select the status of the location. For example, select Active if you intend to use the location immediately.
   f. **Main Address:** Enter the full physical address of the new location.
4. Click **Save**, then **Submit** and finally **Done** to return to the **Functional Areas** task list.

   For more information about managing locations, see the Workforce Structure Locations topic within the Implementing Applications guice available in the Common Books section at *Oracle Fusion Cloud Applications Suite*.

Manage Business Units

A business unit is a part of your company where specific business activities happen, such as sales or support. Each business unit can work with multiple legal entities and is useful for reporting, data security, and sharing information. When you create users for Oracle Fusion Field Service, you must assign them to a business unit.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Company Profile**

To verify or add a business unit:

1. Click **Manage Business Unit**.
2. Search for the required business unit.
3. If you do need to add a new one, click **Create**. (For example, Supremo Fitness - Miami.)
4. Complete these required fields:
   a. **Name:** Enter the business unit name. (For example, Supremo Fitness - Miami.)
   b. **Default Set:** Select the location set used in the *Manage Locations* step (for example, Common Set), or create a new one for your business unit.
5. (Optional) Select a location from the available set.
6. (Optional) Assign a manager by searching for and selecting an existing user.
7. Click **Save and Close** or **Cancel** to return to the **Functional Areas** task list.

   This is the final step in validating and/or configuring the Company Profile **Functional Area** tasks.

   For more information about managing business units, see the Enterprise Structures topic within the Implementing Applications guide available in the Common Books section at *Oracle Fusion Cloud Applications Suite*.

4 Configure the Users and Security Tasks

Configure Users and Security

This chapter covers the next set of tasks: managing users, roles, and related security settings. Some tasks are required, while others are optional, but recommended for better understanding and configuration. Each task is explained in this guide, with a focus on settings that are essential for managing Oracle Fusion Field Service users and resources.

Initially, you must perform these tasks sequentially.

- *Run User and Roles Synchronization Process (Required)*
- *Manage Applications Security Preferences (Optional)*
- *Import Users and Roles into Application Security (Required)*
- *Import User Login History (Optional)*
- *Manage Job Roles (Optional)*
- *Run Resource Type Preparation Process for Field Service (Required)*
- *Manage Person Types (Optional)*
- *Manage Job (Optional)*
- *Manage Resource Roles (Required)*
- *Manage HCM Role Provisioning Rules (Required)*
- *Manage HCM Atom Feeds (Optional)*
- *Manage Internal Resource Organizations (Required)*
- *Manage Users*

This guide explains each task, focusing on settings that are required or important for user and resource management in Oracle Fusion Field Service. For more information on user management, see the Securing Applications guide available in the Common Books section in *Oracle Fusion Cloud Applications Suite*.

Run User and Roles Synchronization Process

The **Retrieve Latest LDAP Changes** process syncs users, roles, and role assignments between your LDAP directory and Oracle Fusion Applications. You must run this process once during initial setup. After the first run, synchronization happens automatically. It's also a best practice to run this process after each release update, or if you notice any issues with user or role data.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To run the User and Roles Synchronization process:

1. Click **Run User and Roles Synchronization Process**.

2. (Optional) To get a notification when the process is complete, select **Notify me when this process ends**.
3. Click **Submit** and then **OK** to return to the **Functional Areas** task list.
4. To schedule this process to run automatically after each release, click the **Advanced** tab after step 4 and select **Using a schedule**. Then set the dates and times that fit your update schedule.

Manage Applications Security Preferences

You can use the **Security Console** in Fusion Applications to manage security tasks such as creating user roles, setting up API authentication, managing certificates, and viewing security analytics. The Manage Applications Security Preferences task lets you review or adjust these security settings before creating users. This task is optional.

The **Manage Applications Security Preferences** task lets you configure any of these parameters before you start creating users in Oracle Fusion Applications, if necessary. The *Securing Applications* book mentioned at the beginning of this chapter contains all the details you might need or be interested in regarding the Security Console.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To manage security preferences:

1. If you don't see this task in the list, click **All Tasks**.
2. Click **Manage Applications Security Preferences**.
   The **Security Console** opens in a new browser window.
3. Navigate the **Security Console** to view or edit your security settings as needed.
4. When finished, close the **Security Console** window.
   For more information on the Security Console, see the Securing Applications guide available in the Common Books section in *Oracle Fusion Cloud Applications Suite*.

Import Users and Roles into Application Security

This task copies users, roles, privileges, and security policy data from your LDAP directory and other sources into Oracle Fusion Applications. Running this process keeps the **Security Console** data up-to-date and ensures reliable search results. It’s recommended to schedule this process to run daily.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To schedule and run the import process:

1. Click **Import Users and Roles into Application Security**.
2. Click **Advanced** and go to the **Schedule** tab.
3. Set **Run** to **Using a schedule**.
4. Set the **Frequency** to **Daily** and **Days Between Runs** to 1.

5. Enter the desired start and end dates and times. If you use auto-provisioning, be sure the start date for this process is after the **Send Pending LDAP Requests** process completes.
6. (Optional) Select **Notify me when this process ends** to receive a notification when the process completes.
7. Click **Submit**.
8. Click **OK** to confirm and return to the **Functional Areas** task list.

Import User Login History

This task is to import user access information into Oracle Fusion Applications. The data is needed to generate the Inactive Users Report, which helps you track users who have been inactive for a specified period. To keep the report current, the best practice is to schedule this process to run daily. This task is optional.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To import user login history:

1. If you don't see this task, click **All Tasks**.
2. Click **Import User Login History**.
3. Click **Advanced** and go to the **Schedule** tab.
4. Set **Run** to **Using a schedule**.
5. Set the **Frequency** to **Daily** and **Days Between Runs** to 1.
6. Enter the desired start and end dates and times.
7. (Optional) Select **Notify me when this process ends** to receive a notification when the process completes.
8. Click **Submit**.
9. Click **OK** to confirm and return to the **Functional Areas** task list.

Manage Job Roles

The Manage Job Roles task lets you view existing roles and add new ones (for example, “Field Service Routing Manager”). You can't change the predefined roles, but you can copy, change, and assign these new roles to users as needed. If the default roles meet your needs, you can skip this step. The job roles created here appear as options within the **Associated Job Role** field on the **Add or Edit User Type** page. The three default job roles - Field Service Mobile Worker, Field Service Manager, and Field Service Application Administrator are by default associated with the three default user types - Field Resource, Manager, and Administrator and can't be changed.

> **Tip:** Be sure to create any other job roles and user types you need and associate them before adding users who will be assigned to those roles.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To create a job role:

1. If you don't see this task, click **All Tasks**.
2. Click **Manage Job Roles**. The **Roles** tab of the **Security Console** opens within a new browser window.
3. To create a new role, click **Create Role** and complete these fields:
    - **Role Name**: Enter a display name. (For example, Routing Manager.)
    - **Role Code**: Enter a unique code. (For example, FFS_ROUTING_MANAGER_JOB.) Don't start with 'ORA_', as this prefix is reserved for roles predefined by Oracle.
    - **Role Category**: Choose a tag that describes the role's purpose, typically Field Service–Job Role. If you select a duty-role category, the role can't be assigned directly to users. Instead, include it in a job or abstract role, and assign that to users.

      You can't change the role category after creating a role.
4. Click **Next**.
5. To add the privileges, click **Add Function Security Policy**.
    a. Search for the required privileges or role. Enter at least three characters to search.
    b. Select a privilege or role and then click **Add Privilege to Role** or **Add Selected Privileges**. If you select a role, click **Add Selected Privileges** (for example, for a Routing Manager job role, adding individual privileges such as 'FFS_ACCESS_FIELD_SERVICE_MOBILE_APP_PRIV', 'FFS_MANAGE_ROUTING_PRIV' and 'FFS_ACCESS_FIELD_SERVICE_DISPATCH_CONSOLE_PRIV' might be appropriate).
6. Click **Next** through the remaining steps **Create Role: Data Security Policies, Create Role: Role Hierarchy, Create Role: Users and Summary** pages. This step is optional.
7. Click **Save and Close** to finish. Your new job role is now available for selection in the **Associated Job Role** field on the **Configuration** > **User Types** page in Oracle Fusion Field Service. When you create a new user and assign them this Routing Manager job role, they will have access to the Dispatch Console and Routing configuration pages, according to the privileges included in the role.

   For more information on user types maintenance, see the Configure User Types topic in the *Administering Oracle Field Service* guide.

   For more information on managing roles, see the Role Provisioning, Role Assignments, and Role Configuration topics of Securing Applications guide available in the Common Books section in *Oracle Fusion Cloud Applications* Suite.

   For more information on Role Types, see *Securing HCM*.

Mapping of Job Roles and Privileges

Job roles in Oracle Fusion Field Service control what users can do. Each job role includes certain privileges, grouped by duty roles, that decide access to areas such as the mobile app, Dispatch Console, or routing features.

Using Oracle Fusion Field Service as the context:

- **Privileges:** Allow access to various work areas such as, Dispatch Console, Map, Mobile App, Booking, Dashboards, and Routing. Privileges aren't directly assigned to users.
- **Duty Roles:** Logical collections of privileges grouped by job function (for example, Field Service Manager, Field Service Mobile Worker). Duty roles aren't assigned directly to users.

- **Job Roles:** Assigned directly to users, job roles can inherit duty roles and the privileges assigned directly to the job roles themselves. Job roles can also be auto-provisioned through HCM when a user is hired for a role.

There are three predefined job roles in Oracle Fusion Field Service. Each role inherits the appropriate privileges, ensuring that users assigned to these roles have all the access they need to perform their tasks.

Duty Role	Duty Role Code	Duty Role Description	Job Role	Job Role Code	Job Role Description
Field Service Application Administra	ORA_FFS_ FIELD_SERVICE_ APPLICATION_ ADMINISTRATOR_ DUTY	Individual responsible for the duty of configuring Oracle Fusion Field Service mobile application.	Field Service Application Administrator	ORA_FFS_ FIELD_SERVICE_ APPLICATION_ ADMINISTRATOR_JOB	Individual responsible for Oracle Fusion Field Service mobile app configuration.
Field Service Manager	ORA_FFS_FIELD_ SERVICE_MANAGER_ DUTY	Individual responsible for the duty of managing Oracle Fusion Field Servicee Mobile Workers.	Field Service Manager	ORA_FFS_FIELD_ SERVICE_MANAGER_ JOB	Manages Oracle Fusion Field Service Mobile Workers.
Field Service Mobile Worker	ORA_FFS_FIELD_ SERVICE_MOBILE_ WORKER_DUTY	Individual responsible for the duty of Oracle Fusion Field Service mobile worker.	Field Service Mobile Worker	ORA_FFS_FIELD_ SERVICE_MOBILE_ WORKER_JOB	Individual responsible for Oracle Fusion Field Service work.

Here's a list of the available Oracle Fusion Field Service privileges, along with the predefined duty or job roles that inherit or are assigned these privileges:

Privilege	Privilege Description	Assigned To
Access Oracle Fusion Field Service Mobile Application	Allows the user to access the Field Service mobile app.	◦ Field Service Mobile Worker Duty Role ◦ Field Service Manager Duty Role
Manage Oracle Fusion Field Service Activities	Allows the user to manage and monitor activities performed by field resources.	Field Service Manager Duty Role
Access Oracle Fusion Field Service Map for Group of Resources	Allows the user to manage and monitor activities performed by field resources using a map.	Field Service Manager Duty Role
Access Oracle Fusion Field Service Dispatch Console	Allows the user to access the Dispatch Console and monitor activities performed by field resources at the organization level or within a large work area.	Field Service Manager Duty Role
Manage Resource Information	Allows the user to manage Field Service resource information.	Field Service Manager Duty Role
Manage Resource Schedules	Allows the user to manage working and non-working schedules of Field Service resources.	Field Service Manager Duty Role

Manage Booking	Allows the user to manage booking including its configuration, quota, and capacity.	Field Service Manager Duty Role
Manage Routing	Allows the user to manage Field Service scheduling and optimization engine.	Field Service Manager Duty Role
Manage Oracle Fusion Field Service Mobile App Dashboards	Allows the user to manage dashboards and reports in Field Service mobile app.	Field Service Manager Duty Role
Access Oracle Fusion Field Service Forecasting	Allows the user to access forecasting data in Field Service.	Field Service Manager Duty Role
Configure Oracle Fusion Field Service Mobile App	Allows the user to configure Field Service mobile app.	Field Service Application Administrator Duty Role
Run Scheduler Jobs for Oracle Fusion Field Service	Allows the user to manage scheduler jobs for Field Service.	Field Service Application Administrator Duty Role
Manage Scheduled Processes	Allows management of Scheduled Processes.	Field Service Application Administrator Duty Role

Run Resource Type Preparation Process for Field Service

The **Resource Type Preparation Process for Field Service** process updates the resource types used to configure field resources in Oracle Fusion Field Service. To keep information up-to-date, it's best practice to schedule this process to run every six hours. If this process isn't run regularly, you might see outdated information when setting up Resource Types or User Types.

Note: Navigator > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To schedule the Resource Type Preparation Process:

1. Click **Run Resource Type Preparation Process for Field Service**.
2. Click **Advanced** and go to the **Schedule** tab.
3. Set **Run** to Using a schedule.
4. Set the **Frequency** to Hourly/Minute and **Time Between Runs** to 6 hours.
5. Enter the desired start and end dates and times.
6. Select **Notify me when this process ends** to receive a notification when the process completes.
7. Click **Submit**.
8. Click **OK** on the confirmation message and return to the **Functional Areas** task list.

Manage Person Types

Managing person types is optional while setting up Oracle Fusion Field Service. However, selecting a person type is required whenever you create a new user. A person type groups individuals within your organization for reporting and access purposes. For example, it distinguishes employees from contractors.

Default Person Types

Oracle Fusion Field Service supports three System Person Types by default:

- **Employee:** Covers various employee types or statuses.
- **Not Managed by HR:** For individuals not managed in HCM, for example, non-workers participating in company activities, such as badging or application integration purposes.
- **Contingent Worker:** For contractual or temporary workers. If your organization uses both employees and contingent workers in HCM, ensure that you create the resource in Field Service as a regular worker and select the correct HCM person type.

System person types can't be changed. However, you can create more **Assignment Person Types** in each system person type for further distinction. For instance, you could create Assignment Person Types such as Associate, Consultant, or Seasonal to better describe your workforce.

Note: Navigator > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To add a person type:

1. If you don't see this task, click **All Tasks**.
2. Click **Manage Person Types**.

   In this example, we'll add an Assignment Person Type called Associate in the Employee system person type.
3. On the **Person Type** page, select Employee from the **System Person Type** list.
4. Click **Add**.
5. Enter the Assignment Person Type name and click the check mark icon in the **Action** column.
6. Click **Submit**.

   You're returned to the **Functional Areas** task list. The new Assignment Person Type name is available as an option when creating new users.

   For more information about how person types are used, see the Person Types section in the *Implementing Global Human Resources* guide.

Manage Job

The concept and usage of jobs in Fusion Applications is a Human Resources responsibility - or at least a consideration, and how they're used with positions is decided in the HR part of an implementation. As such, this task is neither required nor particularly relevant to getting Oracle Fusion Field Service set up.

To learn more about how to set up and manage jobs, see the Jobs and Positions section in the *Using Global Human Resources* guide.

Manage Resource Roles

Resource roles in Fusion Applications decide how different resource types are managed in Oracle Fusion Field Service. They're distinct from job roles, which control access. Once set up, resource roles can be associated with various field resource types to further define responsibilities, such as Field Service Mobile Worker, Field Service Contractor, or Field Service Manager.

Managing resource roles is a required task. You must assign each field resource to a resource role before you can assign them to an organization or assign work. Also, any new users you create will need to be assigned an appropriate resource role. Make sure to create and associate all necessary resource roles and resource types before adding users.

> **Note:** **Navigator** > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To create a resource role:

1. Click **Manage Resource Roles**.
2. Click **Create**.
3. Enter a name for the role in the **Role Name** field (for example, Field Service Mobile Worker, Field Service Contractor, or Field Service Manager).
4. Enter the role code used in your organization in **Role Code** field (for example FFS_MOBILE_WORKER, FFS_MANAGER.).
5. Select Service in the **Role Type** field.
6. Specify the role's orientation:
    - For individual resources, select Member.
    - For managerial resources, select Manager.
    - For an administrative resource, select Administrator.
7. If your organization uses jobs, when creating a user, you can select a job that triggers automatic resource role assignment (available in the **Manage Users** task).

8. Click **Save and Close** to return to the **Functional Areas** task list.

   The resource roles created here appear as options within the **Associated Resource Role** field on the **Add or Edit Resource Type** pages in Oracle Fusion Field Service.

   For more information about managing resource types, see the Resource Types topic in the *Administering Oracle Field Service* guide.

Manage HCM Role Provisioning Rules

Role provisioning rules ensure that users automatically receive the correct job roles when they're created. Without these rules, new users will not have access to data or functions and can't perform tasks in the application. By setting up rules, you can map resource roles (such as Field Service Mobile Worker) to the corresponding job roles (such as Field Service Mobile Worker job role). This way, when you add a new user and assign them a resource role, the application automatically grants the matching job role and permissions. Automatic provisioning makes the process more efficient and consistent.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To add a role provisioning rule:

1. Click **Manage HCM Role Provisioning Rules**.
2. On the **Manage Role Mappings** page, click **Create** to create a provisioning rule.

   The **Create Role Mapping** page appears.
3. In the **Mapping Name** field, enter a descriptive name that identifies the mapping (for example, Field Service Mobile Worker).
4. In the **Conditions** section, enter these conditions:
   a. **Resource Role:** Select the relevant resource role (for example, Field Service Mobile Worker).
   b. **HR Assignment Status:** Select **Active**. This ensures that the roles are removed automatically if the user is terminated in Global Human Resources.
5. In the **Associated Roles** section, click **Add** to specify the job roles to provision. (For example, the Field Service Mobile Worker job role.)
6. For each job added, select the appropriate role-provisioning options:
   a. **Requestable:** Qualifying users can provision the role to other users. A 'qualifying user' is one that satisfies the rule conditions.
   b. **Self-Requestable:** Qualifying users can request the role for themselves.
   c. **Autoprovision:** Qualifying users can receive the role automatically (default).
7. Click **Save and Close** and then **Done** to return to the **Functional Areas** task list. Repeat the process for each resource role you want to assign.

   After creating or editing role mappings, run the **Autoprovision Roles for All Users** process.

8. To do this, go to **Navigator** > **Tools** > **Scheduled Processes**. Search for and run the **Autoprovision Roles for All Users** process. This evaluates all users and updates their role memberships per the latest rules.

   For more information about role provisioning, see the Role Management topic of the *Using Global Human Resources* guide.

   For more information about the processes including the Autoprovision Roles for All Users process and the Send Pending LDAP Requests process and how they impact one another, see the *Best Practices for Scheduled Processes* guide.

Manage HCM Atom Feeds

Atom Feeds are processes that detect changes to HCM Cloud resources and update downstream applications that can read these feeds. For Oracle Fusion Field Service, only the User Requests Atom Feed is required (and is enabled by default). This feed enables you to view new user records and any changes to them in Oracle Fusion Field Service in near real-time. This task is optional.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To verify that the User Requests HCM Atom Feed is enabled:

1. If you don't see this task, click **All Tasks**.
2. Click **Manage HCM Atom Feeds**.
3. In the search field, type 'user requests'.

   The User Requests atom feed appears in the list.
4. Click the User Requests atom feed.
5. Verify that Enabled is selected. If it's not, then select it.
6. If you've made changes, click **Save and Close** and **Done**. If not, then click **Cancel** and **Done** to return to the **Functional Areas** task list.

   For more information on HCM Atom Feeds, see the Atom Feeds topic in the *REST API for Oracle Fusion Cloud HCM* guide.

Manage Internal Resource Organizations

Internal resource organizations represent your enterprise's hierarchy and appear as “Organization Units” in the Resource Tree in Oracle Fusion Field Service. You can initially assign users to these organizations.

> **Note:** For routing and booking, manage Field Service buckets directly in the Oracle Fusion Field Service user interface. You can easily move users or resources between organization units and buckets from within Oracle Fusion Field Service.

Note: Navigator > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To create an internal resource organization:

1. Click **Manage Internal Resource Organizations** to view or search for existing resource organizations.
2. To create an organization, click **Create** on the **Manage Internal Resource Organizations** page.
3. On the **Create Organization: Select Creation Method** choose Option 2: **Create New Organization** and click **Next**.
4. Enter the name of the resource organization in the Name field (for example, 'Supremo Fitness - FL'). Keep these points in mind when naming resource organizations:
    - This is the name that appears within the resource tree in Oracle Fusion Field Service, after a user is created and assigned to the organization.
    - Resource organization names must be unique.
    - The names don't have to correspond to any actual company units. The names are there solely to create a resource tree.
    - Avoid using a manager name, as this might change in the future.
5. In the **Organization Usages** section, click **Add** and then select **Service Organization**.
6. Click **Finish** and then use the Back arrow to return to the **Functional Areas** task list.

    If you need to rename a resource organization later, use the **Manage Internal Resource Organizations** task.

Manage Users

With job roles in place that define what areas of Oracle Fusion Field Service users will have access to, resource roles that define any potential resource type differences and provisioning rules for them, and organizations for your Oracle Fusion Field Service resource tree hierarchy in place, now it's time to start creating users.

Before creating a user, make sure you've:

- Defined job roles (to decide users' access in Oracle Fusion Field Service)
- Set up provisioning rules and resource roles
- Established the organization hierarchy for your resources

To create user accounts for your employees:

- If you're using Oracle HCM, always use the **Hire an Employee** task to create user accounts (see the Introduction chapter for details).
- If Oracle Fusion Field Service is your first Oracle Fusion application, use the **Manage Users** task.

Note: The best practice is to create one user (or a minimum number of select users) initially while configuring the various Oracle Fusion Field Service pages and metadata. This provides views into those configurations from both a resource's perspective and from an administrator's. After the application is fully configured to your requirements, then proceed with adding the rest of your users. This ensures that your field users have a positive and intuitive first impression of the application that they will be working in.

Create a User

Before you start creating users, make sure you complete the prerequisites mentioned in the Manage Users topic.

> **Note:** The best practice is to create one user (or a minimum number of select users) initially while configuring the various Oracle Fusion Field Service pages and metadata. This provides views into those configurations from both a resource's perspective and from an administrator's. After the application is fully configured to your requirements, then proceed with adding the rest of your users. This ensures that your field users have a positive and intuitive first impression of the application that they will be working in.

> **Note: Navigator** > **My Enterprise** > **Setup and Maintenance** > **Users and Security**

To create a user:

1. Sign in to your Oracle Applications Cloud environment as an implementation user. Use the Navigation given earlier and navigate to the **Users and Security** Functional Area.
2. Click the **Manage Users** task. Or, go to **Navigator** > **My Team** > **Users and Roles**.
3. In the **Search Results** section, click the Create icon to open the **Create User** page.
4. In the **Personal Details** section, enter the user's name and a unique email address.

   The application uses this email for notifications. The **Hire Date** defaults to today's date. To update the email address later, use the **Users** tab in the Security Console or file import. You can't change it on the **Edit User** page in **Manage Users**.
5. In **User Details**, choose whether to create a new account or link an existing account.

   For Oracle Fusion Field Service users, select **Enter user name** and specify a user name. If you leave this blank, the email address is used as the default user name.
6. In the **User Notification Preferences** section, choose **Send user name and password** to send the user a notification with account info.
   - This is available only if notifications are enabled and the appropriate notification template (such as **New Account Template**) is active.
   - If you don't want to notify users immediately, deselect this option. To send notifications later, run the **Send User Name and Password E-Mail Notifications** process.
   - There can be a 30–40 minute delay during account creation; sending the notification later can prevent unsuccessful sign-in tries.
7. In the **Employment Information** section, complete the relevant fields:
   - **Person Type** (for example, Employee)
   - **Legal Employer** (created using **Manage Legal Entity**)
   - **Business Unit** (set up using **Manage Business Unit**)
8. In the **Resource Information** section:
   - **Resource Role:** Select the resource role created using **Manage Resource Roles**.
   - **Reporting Manager:** Choose the manager, if needed (can be left blank for the top-level user).
   - **Organization:** Select an organization using **Manage Internal Resource Organizations**. If the organization doesn't exist yet, use the **Create** link to add it.

9. In the Roles section, assign job roles to the user, either automatically or manually:
    - **Autoprovisioning:** Click **Autoprovision Roles** if rules are in place. Qualifying roles appear in the Role Requests table.
    - **Manual provisioning:** Click **Add Role**, find and select the role, and it will appear in the Role Requests table.
10. Click **Save and Close** and then **Done** to return to the **Functional Areas** task list.

> **Note:** At this point, you've completed all tasks in the **Users and Security** area. To complete the remaining user interface setup for Oracle Fusion Field Service, go to **Navigator** > **Field Service** > **Field Service** > **Configuration**. For more details, see the *Administering Oracle Fusion Field Service* guide.

- For more information on managing users using API, see the *REST API for Oracle Fusion Cloud HCM* guide.
- For more information on managing users with spreadsheets, see the Users topic in the *Securing Applications* guide.
- For more information on setting default values for regional preferences (such as date, time, number, currency, and time zone), see the Set Value Formats for Regional Preferences for All Users section in the *Using Common Features for HCM* guide.
- For more information on how to setup Sign-On in Oracle Identity Cloud (IDCS) see *Managing Access to Resources*.

What Happens After you Create a User

After you create a user using the **Manage Users** Task, the application completes setup in the background. After a few minutes, the user appears on the **Resources** page in Oracle Fusion Field Service.

Here are some more things that happen in the background:

1. **Email Notification:** If you've selected **Send user name and password** (or later run the Send User Name and Email Notifications process), the user receives an email with a password reset link. After the user resets their password, accepts the terms of use, and creates a PIN, they're redirected to Oracle Fusion Field Service.
2. **Role-Based Access:** The user's job roles define which menus and features they can access. These job roles also decide the user type and corresponding permissions in Oracle Fusion Field Service.
3. **Resource Role Assignment:** The selected resource role defines the user's resource type. If no resource role was chosen, or if the role isn't linked to a field resource type, the user defaults to Manager/Dispatcher/Admin, with visibility for the full resource tree.
4. **External ID:** For users assigned a field resource type, the application automatically generates a unique Party ID, displayed as the user's External ID.
5. **Resource Tree Placement:** A user with a field resource type is placed in the organization unit you specified during creation. If needed, you can move the user later to a more appropriate organization unit or bucket.

Next, you can complete the user interface setup for Oracle Fusion Field Service by navigating to **Navigator > Field Service > Field Service > Configuration**. For more information on this configuration, see the *Administering Oracle Fusion Field Service* guide.

5 Revision History

Revision History

Date	What's Changed	Notes
October 2025	All the topics are edited for conciseness. The Manage Users topic has been split into three topics: • Manage Users • Create a User • What Happens After you Create a User	
January 2025	Initial release	