

**Oracle Field Service Configurations for
Oracle Utilities Customer Care and Billing
Integration to Oracle Field Service**

Setup Guide

Release 24B

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Oracle Field Service Configurations for Oracle Utilities Customer Care and Billing Integration to Oracle Field Service Setup Guide

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Preface

Welcome to the Oracle Field Service Configurations for Oracle Utilities Customer Care and Billing Integration to Oracle Field Service Setup Guide for release 24A. This document covers relevant information to manage and configure Oracle Field Service as required by the integration.

Note: The screenshots and images provided in this document are sample references based on the current release of Oracle Field Service Configurations for Oracle Utilities Customer Care and Billing Integration to Oracle Field Service. They may change based on changes in future releases.

The preface includes the following:

- [Audience](#)
- [Documentation and Resources](#)
- [Updates to Documentation](#)
- [Documentation Accessibility](#)
- [Conventions](#)
- [Acronyms](#)

Audience

This document is intended for anyone implementing the integration between Oracle Utilities Customer Care and Billing and Oracle Field Service.

Documentation and Resources

For more information regarding this integration, foundation technology and the edge applications, refer to the following documents:

Product Documentation

Resource	Location
Oracle Utilities Customer Care and Billing Integration to Oracle Field Service documentation	https://docs.oracle.com/en/industries/energy-water/integrations-index.html
Oracle Utilities Customer Care and Billing documentation	https://docs.oracle.com/en/industries/energy-water/ccb/index.html
Oracle Field Service documentation	https://docs.oracle.com/en/cloud/saas/field-service/22d/index.html

Additional Documentation

Resource	Location
Oracle Integration Cloud Service documentation	Refer to the OIC documentation at: https://docs.oracle.com/en/cloud/paas/integration-cloud/index.html
Oracle Support	Visit My Oracle Support at https://support.oracle.com regularly to stay informed about updates and patches. Refer to the <i>Certification Matrix for Oracle Utilities Products (Doc ID 1454143.1)</i> on My Oracle Support to determine if support for newer versions of the listed products is included. For more information, refer to the Oracle Utilities Integrations page at http://my.oracle.com/site/tugbu/productsindustry/productinfo/utilities/integration/index.htm
Oracle University for training opportunities	http://education.oracle.com/

Updates to Documentation

The complete Oracle Field Service Configurations for Oracle Utilities Customer Care and Billing Integration to Oracle Field Service documentation set is available from Oracle Help Center at <https://docs.oracle.com/en/industries/energy-water/index.html>.

Visit [My Oracle Support](#) for additional and updated information about the product.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support for the hearing impaired. Visit: <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs>

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Acronyms

The following terms are used in this document:

Term	Expanded Form
OUCCB	Oracle Utilities Customer Care and Billing
OFS	Oracle Field Service
OIC	Oracle Integration Cloud

Chapter 1

Accelerator Overview

This chapter focuses on software requirements for Oracle Field Service and provides an overview of the configuration. It includes the following:

- [Configuration Overview](#)
- [Accelerator Project](#)
- [Accelerator Activity Types](#)

Configuration Overview

This section covers basic Oracle Field Service configurations, such as activity types, user types, properties, UI screens, validations for these UIs, plugins, and resource configurations.

Accelerator Project

The accelerator project includes various user types, properties, and plugins. This document explains the configurations for other elements, such as activity types, work zones, work skills, work conditions, and outbound channel.

The project helps customers configure and set up Oracle Field Service used in Oracle Utilities Customer Care and Billing integration to Oracle Field Service. The integration project contains only Oracle Utilities Customer Care and Billing and Oracle Integration Cloud configuration files and instructions. In addition to the integration project, this document provides a complete end-to-end setup for the integration.

The contents of the project are:

- **User Types:** Define layouts and UI screens. The new UIs for Service Point Details, New Meter Details, and Existing Meter Details UIs are linked to user types. For more details, see the [User Types](#) section.
- **Properties:** Create layouts and mapping. For more information, see the [Properties](#) section.
- **Plugins:** The Device Verification plugin is a part of the project that which takes in the badge number and returns the device details if a corresponding device exists. For more information, see the [Forms and Plugins](#) section.

Accelerator Activity Types

This accelerator is used as a starting point for customer implementation. It provides configurations for the following basic Activity Types. Customers should create UIs for additional activity types or customize the existing UIs for the supported Activity Types. Reopened activities are also supported in this integration.

- Install Meter
- Remove Meter
- Read Meter
- Replace Meter
- Install Item
- Replace Item
- Connect SP
- Disconnect SP

Chapter 2

Installing Basic Accelerator Package

This chapter focuses on importing the files that come as a part of the package and configuring them in the Oracle Field Service environment for the integration to run successfully. Make sure to follow the same sequence for successful configuration. It includes the following:

- [Activity Types](#)
- [Properties](#)
- [Forms and Plugins](#)
- [User Types](#)

Activity Types

Activity types define the categories of the activity supported by Oracle Field Service (in this case, Oracle Utilities Customer Care and Billing integration to Oracle Field Service). In the activity type, various fields (such as time slots and activity status) are denoted using colors and features that each activity type supports. They can be customized for each activity type.

To create an Activity Type Group:

1. Login to Oracle Field Service with valid credentials.
2. Click the hamburger menu icon (icon with three horizontal lines) on the upper-left corner of the **Home** page.
3. Navigate to **Configuration > Resources, Activities, Inventories > Activity Types**.
4. Select **Activity Types** and click **Add New**.
5. Enter the name and other activity type details. Click **Add**.
6. For other activity types listed (Install Meter, Disconnect SP, Meter Read, Meter Replace, Connect SP, Item Replace, Disconnect SP, and Item Install), clone and modify the name and details as required.
7. Make sure to enter the corresponding lookup values in the CCBOFSC_ActivityType lookup for all activity types in Oracle Integration Cloud.
Example: FWINSTMT (CCB Task Type) corresponding to Meter Install (OFSC Activity Type)
8. Add only those activity types that are required and specific to customers.
9. To group the activity types under specific groups, click **Add Group**.
10. Enter “CCB-OFSC” and click **Add**.

Properties

Properties are custom fields used to enable the Utility Integration specific UIs created, and to map the Oracle Field Service UIs. Each property is classified into types (such as field, integer, enumeration and string) based on the requirements. They should be addressed using this property.

For this integration, the properties to enable utility specific functionality and UIs are created in Oracle Field Service. Property includes meter read, meter, item, and other completion related details.

To import the property file that is a part of the accelerator package:

1. On the **Configuration** page, select **Resources, Activities, Inventories > Properties**.
2. Click **Import**.
3. Browse to the location of the file to be imported and click **Import**.

4. Verify the successful import of the file. The **Successfully Imported** message with number of properties imported is displayed. Make sure the **Imported with warnings** and **Not imported** count is 0.
5. Click **Close**.

Forms and Plugins

Use plugins to modify the screen and data based on their type and status of target and parent object. The section focuses on how to configure the following forms and plugins used in Oracle Field Service:

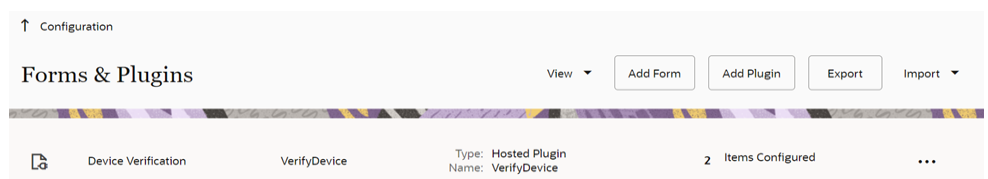
- [Device Verification Plugin](#)
- [Custom Activity Types Support](#)
- [Custom Meter ID Types Support](#)
- [Unrelated Pickup Plugin](#)

Device Verification Plugin

The Device Verification plugin accepts the badge number of the device, and in response, sends various parameters from Oracle Utilities Customer Care and Billing, such as unit of meter, read sequence, dials, and decimals after verifying the badge number in the Oracle Utilities Customer Care and Billing environment.

To configure a Device Verification plugin:

1. Navigate to **Configuration > Displays > Forms and Plugins**.
2. From the **Import** drop-down list, select **Plugins**.
3. Click **Drag and Drop** to select the **Device Verification** plugin.
4. Click **Validate**. Oracle Field Service validates the plugin and the number of valid items should be '1'.
5. Click **Import**. Make sure the values in the **Number of valid items** and **Number of not valid items** fields are '1' and '0' respectively.
6. After the plugin is imported successfully, **Oracle Field Service** displays the respective details.



7. Select the Device Verification plugin and enter the following details under the **Secure Parameters** section:
 - oic_url: https://oichost/ic/api/integration/v1/flows/rest/ OUTL-BA-OFSC_CCB_DEVICE_VERIFY /1.0/
 - oic_uname: OIC username

- oic_password: OIC password

☐ Disable button in Offline

Plugin parameters
 Duplicate names are not allowed. Overall size should not exceed 5 KB.

oic_int_url

oic_username

oic_password

Available Properties

- Make sure the **Available Properties** tab is populated with all required properties.

Available Properties

Select values

1Meter Dial [u_meter1_dial] x

Activity type [a_worktype] x

1Current Index [u_meter1_current_index] x

2Meter # [u_meter2_number] x

1Meter Model [u_meter1_model] x

Service Point ID [u_service_sp_id] x

New Item Number [u_newitem_nbr] x

1Meter Upper Limit [u_meter1_upper_limit] x

1Meter Lower Limit [u_meter1_lower_limit] x

1Meter Dial2 [u_meter1_dial2] x

1Meter Dial3 [u_meter1_dial3] x

1Meter Lower Limit 2 [u_meter1_lower_limit2] x

1Meter Lower Limit 3 [u_meter1_lower_limit3] x

1Meter Upper Limit 2 [u_meter1_upper_limit2] x

1Meter Upper Limit 3 [u_meter1_upper_limit3] x

2Current Index [u_meter1_current_index2] x

3Current Index [u_meter1_current_index3] x

1Meter Dial4 [u_meter1_dial4] x

1Meter Dial5 [u_meter1_dial5] x

1Meter Lower Limit 4 [u_meter1_lower_limit4] x

1Meter Lower Limit 5 [u_meter1_lower_limit5] x

1Meter Upper Limit 4 [u_meter1_upper_limit4] x

1Meter Upper Limit 5 [u_meter1_upper_limit5] x

4Current Index [u_meter1_current_index4] x

5Current Index [u_meter1_current_index5] x

New Meter Manufacturer [u_newmeter_manufacturer] x

New Item Manufacturer [u_newitem_manufacturer] x

New Meter Model [u_newmeter_model] x

New Item Model [u_newitem_model] x

1MeterNumberOfDecimals [u_meter1_numberofDecimals] x

1MeterNumberOfDecimals2 [u_meter1_numberofDecimals2] x

1MeterNumberOfDecimals3 [u_meter1_numberofDecimals3] x

1MeterNumberOfDecimals4 [u_meter1_numberofDecimals4] x

1MeterNumberOfDecimals5 [u_meter1_numberofDecimals5] x

Status [u_verify_status_flag] x

Unit Of Measure [u_meter1_uom3] x

Unit Of Measure [u_meter1_uom2] x

Unit Of Measure [u_meter1_uom] x

Time Of Use [u_meter1_TOU1] x

Time Of Use [u_meter1_TOU2] x

Time Of Use [u_meter1_TOU3] x

Time Of Use [u_meter1_TOU4] x

Time Of Use [u_meter1_TOU5] x

Unit Of Measure [u_meter1_uom4] x

Meter Configuration [u_new_meter_type] x

Device Verification Activity Types [u_device_verify_act_types] x

Meter ID Types [u_meter_id_types] x

New Meter Read sequence [u_meter1_read_seq] x

New Meter Read Sequence [u_meter1_read_seq3] x

New Meter Read sequence [u_meter1_read_seq2] x

New Meter Read Sequence [u_meter1_read_seq4] x

New Meter Read Sequence [u_meter1_read_seq5] x

- After the plugin is configured, navigate to the **Users, Security, Integrations > User Type** page and select it in the **Plugins** field to connect it to the specific field on the UI on the **Mobility** page.

Meter Details

VerifyDevice

Plugins

Visibility

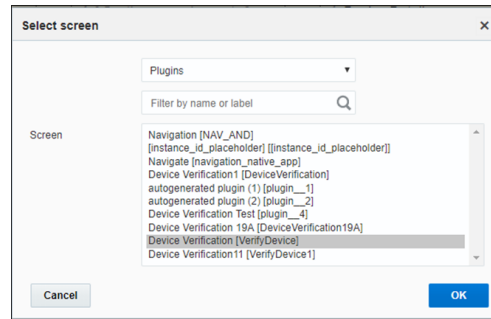
RO By default for all values

Translations

Device Details

Device Verification

Status:



10. Click **OK**.

Custom Activity Types Support

To configure custom activity types to support Device or Item Verification plugin:

1. Login to Oracle Field Service.
2. Navigate to **Configuration > Resources, Activities, Inventories > Properties**.
3. Search for the “u_device_verify_act_types” property.
4. Click the pencil icon to edit.
5. The **Values** section is a combination of **label[id]**.

In the **English** field, enter the respective label. Enter “Meter” to verify meter as part of custom activity, and the activity as part of ID.

Example: Meter[Custom_meter_activity_type]

6. Enter “Item” to verify an item as part of custom activity, and the activity as part of ID.

Example: Item[Custom_item_activity_type]

7. Click **Add** to add the values to the **Values** list.
8. Click **Update** to save the value to the property.

Custom Meter ID Types Support

The Device Verification plugin allows the crew to enter the Meter ID Type and Meter ID as part of the verification. By default, the Secondary Badge Number and Universal ID are shown as part of Meter ID Types.

To add more options to the Meter ID Type:

1. Login to Oracle Field Service.
2. Navigate to **Configuration > Resources, Activities, Inventories > Properties**.
3. Search for the “u_meter_id_types” property.
4. Click **Modify**.
5. The **Value** section is combination of **label[id]**. Enter the activity description as “Secondary BadgeNumber”. Enter the Code/CCB value in the **ID** field.

Example: Secondary BadgeNumber[2ND]

- Click **Update** to save the value to the property.

Unrelated Pickup Plugin

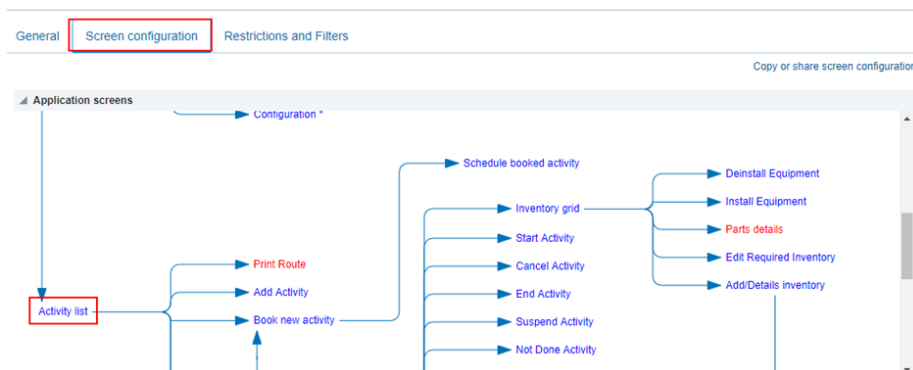
To configure an unrelated pickup activity:

- On the **Configuration** page, navigate to **Displays > Forms & Plugins**.
- Click the **Import** icon to import the Unrelated Pickup plugin provided in the package.
- Select the Unrelated Pickup plugin and enter the following details:

Parameter Name	Value	Comments
oic_int_url	https://oichost/ic/api/integration/v1/flows/rest/ OUTL-BA-OFSC_CCB_SP_QUERY/1.0/	Configure the activated service point URL
oic_username	User Name	Configure the OIC user name
oic_password	Password	Configure the OIC password
ofsc_username	OFSC user name	Configure the OFSC user name
ofsc_password	OFSC password	Configure the OFSC Password
ofsc_bucket	OFSC Bucket External ID	Configure the OFSC Bucket
ofsc_api_url	OFSC REST API URL Example: https://<site address>.<domainName>	Configure the OFSC REST API URL
latitude_format	Latitude format value Example: N2.7	Configure the format of latitude
longitude_format	Longitude format value Example: N3.7	Configure the format of longitude

Note: Username and password are the client ID and client secret retrieved from Oracle Field Service.

- Click **Configuration** and select **Users, Security, Integrations > User Types**.
- Navigate to the **Screen Configuration** tab.



- Click **Application screens** to display the structure.

7. Click **Activity list**.
8. On the left pane, click **Click to add** and select the Unrelated plugin.

Add button

Standard action screen
☐ Standard action screen
☒ *** Screen type** Plugins
☐ Custom forms

unre

Available:

☐ OMA Unrelated Work
OMA Unrelated Work

Selected:

☒ Unrelated Pickup
CCBUnrelatedPickup

Add before selected ☐

Dismiss OK

9. On the right pane, add new visibility.

Name English Original name Unrelated Pickup Plugin label: CCBUnrelatedPickup

French (European)

Save name Use original name

[Add new visibility](#) **[Unrelated Pickup] visibility**

Access Mode	Conditions	Action
☐ Read-only	*	Modify

10. Make sure the **Available Properties** tab displays all the properties as shown in the figure below.

Available Properties

Select values

Activity Notes [ACTIVITY_NOTES] x

Address [caddress] x City [ccity] x

ZIP/Postal Code [czip] x State [cstate] x

Activity Type [aworktype] x

u_unrelated_act_types [u_unrelated_act_types] x

Service Point Type [u_sp_type_desc] x

Service Point Source Status Description [u_sp_src_status_desc] x

Service Point Source Status Code [u_sp_src_status_code] x

Service Point Status [u_sp_status_desc] x

Service Point Status Code [u_sp_status_code] x

Service Point Type [u_service_pt_type] x

Service Point ID [u_service_pt_id] x

11. After the plugin is configured, select the XML file in the **User Type Screen Configurations** field to connect it to the specific field on the UI in the **Mobility** page.

CORS Setup

As part of the unrelated pickup functionality, from the plugin, there is an invocation call to OFSC REST API which needs CORS setup.

To call OFSC REST API from the plugin, set up cross-origin resource sharing (CORS) in Oracle Field Service as follows:

1. Navigate to **Configuration > Applications > Additional restrictions**.
2. Select **Allow Cross-origin resource sharing (CORS)** from the following web domains and provide the Oracle Field Service domain.
3. If the domain details are unknown, enter an asterisk (*). For the actual Oracle Field Service domain contact the Oracle Field Service support team.

Additional restrictions

☐ Allow access only to certain resources

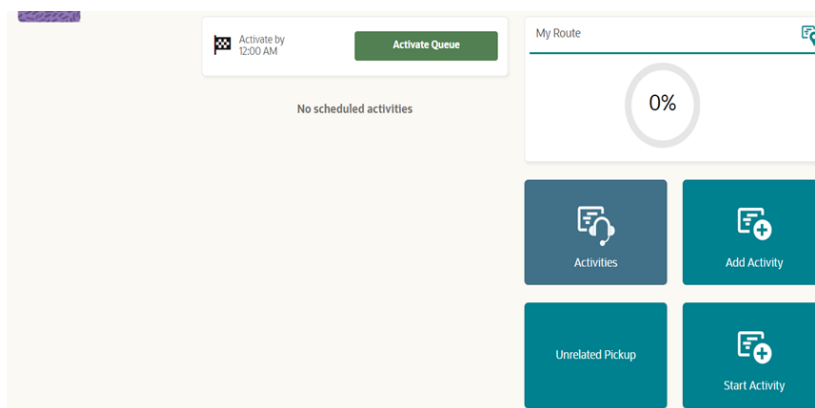
☐ Allow access only for certain IP-addresses

☒ Allow Cross-origin resource sharing (CORS) from the following web domains

Each line should contain one domain name.
Example:
https://www.example.com
https://best.customer.com
https://bestcust.com

Crew can specify search criteria and send request to Oracle Utilities Customer Care and Billing for service points. From the retrieved service points, crew can select a service point and raise a service investigation activity. The search criteria includes address, city, postal code, latitude, and longitude.

1. On the **Mobility** page, select **Unrelated Pickup** to use this feature.



2. On the **Unrelated Pickup** page search for service points.

Search for Service Point

Street Address :

Enter Address

City :

Enter City

Postal Code :

Enter Postal Code

Latitude :

Provide Latitude. Range N2.7

Longitude :

Provide Longitude. Range N3.7

Search

Dismiss

List of Service Points

Search Results

Select	Address	Service Point Type	Status
☐	696 E ALTAMONTE DR_test_Appt. 696 E ALTAMONTE DR_test_Appt2. 696 E ALTAMONTE DR_test_Appt3	This is for SOM-OFSC Integration	Connected
☐	696 E ALTAMONTE DR_test_Appt. 696 E ALTAMONTE DR_test_Appt. 696 E ALTAMONTE DR_test_Appt	This is for SOM-OFSC Integration	Connected

3. Select the desired service point from the list and click **Select**.
4. Click **Add Activity** to create the activity.

After successful creation of the activity in Oracle Field Service, the corresponding activity is created in Oracle Utilities Customer Care and Billing.

Add Activity

Activity Type :

Address :

696 E ALTAMONTE DR_test_Appt. 696 E ALTAMONTE D...

City :

ALTAMONTE SPRINGS

State :

OH

Country :

US

Postal Code :

32701

Service Point Type :

This is for SOM-OFSC Integration

Service Point ID :

732467427020

Activity Notes :

Add Activity

Dismiss

User Types

User types manage all user permissions. Each user type has a profile that defines security and display permissions, such as the user's login method, the ability to use certain functions, and access to menu items and properties. Screen-configuration settings define the screens, windows, pop-up windows and other elements visible to a certain user type. They also support the context layout editor, in which the content, arrangement, and visibilities of each context are set.

Use the **Screen Configuration** settings in specific user types to create custom screen context layouts for the integration.

Prerequisite! Make sure the Properties, Activity Types, and Plugins are loaded before proceeding.

To configure the user types:

1. Navigate to **Configuration > Users, Security, Integrations**.
2. Click the **User Types** section.
3. Click **Import** to import the user types.
4. On the **Choose file** field, click **Browse** to select the user type. Click **Validate**.
5. After successful validation, click **Import** to import the file.
6. Verify the successful import and click **Close**.



The screenshot shows a dialog box titled "User Types import. File: 10_10_18_02_39_PM_sunrise_User_Types.xml". It contains a table with the following data:

Results	Validation	Import
Successfully imported	1	1 ✓
Imported with warnings		
Not imported		

Below the table is a link labeled "> Validation Details" and a "Close" button at the bottom.

Assign a user to the user type imported and access the **Mobility** screen through the user to view the user type configurations.

Chapter 3

Additional OFS Configurations

This chapter elaborates on the additional configuration of organization, work zones, outbound channels, and UI validations in user types. It includes the following:

- [Checklist](#)
- [Organization](#)
- [Work Zones](#)
- [Work Skills](#)
- [Resource and Bucket Info](#)
- [Outbound Channel](#)
- [UI Validation Rules](#)

Checklist

Before configuring Oracle Field Service configuration, verify that the following are complete:

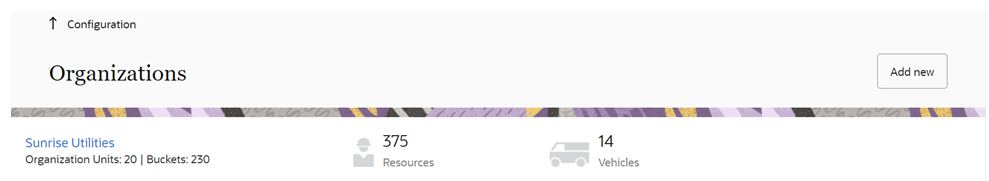
- All the activity types specific to customer are created.
- Properties are imported.
- Users and resources are configured.
- User types are imported.
- Make sure the quota has been allocated and does not need to be configured.
- Plugin has been imported.
- Name of the organization.
- Work skills are created.
- Name of the resources and work zones.
- Details of Oracle Integration Cloud to create the outbound channel.

Organization

An Organization can have buckets, organization units (Org Units), field resources, tools or vehicle associations. Make sure to create an organization before adding the types of resources.

To create an organization:

1. Navigate to **Configuration > Users, Security, Integrations > Organizations**.
2. Click **Add New** to add a new organization.



3. Enter the name of the organization and click **Submit**.

Work Zones

Work zones are used to divide area in different zones for better scheduling of crews. Use the work zone keys to provide the ZIP/postal code to facilitate the division through the Service Point information that comes from Oracle Utilities Customer Care and Billing.

To configure a work zone:

1. Navigate to **Configuration > General > Work Zones**.
2. Make sure the **Work Zone Key** (top-left corner) is ZIP/Postal Code.

ID	Work Zone Name	Work Zone Keys	Status	Shapes	Actions
18	Alliance	1000095	Active		
1	ALTAMONTE SPRINGS	32700, 32701, 32714, 44072, 82701	Active	Shape	

3. On the **Work Zones** page, click **Add new** to add the required postal codes in the **Work Zone Keys** field.

Work Zone Name
Stark

Work Zone Label
Stark

☒ Active

Delimiter
New line

Travel Area
Sunrise Enterprise

Work Zone Keys
50072

Work Zone Shapes
50072

4. Click **Add** to save the new work zone.

Work Skills

Use the work skills to assign activities to workers. Incoming activities are also assigned work skills based on certain conditions being met, and are attached to resources with corresponding skills during routing.

The integration supports only two work skills at this time of release: Meter Services, Ops and Maintenance

To create work skills:

1. Navigate to **Configuration > General > Work Skills**.
2. Click **Add New**.

- 3. Enter the details of the work skill. Add two work skills: Meter Services and Ops and Maintenance. Click **Save**.

Add Work Skill

Label

Electric

☒ Active

Name: English

Electric

Required

Name: French (European)

Sharing of the skill in teamwork

Maximal

Cancel

Add

- 4. Click **Work Skill Condition**. Make sure “Meter Services” is listed and configured with respective details. The figure below shows the necessary values.

Edit Work Skill Condition: "Meter Services(1/1)"

Work Skill

Meter Services

Required level

1

Preferable level

1

Conditions

Add new condition

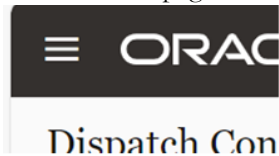
Property	Condition	Value	Actions
Activity type	In	Meter Read, Meter Install, Reconnect, High Bill Investigate, Meter Remove, Disconnect Warning, Stopped Meter Gas, Field Assessment, Emergency, Meter Exchange, Disconnect SP, Disconnect SP at Device and Remove Device (Rem), Disconnect SP at Meter and Remove Meter,	

Resource and Bucket Info

Oracle Field Service uses bucket and resources to categorize the resources. In this integration, use the bucket as a resource type to route the entire meter service tasks to workers. In the bucket, create two resources (field workers) who are assigned field activities coming from Oracle Utilities Customer Care and Billing.

To configure resource and bucket information:

- 1. On the Oracle Field Service Home page, click the three lines on the top-left corner.



2. Click **Resources** and search for respective bucket.
3. Click **Add Child Resource**.
4. Select **Bucket** to add a new bucket in the **Resource type**.
5. Enter the required details and click **OK**.
6. Click **Add child resource** and select **Technician** from the **Resource type** drop-down list. Click **OK**.

Add Resource

Resource Type: Manager/Dispatcher/Admin

Name: Required

Status: Active

Org Unit/Bucket: Sunshine Utilities

Time Format: 24-hour

Date Format: mm/dd/yy

Long Date Format: weekday, month day, year

Message Language: English

Time Zone: Eastern

User Type: Required

Login: Required

☐ Force Password Change at Next Login

☐ Self Assignment

Visible Resources:

7. Select the required work skills to this Technician. Click **Save**.

Add Work Skill

Work Skills: 3: (IDC) Carpenter, (IDC) Electrician, Active Primary Craft

Ratio:

Search...

☒ All

☐ (DEH) Operator

☒ (IDC) Carpenter

☐ (IDC) Carpenter Foreman

☒ (IDC) Electrician

☐ (IDC) Lead Electrician

☐ (IDC) Operator

☐ 22372574_CraftCode

☒ Active Primary Craft

☐ Active Secondary Craft

Outbound Channel

This element creates a channel to communicate with Oracle Utilities Customer Care and Billing and Oracle Field Service. Various channel types can be considered, but since the Oracle Utilities Customer Care and Billing integration to Oracle Field Service is through Oracle Integration Cloud, it is used as the channel type.

To add a communication channel:

1. Navigate to **Configuration > Subsystems > Applications**.
2. Click **Add Application**. Select “Oracle Integration” from the **Application Type** drop-down list. Enter the required details and click **OK**.

UI Validation Rules

Use the validation rules for activity types to various UI screens to restrict visibility. These rules are imported and enabled after the accelerator is installed. Make sure to verify the validation rules exist.

As mentioned in the [User Types](#) and [Properties](#) sections, the screens are mapped and made visible to various users using their types. These validations add a new visibility clause to restrict screens to specific activity types.

This section focuses on creating/configuring validation UIs, such as the Meter Information, Existing Meter Details, New Meter Details, and Service Point.

To create/configure a validation UI:

1. Login to Oracle Field Service.
2. Navigate to **Configuration > Users, Security, Integrations > User Types**.
3. On the **Screen Configuration** tab, scroll down to the **Edit/View activity** link.
4. Click **Details**. Verify that “RW” in the **Visibility** section has activity type.
5. Click **Service Point Details** and verify the values are displayed.
6. In the *disconnect location* section verify that the RW configuration is as shown in the following figure.

The screenshot shows a configuration window titled "u_disconnect_location" with a "Remove item" link in the top right. It contains two main sections: "Data binding" and "Visibility".

Data binding section:

- Activity field:** A text input field containing "u_disconnect_location" with an edit icon to its right.
- Type:** A dropdown menu currently set to "Combobox".

Visibility section:

It features a table with two rows, each representing a visibility rule. The first row is for activity type "M" and the second for "RO". Each row has a minus icon in a circle to its right. There is an "Add new" link in the top right of this section.

Activity type	in (equal)	Disconnect SP, Meter Remove
M		
RO		Connect SP

7. In the *not done reason* section, verify that the RW configuration is as shown in the following figure.

8. In the **Meter Information** section, verify that the RW values are as shown in the figure below.

9. In the **Existing Meter Details** section, verify that the configuration matches as shown in the following figure.

10. Make sure the **Badge Number** field has configuration as shown in the following figure.

11. Make sure the **Device Details** section is configured as shown.

Section		Remove item
☒ Section	☐ Tab	
Visibility Add new		
RW	Activity type	not in (not equal) Meter Remove
Translations		

12. Make sure the **New Meter** section is configured as shown.

Section		Remove item
☒ Section	☐ Tab	
Visibility Add new		
RW	Activity type	in (equal) Meter Exchange, Meter Install
Translations		

13. Make sure the **Item Details** section is configured as shown.

Tab		Remove item
☐ Section	☒ Tab	
Visibility Add new		
RW	Activity type	in (equal) Item Exchange, Item Install
Translations		

14. In the **Service Point Details** section, the configuration for visibility should be as shown.

Section		Remove item
☒ Section	☐ Tab	
Visibility Add new		
RW	Activity type	in (equal) Item Exchange, Item Install
Translations		

15. In the **Disconnect Location** section, the configuration for visibility should be as shown.

u_disconnect_location
Remove item

Data binding

Activity field
u_disconnect_location

Type
Combobox

Visibility
Add new

RO	Activity type	in (equal)	Connect SP	⊖
M	Activity type	in (equal)	Disconnect SP	⊖

16. Make sure the **Item Information** section is configured as shown.

Section
Remove item

☒ Section ☐ Tab

Visibility
Add new

RW	Activity type	in (equal)	Item Exchange, Item Install
----	---------------	------------	-----------------------------

Translations

17. Make sure the **Exchange Item Details** section is configured as shown.

Section
Remove item

☒ Section ☐ Tab

Visibility
Add new

RW	Activity type	in (equal)	Item Exchange
----	---------------	------------	---------------

Translations

18. For **Device Details**, there is no special configuration needed. It should be set to default.

Section
Remove item

☒ Section ☐ Tab

Visibility
Add new

RW	By default for all values		
----	---------------------------	--	--

Translations

19. Make sure the **New Item Details** configuration is as shown below.

Section		Remove item
☒ Section	☐ Tab	
Visibility Add new		
RW	Activity type	in (equal) Item Exchange, Item Install
Translations		

20. Make sure the **Registers Information** section includes the following configuration:

Section		Remove item
☒ Section	☐ Tab	
Visibility Add new		
RW	Activity type	in (equal) Meter Exchange, Meter Read, Meter Remove
Translations		

21. Make sure the **Reading Details** section includes the following configuration:

Text		Remove item
Visibility Add new		
RO	Activity type	in (equal) Meter Read
Translations		

22. Configure the **Existing Meter Reading Details** section as shown in the figure below.

Text		Remove item
Visibility Add new		
RO	Activity type	in (equal) Disconnect SP, Meter Exchange
Translations		

23. Configure the **Registers Information** section as shown below.

Section		Remove item
☒ Section	☐ Tab	
Visibility Add new		
RW	verifyStatusFlag:contains	Verification Successful
Translations		

24. Configure each register with a title in the **New Meter Reading Details** as shown.

Section
Remove item

☒ Section
☐ Tab

Visibility
Add new

RW
Unit Of Measure
is not empty

Translations

25. Configure the *Reading* section as shown below.

u_meter1_current_index
Remove item

Data binding

Activity field
u_meter1_current_index

Visibility
Add new

M
By default for all values

26. Navigate to the **Override Reading** field and verify that the default value and visibility is set as follows.

u_meter1_override_reading
Remove item

Data binding

Activity field
u_meter1_override_reading

Type
Radiogroup

Visibility
Add new

RO
By default for all values

Value visibility (0 items)

Default value and validation

Default value
2

27. Navigate to the **Screen Configuration** tab of the respective user type. Scroll down to **Book Activity**.

28. Verify if the layout structure is as shown below.

[Add marker Group](#)

Service Point ID

Name

Address

City

State

ZIP/Postal Code

Country

Duration

Existing Meter Details ☐

Badge Number

Configuration Type

Meter Location

Manufacturer

Model

Status Found

Status Left

Existing Meter Reading Registers

Reading details ☐

Read Sequence

Unit Of Measure

Reading

Override

Upper Limit

Lower Limit

Reading Details ☐

Read Sequence

Unit Of Measure

Time of Usage

Dials

Decimals

Reading

Override

Upper Limit

Lower Limit

Existing Item Details ☐

Badge Number

Configuration Type

Manufacturer

Model

Click to add

29. Click **Activity Type** in the layout and verify that all activity types are listed in the **Value Visibilities** section.

[Activity Type] value visibilities			
Add new value visibility			
☐	Value	Conditions	Action
☐	Meter Read	*	Modify
☐	Meter Install	*	Modify
☐	Meter Exchange	*	Modify
☐	Meter Remove	*	Modify
☐	Disconnect SP	*	Modify
☐	Connect SP	*	Modify
☐	Item Install	*	Modify
☐	Item Exchange	*	Modify

Chapter 4

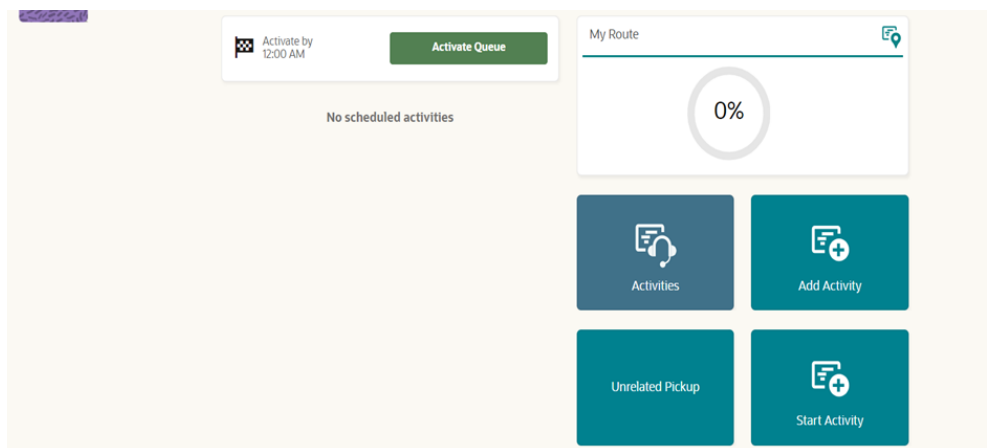
User Operations

This chapter provides step-by-step instructions for user operations.

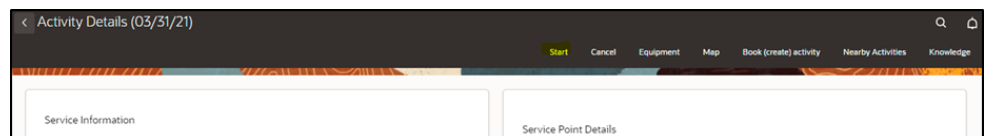
1. Login to the Oracle Field Service Mobility application.

You can access the application by adding '/m' to the Oracle Field Service URL <ofsc_link/m>.

2. Access the **Mobility** page using the worker/technician's credentials. The page shows activities in the queue of the worker.
3. Click **Start Activity** to start the activity in the worker's queue.



4. Click “>” against the activity. The options **Start**, **Cancel**, **Suspend**, **Map** and **Book Activity** are displayed.



5. Click **Start** to start the activity in the worker's queue.

6. Enter the odometer details and click **Submit**.

Start Activity

Start Time: 02 : 37 AM

Work Order: 64304924690165

Odometer:

Physical Damage: ☐

7. Click **Meter Details**, then click **Verify**. After the verification is successful, the meter reading information is displayed in the **Registers Information** section.

Device Details

Device Type: Meter

Badge Number*:

Meter ID Type: Meter ID Number:

Serial Number:

Meter Information

Device Details

Status: Verification Successful

Manual Entry: ☒ No ☐ Yes

New Meter Details

Badge Number: 2580

Meter Configuration: Electric Manual Read - kWh - Scale

Meter Location:

Manufacturer: Accumeter

Model: HD300

Status Left:

Read Information

Read Date Time: 2021-07-26 06:19:27

Read Type: Regular

Use on SM*: Yes

Registers Information

New Meter Reading Details

Read Sequence:

Use Off Hours:

Time of Usage:

SQ:

Meter Data:

Decimals: 2

Reading*:

Override Reading: ☐ No ☐ Yes

Lower Limit: 80000000

Upper Limit: 96000000

8. Enter the respective details in the **Meter Information** and **Registers Information** sections. Click **Submit**.

9. Click **Complete**.

Activity Details (05/26/21)

Complete Adjust Time Not Done Suspend Map Book (create) activity Nearby Activities Inventory Knowledge

Service Information

Activity Type: Meter Install

Activity Priority: Priority 60

Site Address: Sunny Lane

Work Order: 2148343254

Status: Started

Summary:

Comments:

Scheduling Information

Start - End: 06:29 - 06:48

Duration: 19 minutes

Service Point Details

Service Point ID: 2144015560

Service Point Type: Electric Service Residential

Premise Type: Residential

Life Support: None

Warnings:

Instructions:

Instruction Details:

10. On the **End Activity** page, enter the required details. Click **Submit**.

< End Activity

Completion Time: 06 : 17

Activity Notes:

Customer Contact Type:

Customer Contact Comments:

Remark Type:

Dismiss Submit