



Oracle Energy and Water  
Customer Edge  
Conference

# Field Service Recent Releases and Roadmap

Oracle Field Service

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**Faiza Tajammul**

**John Ranalli**

March, 2023



# Safe harbor statement

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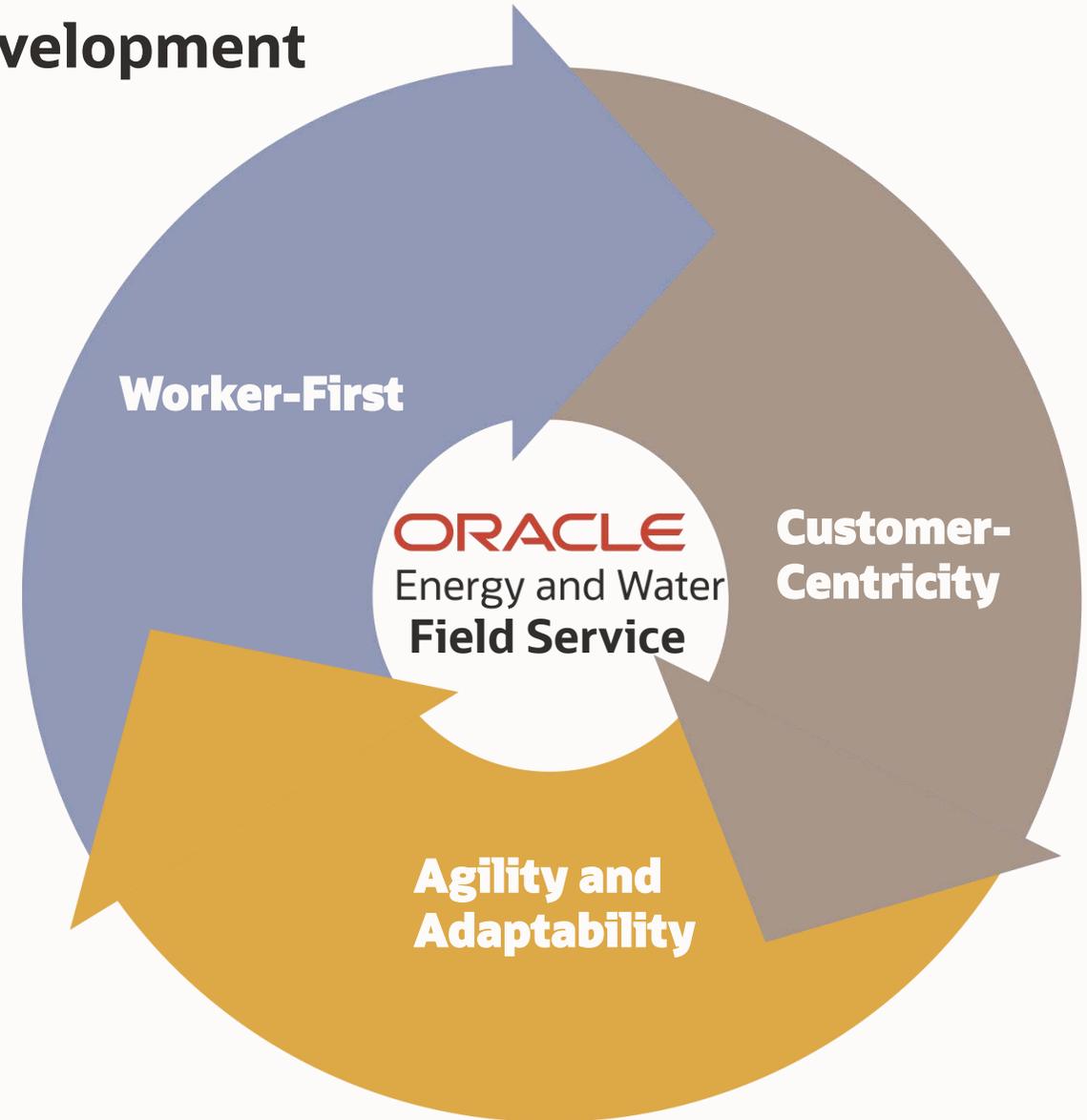
The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.



# Oracle Field Service: Vision and Development

## A New Era of Field Service

Our vision is to design a platform to meet the needs of the evolving service landscape, by focusing on three distinct tenants.



# Oracle Field Service Recent Releases

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Releases 22B-23A

# Oracle Field Service Release Readiness Pages

Cloud Readiness / Oracle Field Service Cloud  
What's New

Expand All

UPDATE 23A  
Revision History  
23A Overview  
Feature Summary  
22D Field Service  
22C Administration  
22B Capacity  
22A Core Application  
Integration  
21D Plugin Framework  
Reporting  
Routing  
IMPORTANT Actions and Considerations

## FEATURE SUMMARY

*Column Definitions:*

**Report** = New or modified, Oracle-delivered, ready to run reports.  
**UI or Process-Based: Small Scale** = These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.  
**UI or Process-Based: Larger Scale\*** = These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.  
**Features Delivered Disabled** = Action is needed BEFORE these features can be used by END USERS. These features are delivered disabled and you choose if and when to enable them. For example, a) new or expanded BI subject areas need to first be incorporated into reports, b) Integration is required to utilize new web services, or c) features must be assigned to user roles before they can be accessed.

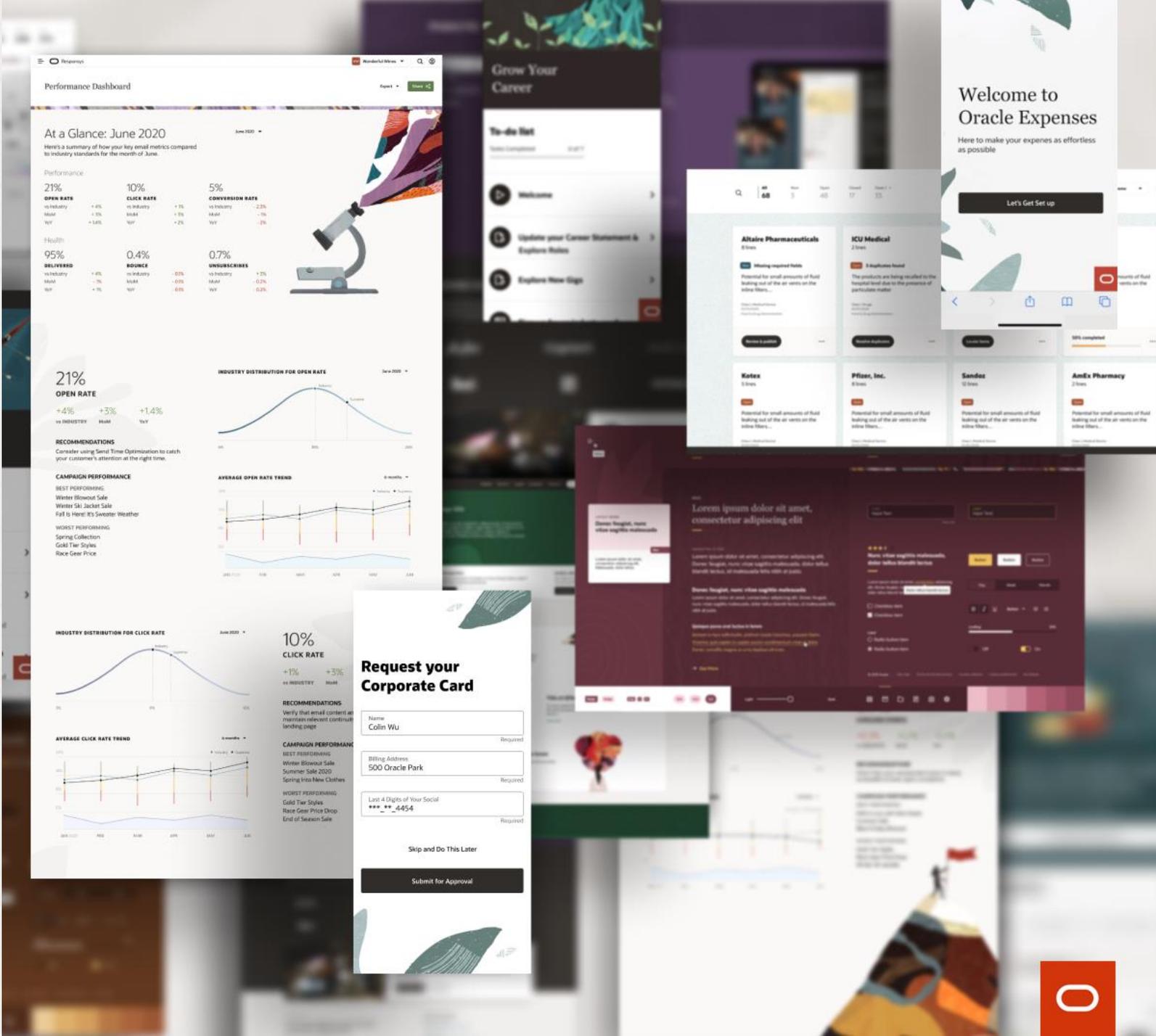
Feature	Ready for Use by End Users (Feature Delivered Enabled)			Customer Must Take Action before Use by End Users (Feature Delivered Disabled)
	Report	UI or Process-Based: Small Scale	UI or Process-Based: Larger Scale*	
<b>FIELD SERVICE</b>				
<b>Administration</b>				
Redwood Styles in Statistics Configuration		✓		
<b>Capacity</b>				
Quota Recalculation Performance Improvements		✓		
<b>Core Application</b>				
Ad hoc Filters in Dispatch Console		✓		
Finish Started Activities After Overnight End Time		✓		
Improved Nearby Activities Workflow		✓		
Redwood Style for Filters, Capacity Categories, and Link Templates Configuration Pages		✓		
Unification of Resource Location Page		✓		
<b>Integration</b>				
Book Appointment and Assign Activity Using Siebel CRM and Oracle Field Service			✓	
Resource Work Availability, Absence Management and Update Party ID Against a Resource Using OFS-HCM Recipe			✓	
Run Daily Extract from "Applications" Page		✓		
<b>Plugin Framework</b>				

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Oracle Service has a new UX

You know it as Redwood



## 22B: User Properties Available in Forms

Service Auth Request  
ARNDT, William, 03/14/22

Job name  
Maintenance

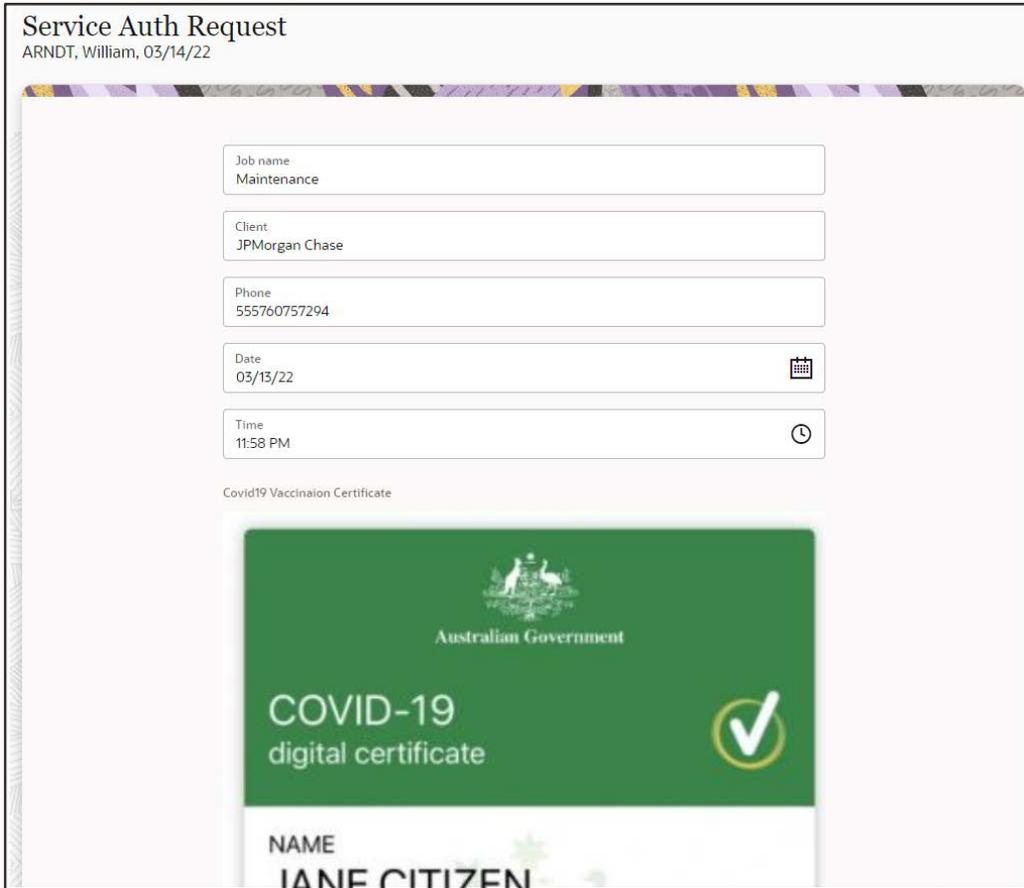
Client  
JPMorgan Chase

Phone  
555760757294

Date  
03/13/22

Time  
11:58 PM

Covid19 Vaccination Certificate



### Worker-first | Agility and Adaptability

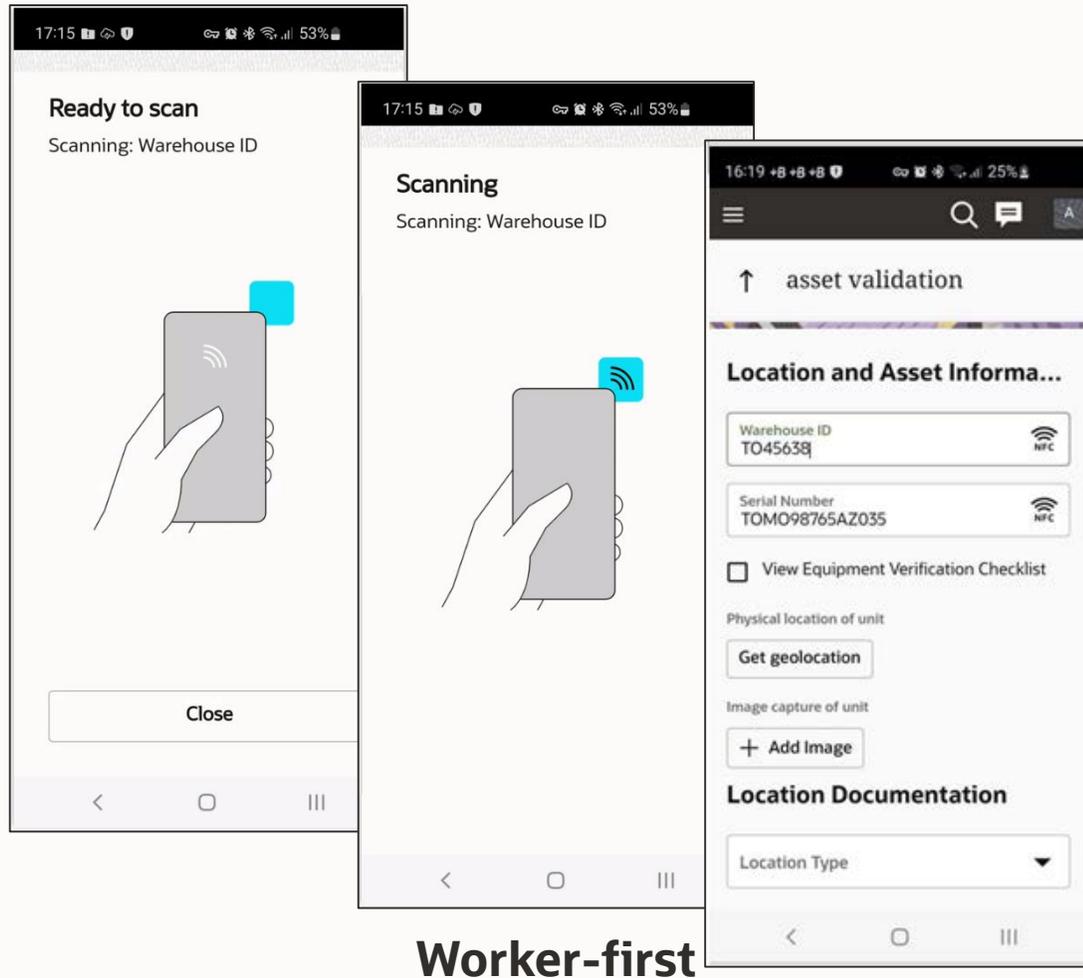
### Capability highlights

- **‘User’ entity properties** can now be used within forms configuration
- **Simplify** the collection of personal information belonging via forms
- This data can also be viewed, updated, and accessed via public APIs

### Key benefits

- Customers can now leverage data associated with individuals within critical business flows
- This allows companies to expand they service their customers in the field and reduce delays
  - Health Check (COVID temperature check)
  - Upsell (e-mail, phone number, etc.)
  - Skill Certification / Verification

# 22C: Data Entry via Near-field Communication (NFC) Tag Scanning



## Capability Highlights

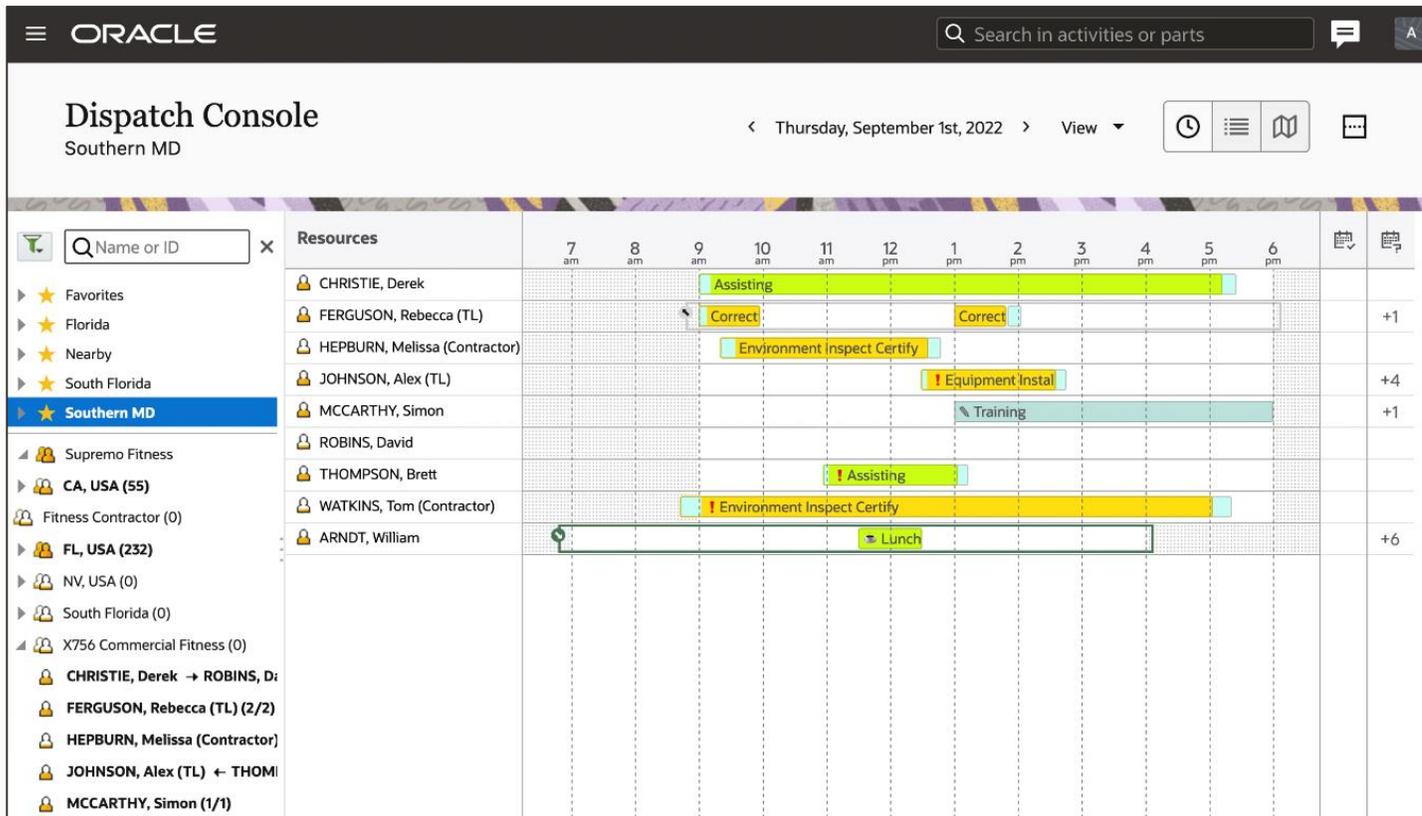
- **Simplified data entry:** scanning NFC tags via the Android and/or iOS apps

## Key Benefits

- **Accurate Data Capture:** less mistakes caused from manual input of data
- **Capture Data in one application:** no need to switch between apps
- **Incorporate into workflows:** automation of standard actions, reducing replication, improving the employee experience, and more!



# 22D: Visibility of Temporary Assigned Resources



## Capability Highlights

- **NOTE:** OFS already supports temporary reassignment via **Work Zones, Routing, and Quota**
- This feature **improves the visibility** of reassignment to the back office-users
- **Time View** shows when a mobile resource has been **temporarily re-assigned** to a different work zone
  - Understand at-a-glance the **“to”** or **“from”** work zone

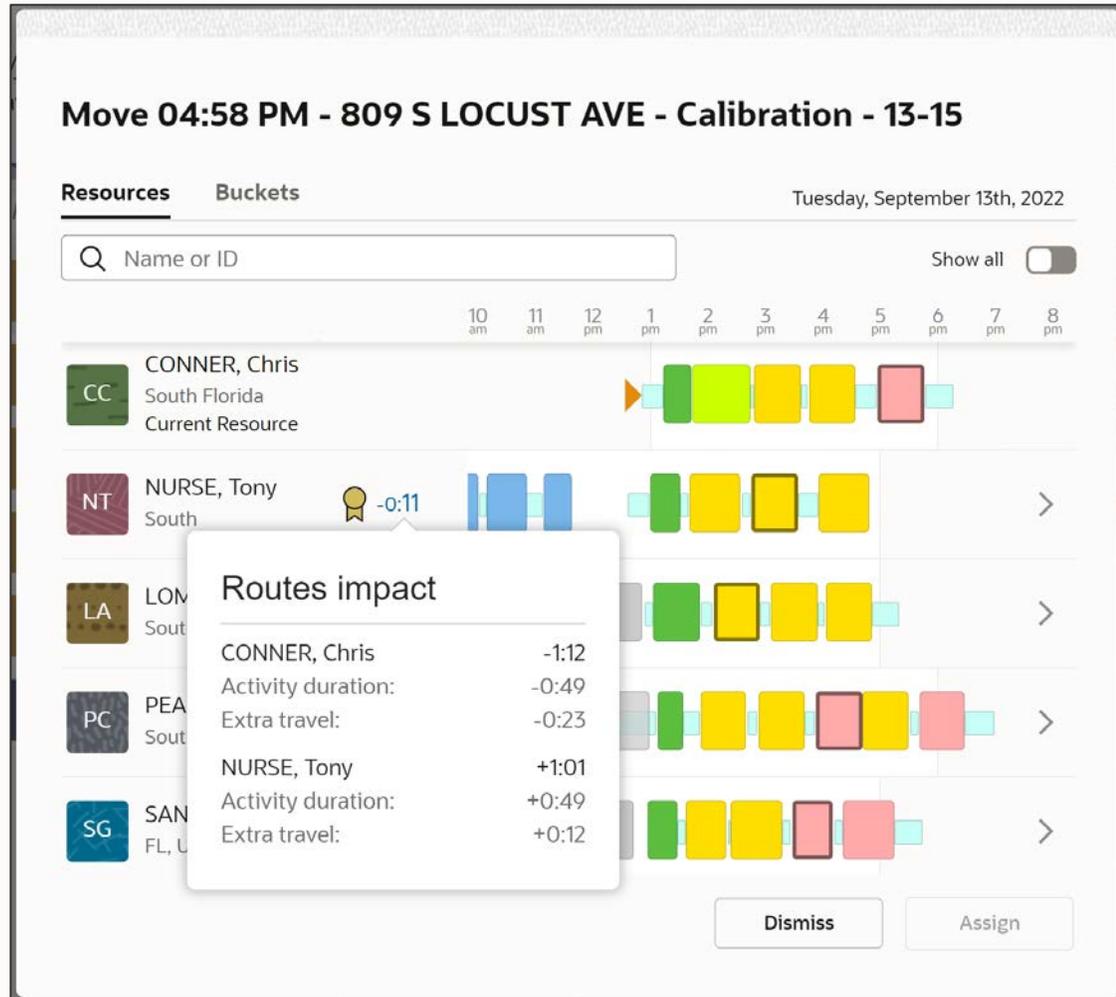
## Key Benefits

- Enhanced visibility of **temporary reassignments**
- **Improved operational efficiency** for back office users (dispatchers, supervisors, managers, etc.)

**Worker-first | Agility and Adaptability | Customer-centricity**



# 22D: Assignment Assistant: Current Resource Route Impact



## Capability Highlights

- Current resource route details is displayed at the top of Assignment Assistant
  - I.e., the resource with the activity currently assigned
- 'Routes impact' hint box shows routes will be impacted by re-assignment/move
- 'Routes impact column' summarizes the impact of resources involved in re-assignment/move

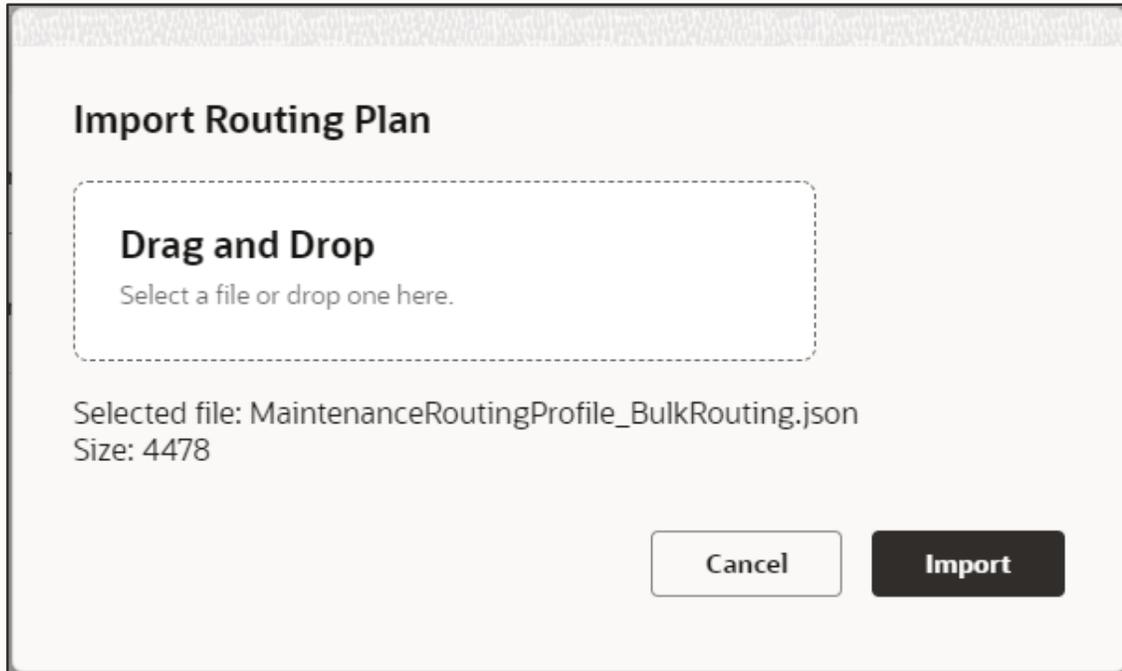
## Key Benefits

- **Visually compare** routes before and after activity move
- **Easily understand** the impact of activity reassignment based on activity alerts and 'Routes impact' data

Worker-first | Customer-centricity



## 23A: Routing Plans Export and Import



### Agility and Adaptability

#### Capability highlights

- GUI menu options now available for importing and exporting plans
- **Leverage APIs** to back-up and restore plans
- Labels have been added to help distinguish plans and profiles across instances

#### Key benefits

- Easily manage and move routing plans between instances
- **Configure, test, and improve** routing strategy on test instance and **seamlessly transfer** to production
- Allows for “**CI/CD**” approach for Routing
- **Backup and restore** routing configurations

# Cloud Customer Connect

The screenshot shows the Oracle Cloud Customer Connect website interface. At the top, there is a navigation bar with the Oracle logo and the text 'Cloud Customer Connect'. Below this is a secondary navigation bar with links for 'Categories', 'Ideas', 'Events', 'Hall of Fame', 'Training', and 'Customer Success'. The main header area features a large blue graphic with the text 'Field Service'. The main content area contains a welcome message, a search instruction, and a list of posts. On the right, there is a sidebar with a 'Post an announcement' button, a 'Search this Category' section with input fields for keywords, dates, authors, and tags, and a 'Related Links' section.

Cloud Customer Connect

Categories Ideas Events Hall of Fame Training Customer Success

## Field Service

This is a place for Oracle Field Service Cloud customers and partners to network and collaborate on real-life challenges, solutions and best practices. Please note the forum is not an official Oracle Field Service Cloud support channel, and users' comments are not vetted for accuracy.

Search for or scan threads for topics of interest, or create your own. Learn [how to ask a good question](#) that gets answered. New to Customer Connect? Visit the [Getting Started](#) page to learn how to best leverage community resources.

Status filters

-   **Upcoming Webinar: Oracle Field Service 23A Release Deep Dive (February 14th, 2023)**    
PLEASE NOTE: The details in the actual event post are currently being updated, but the webinar is in fact for the OFS 23A Release on February 14th 2023 at 9:00 PST Summa...  
**Announcement** John Ranalli-Oracle  31 views 0 comments Started by John Ranalli-Oracle  
Jan 12, 2023 11:07AM
-   **How can I search the parts catalog for a specific part with an API request?**    
A customer has successfully uploaded items to their parts catalog through the API. However, they want to look up a specific part using the API to check the complete list...  
**Received Response** Jim Altmeyer - Support-Oracle  31 views 3 comments  
Most recent by Jim Altmeyer - Support-Oracle Jan 27, 2023 8:12AM

Post an announcement

### Search this Category

Keywords

Updated From To  
   

Authors

Tags

Search

### Related Links

[Oracle Field Service Cloud Support](#)

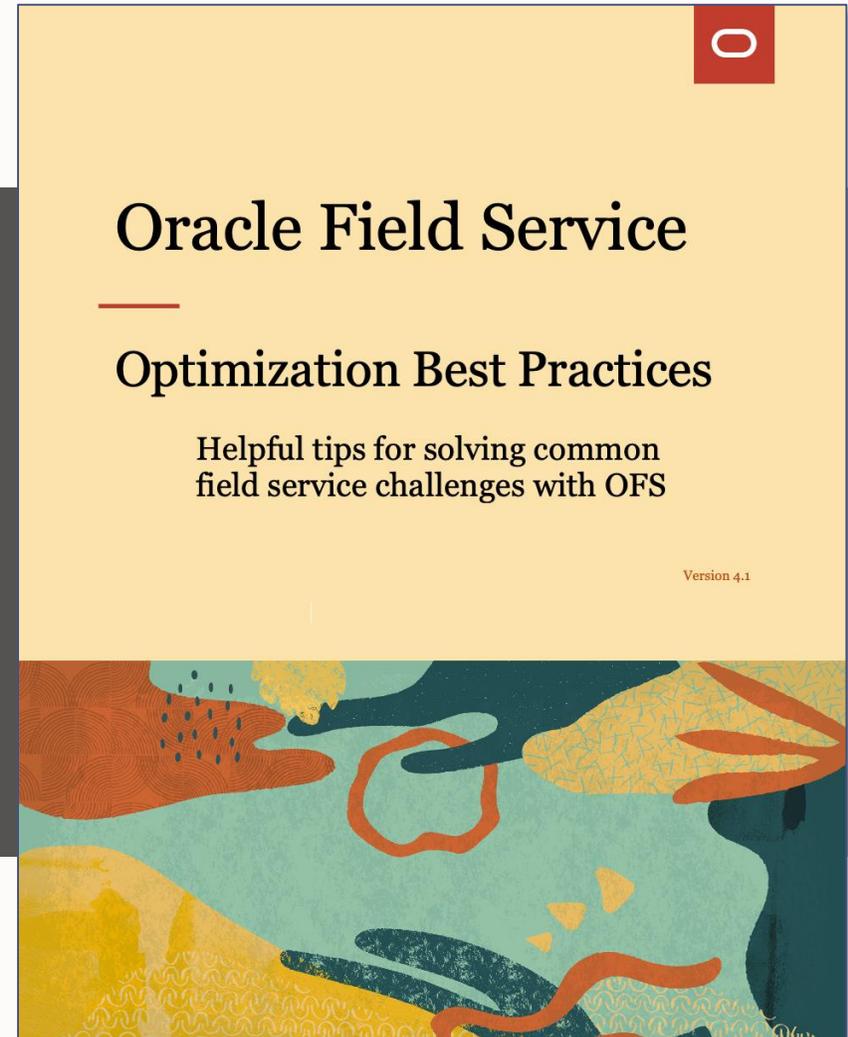


# Optimization Best Practices

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- Best practices/suggestions from Customers, Center of Excellence and Product Management
- Updated at least once per year
- Updates always accessible via same URL

[https://documentation.custhelp.com/euf/assets/docs/Field\\_Service/OracleFieldServiceCloud\\_OptimizationBestPractices.pdf](https://documentation.custhelp.com/euf/assets/docs/Field_Service/OracleFieldServiceCloud_OptimizationBestPractices.pdf)



# Oracle Field Service Roadmap

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This section will cover upcoming releases 23B+

# Oracle Fusion Cloud Applications Suite

## Roadmap: Field Service | PLACEHOLDER

### UPDATE 23A

#### CONNECTED RESOURCES

- KPI-Based Nearby Self-Assignment
- ROI-based 'What if Scenarios' workflow: import/export routing plans between environments
- Zoom Conferencing & Video Support via Collaboration
- Enhanced Nearby Activities Assignment
- Overnight Activities: enhanced usability to complete

#### CONNECTED END-CUSTOMER

- WMT ODA Skills: Spanish & Portuguese support

#### REDWOOD-BASED USER EXPERIENCE & UI

- Enhanced Filter Criteria for Dashboards
- Multiple Redwood-based enhancements in Configuration screens

#### INTEGRATIONS & EXTENSIBILITY

- OFS-Siebel OIC Accelerator
- Absence Management with HCM
- Asset-Based Service: Continued Service Logistics and Fusion Service integration enhancements via OIC
- Plugin Framework: Major Initiative
  - Faster implementation and zero maintenance with productized approach. Phase 1: Debrief Plugin
  - Use as-is. Or modify

#### ANALYTICS

- KPI-based pre-built dashboards for customers to launch and configure – SLA and Resource Utilization

### UPCOMING

#### CONNECTED RESOURCES

- Parts Return – Asset-Based Service
- Multimedia Library Initiative: Multiple Pictures and Device Storage for iOS and Android
  - Integration with Oracle Content Management to store pictures and documents
- Lock Activities for specific cases
- Time Sheet Approval Plugin Code

#### CONNECTED END-CUSTOMER

- Booking Widget Launch
- Enhanced workflow for immediate notifications to when customer provides negative/positive feedback

#### USER EXPERIENCE & UI

- Redwood based Capacity/Quota UI/UX

#### INTEGRATIONS & EXTENSIBILITY

- Energy & Water (Utilities): Integration with Network Management Solution (NMS)
- HERE Map Service support
- Asset-Based Service
  - Inventory enhancements
  - Enhanced integration OFS-Service Logistics via OIC

#### ANALYTICS

- KPI-based pre-built dashboards for customers to launch and configure – Customer Experience

### FUTURE

#### CONNECTED RESOURCES

- Gig Economy and Contractors: Self Onboarding Widget Launch
- AI: Self-Assignment based on recommendations
- Calendars: Extended breaks (non-working time)
- Crew Management enhancements
- ODA Skill: Customer and Asset Information
- Video support via MS Teams

#### CONNECTED END-CUSTOMER

- Where's My Tech post-service external links & marketing

#### USER EXPERIENCE & UI

- Continued Redwood support for new features

#### INTEGRATIONS & EXTENSIBILITY

- Fusion Service Booking enhancements
- Asset-Based Service - Continued Service Logistics and B2B integration enhancements

#### ANALYTICS

- Continued KPI-based pre-built dashboards for customers to launch and configure

1 Some features may have prerequisite requirements. See release documentation for details.

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# Release Process



Continuous Feedback
<b>Users – Features, UI/UX</b>
<ul style="list-style-type: none"><li>Idea Lab &amp; User Community</li><li>Direct Feedback: Backoffice &amp; Field Resources</li></ul>
<b>Executives – KPIs, Vision</b>
<ul style="list-style-type: none"><li>QBR &amp; Executive Review</li><li>Vision &amp; Roadmap Sessions</li></ul>



Lean & Agile Approach
<b>Releases</b>
<ul style="list-style-type: none"><li>Quarterly Releases with published timelines</li><li>Customer Portal for Self-Scheduling</li></ul>
<b>Beta &amp; Pilot Program</b>
<ul style="list-style-type: none"><li>Design Validation</li><li>Regional/Division/User-specific feature enablement</li></ul>



Additional Sources
<ul style="list-style-type: none"><li>Quarterly Release Webinars</li><li>Release Notes &amp; Notifications</li><li><b>Customer Forums</b></li><li><b>Customer Advisory Board</b></li></ul>



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# Customer Centricity

with a focus on the Customer Experience

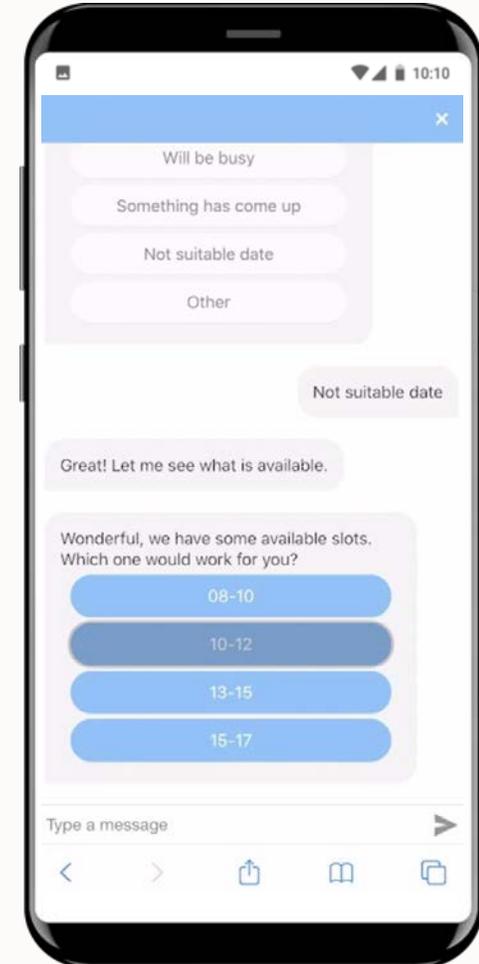
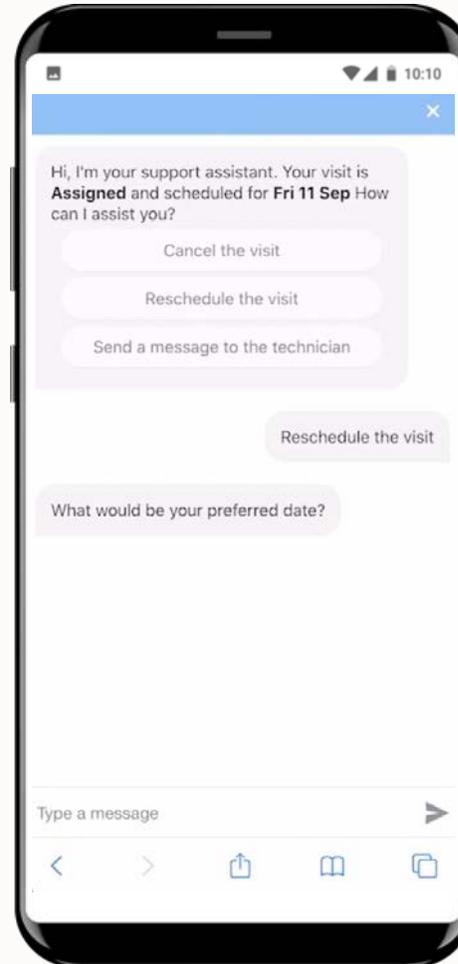




# Connected Customers

Where's My Tech and Oracle Digital Assistant

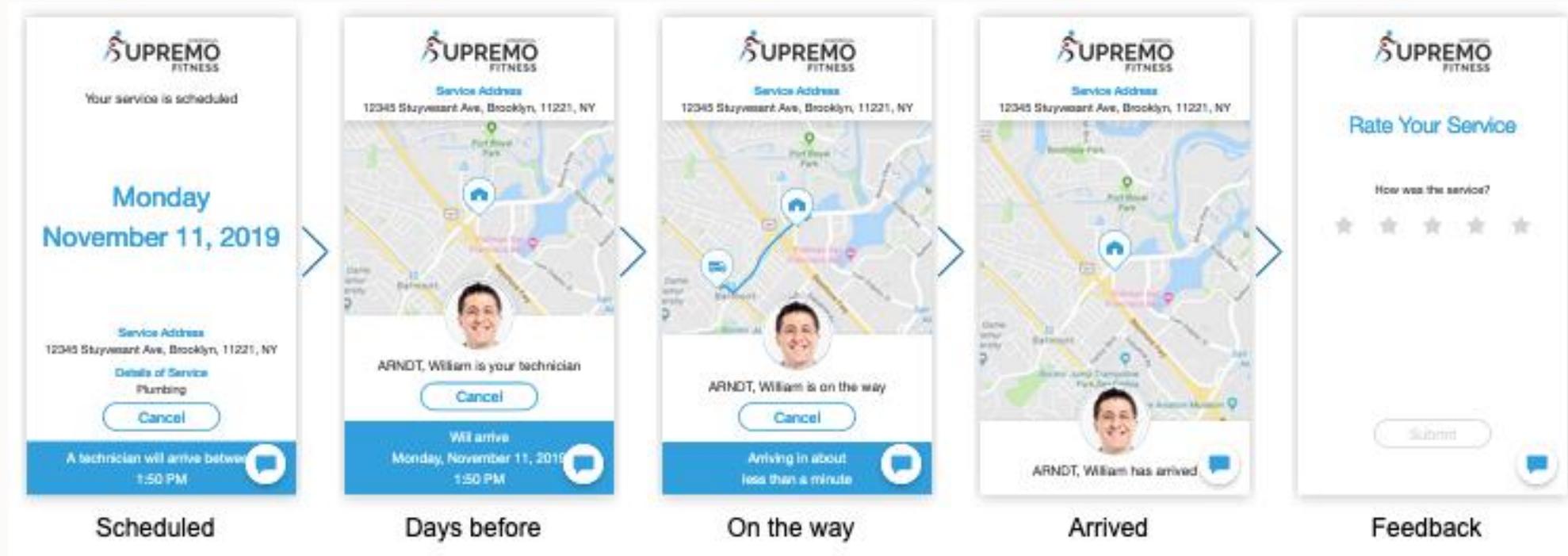
- Multi-lingual support in ODA chatbot (23A-B)
- Immediate notification(s) of the negative feedback (22D)
- Marketing and Post-Service Messaging including, external links (2023)





# Connected Customers

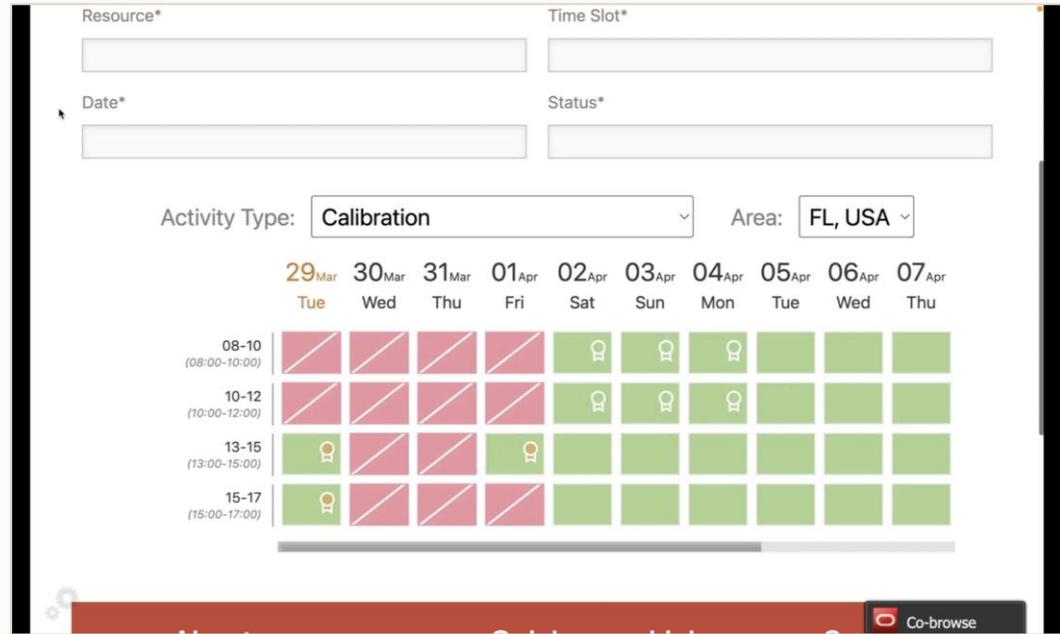
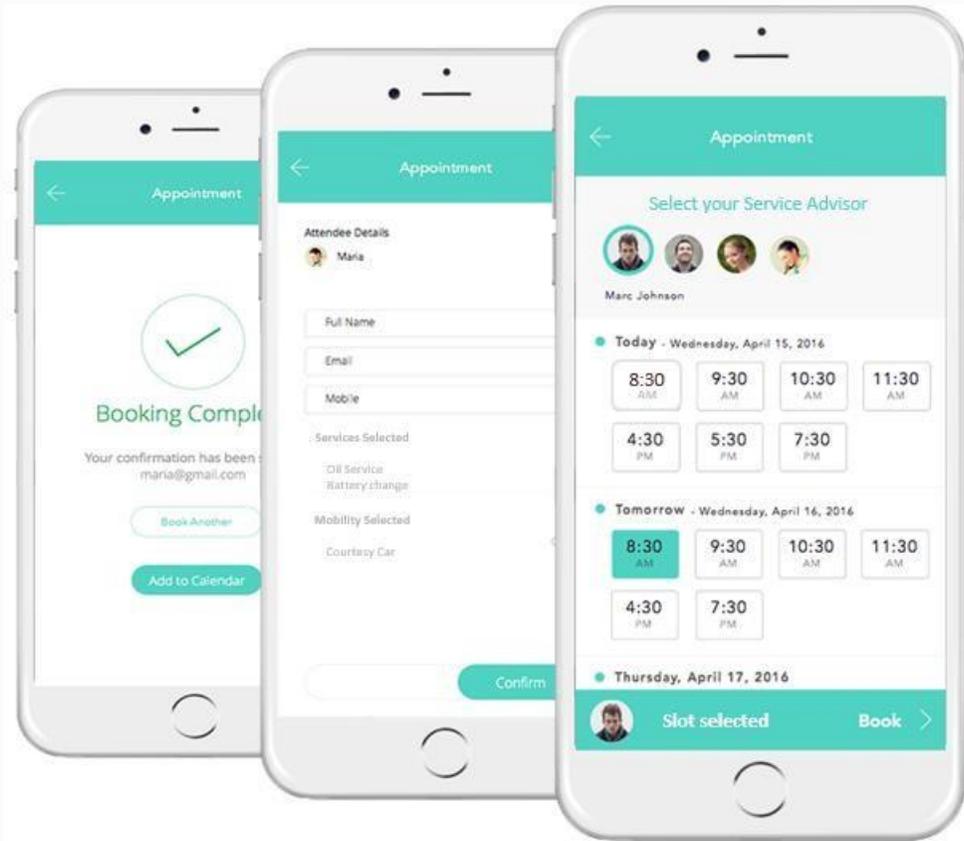
## Where's My Tech and Oracle Digital Assistant





# Booking Widget

Connecting your business with your customers





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# Worker-First Era

with a focus on the Mobile Workforce





# Self-Assignment

## KPI-Based Nearby Activities Workflow

### AI Driven Activity Recommendations (23A+)

**ORACLE** Search in activities or parts

↑ ARNDT, William Tuesday, December 20th, 2022

**Nearby Activities**

- 2 selected Duration 7:48 **Assign**
- 12:00 AM - 1126 E State Rd 434 - Prep Work (Multi-Day) **19 days overdue**
- 12:00 AM - 227 SAN GABRIEL ST - Corrective Maintenance - 08-10 **4 days overdue**
- 12:00 AM - 1126 E State Rd 434 - Prep Work (Multi-Day) **4 days overdue**
- 12:00 AM - 122 E State Rd 434 #B - Prep Work (Multi-Day) **Due in 1 day**
- 12:00 AM - 876 COPPERFIELD TER - Inspection - 15-17 **Due in 1 day**
- 12:00 AM - 1458 SUNSHADOW DR 100 - Corrective Maintenance - 15-17 **Due in 5 days**

Map overlay options:

- Route
- Resources
- Nearby activities
- Satellite

**ORACLE**

↑ ARNDT, William Dec 15th

**Nearby Activities**

- 2 selected Duration 1:36 **Assign**
- 12:00 AM - 1048 HORNBEAM ST - Estimate - All-Day
- 12:00 AM - 2845 CENTRAL DR - Estimate - All-Day
- 12:00 AM - 800 SANTA BARBARA RD 16 - Estimate - All-Day
- 12:00 AM - 2729 CHADDSFORD CIR 203 - Estimate - All-Day





# Workflow Manager

Guided experience for a hybrid workforce

Workflow Manager enhancements based on machine learning and analytics

- Predictions: status and completion time of each step to be analyzed based on companywide historical data
- Notifications and warnings to the technicians for predicted delays

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Dispatch Console

Activity Details  
Arndt, William, 02/03/23

Here is your flow for this activity

Security checklist Service auth request Take a break

Customer Information

Account

Name  
Juna Scheffler

Address  
3105 STONEBROOK DR

Project Forms

Work Order  
137150403

Severity

Activity Type  
Equipment Relocation

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Route

Activity Details  
DISNEY, Kathleen, 01/12/23

2:33

Here is your workflow for this activity Steps 1/4

Safety Checklist

Asset Validation

Preventative Maintenance

Debrief

Customer Information

Account

Name  
Mary Jones

Address  
2516 GRASSY POINT DR 100





# Forms Initiative

## Field Operations Driving Form Workflows

- High Volume Form Performance (23A)
- Forms Configuration Preview (23B)
- Dynamic Forms Launcher (23C)
- Shared Form Handoff & Completion (2023)

The image shows a mobile application interface for previewing a form configuration. At the top, there is a navigation bar with a menu icon, a search icon, and a message icon. Below the navigation bar, the screen displays the title "Preview" and "All Fields Form". The main content area is titled "Activity section" and contains several form fields:

- Activity type:** A dropdown menu with the selected value "Default Customer Activity Type".
- Access Schedule:** A text field with the value "Eastern" and an edit icon.
- Appt Number:** A text input field.
- City:** A text input field.
- Duration:** A section containing two fields: "hours" with a value of "0" and a dropdown arrow, and "minutes" with a value of "0" and a dropdown arrow.
- Country:** A dropdown menu.
- Cellular Phone:** A text input field.
- Email:** A text input field.

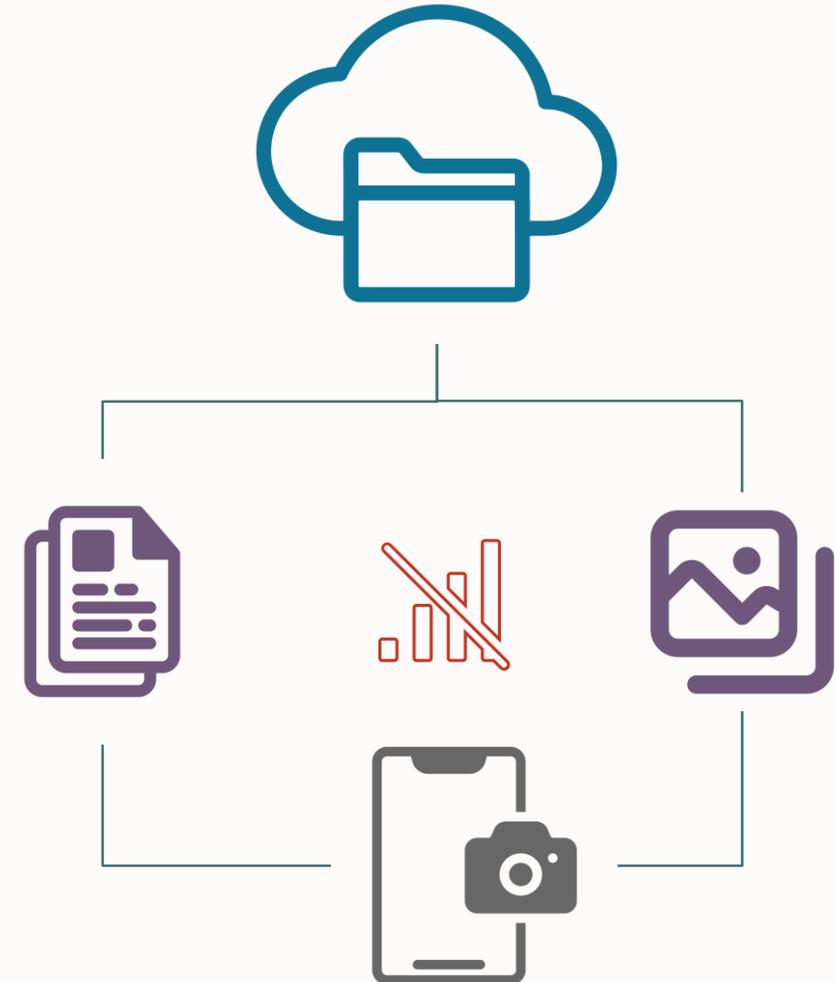




# Multimedia Library Initiative

Functional Enhancements and User Experience Improvements related to Files and Photos

- Migration from Device to In-App Camera (22C)
- Multiple Photo Capture/Uploads (23C/D)
- Image Compression Changes (23C/D)
- Integrated Cloud Storage Solution (23C/D)





# Empower Mobile Workforce

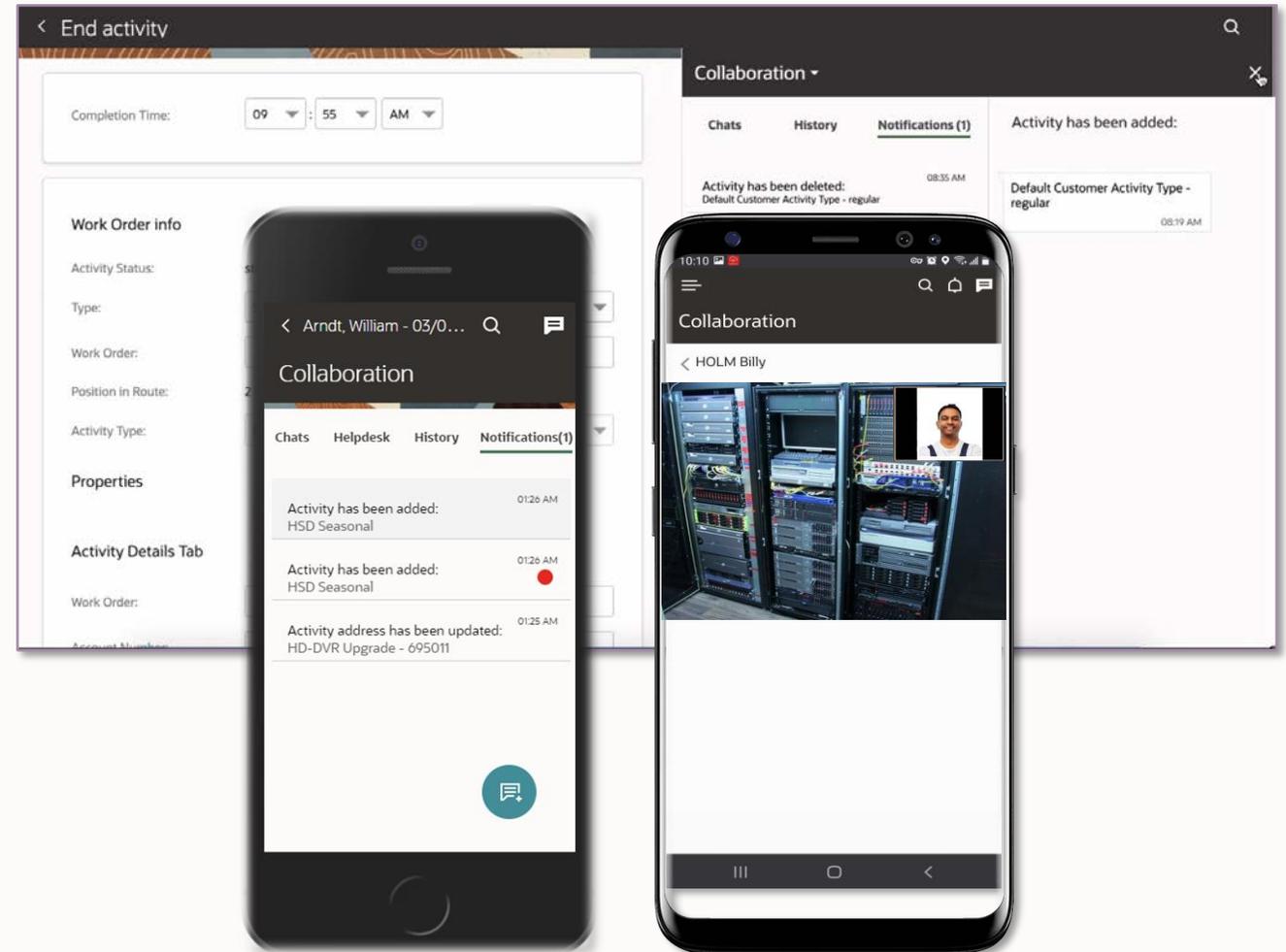
Connected Resources

## Collaboration Enhancements

- Collaboration analytics
- Asset History Chatbot within Collaboration
- Feedback – In Process

## 3<sup>rd</sup> Party Applications

- Zoom Integration
- MS Teams Integration





# Empower Mobile Workforce and Provide Remote Customer Service

Augmented reality and video solutions

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- Integrated partners' Augmented Reality solutions
  - EDXtechnologies, TechSee, CareAR
- Assets Visualizations
- Remote Assist



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# Agility and Adaptability

Streamlined Backoffice Operations

Connected Solutions

Performance and Reliability





# Routing Optimization & Statistics

Ongoing Optimization of Activity Routing and Predictability

- Routing Plan “What-If” Export/Import (23A)
- Simplified Routing Quick Start Plan
- Routing UX & ROI Metrics

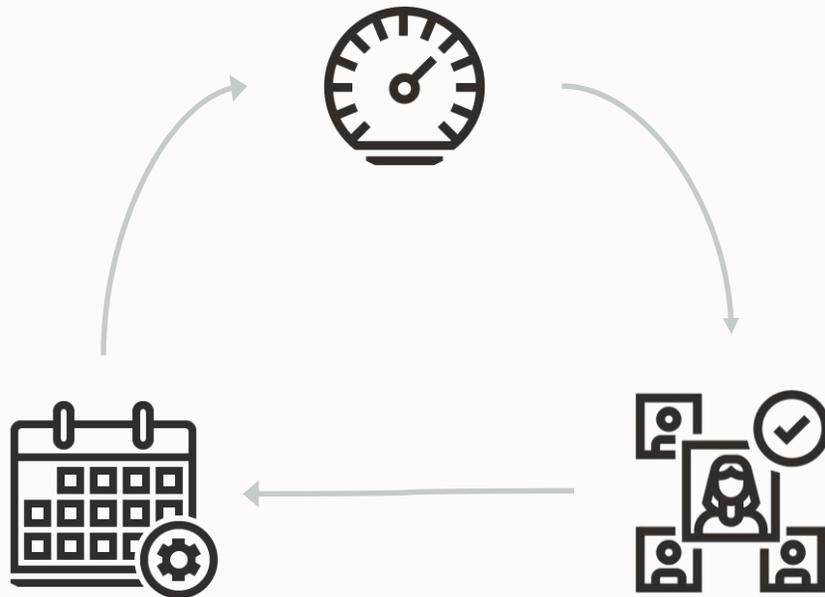
The image shows two overlapping UI components. The background component is a dialog box titled "Import Routing Plan". It features a dashed border area for "Drag and Drop" with the instruction "Select a file or drop one here.". Below this, it displays "Selected file: MaintenanceRoutingProfile\_BulkRouting.json" and "Size: 4478". At the bottom right, there are "Cancel" and "Import" buttons. The foreground component is a settings panel titled "Bulk Routing" with an upward arrow icon. It has a section for "Optimization Strategy" with a dropdown menu currently set to "Default". The dropdown menu is open, showing several options: "Default", "Maximize the number of assigned activities", "Maximize activities per resource ratio", "Minimize total travel", "Prioritize earlier start of most important activities" (which is highlighted), and "Reduce activities overdue".





# Quota & Capacity Management Initiative

Drive usability and analytics usage in planning and execution



- Enhancements in Support Quota Management for the 'time-slot' based booking via REST API (23B)
- UX Enhancements based on customer feedback (23B-C)
- Analytics enhancements for strategic planning (2023)

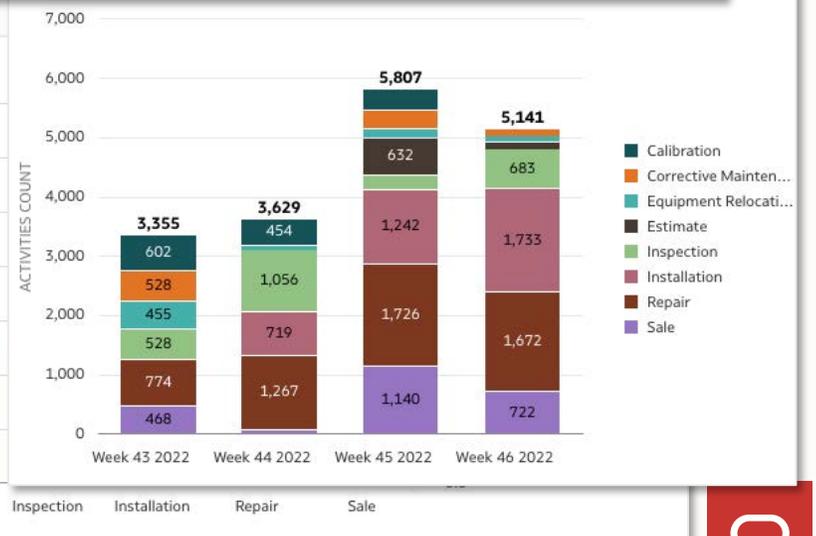
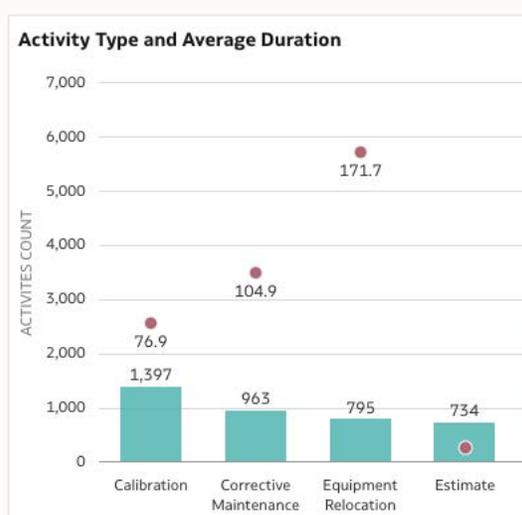
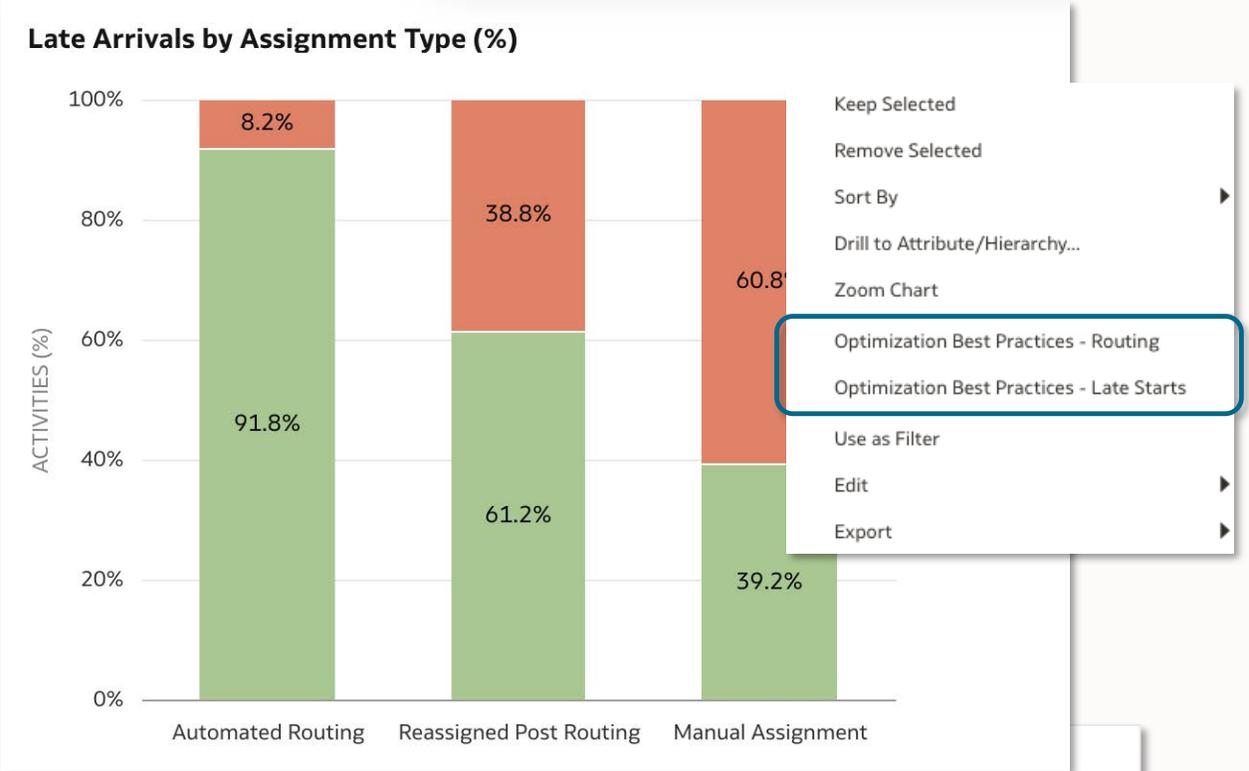
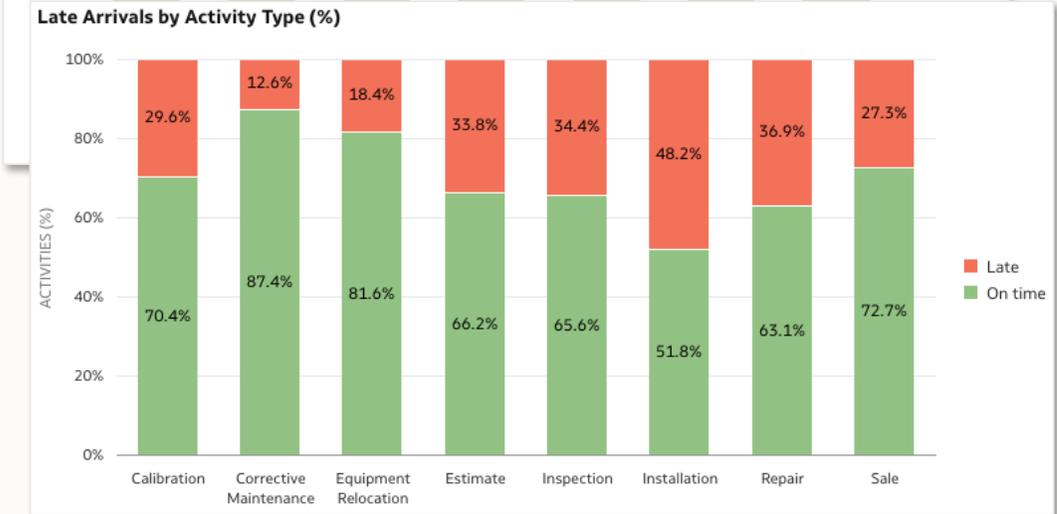


# Prebuilt Dashboards

**Total Activities**  
**17,932**

**Late Arrivals (%)**  
**34.8%**

**Routing Assignment (%)**  
**81.5%**



# Connected Solutions

- Connected and Extendable
  - HCM – Absence Management and Shift Patterns (released)
  - Enhancements in OFS-WACS
  - Enhancements in OFS-NMS
- Asset-Management Enhancements
  - Parts Return
  - Parts picking & packaging process



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# Plugin Framework and Library





# Plugin Library

The screenshot displays the Oracle Forms & Plugins configuration page. A modal dialog titled "Plugin Type" is open, showing four options: Standard Plugin, Plugin Archive (selected), External Plugin, and External Application. The background shows a list of plugins with details like "on\_my\_way" and "Configured Buttons".

The "Add Hosted Plugin" form is also visible, containing the following sections:

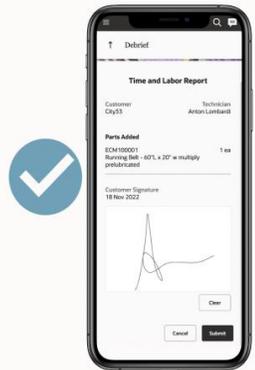
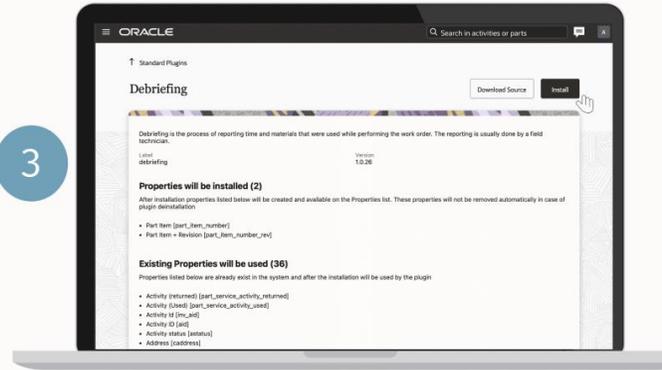
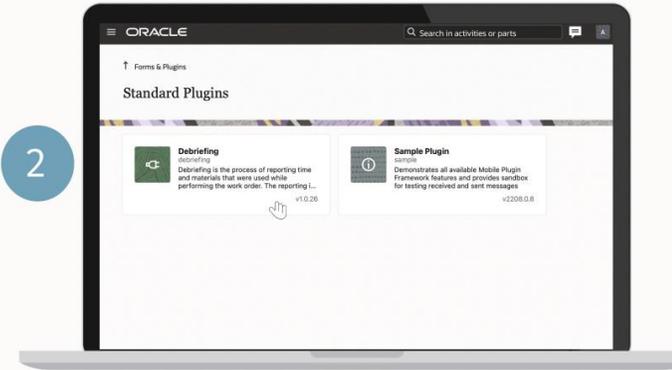
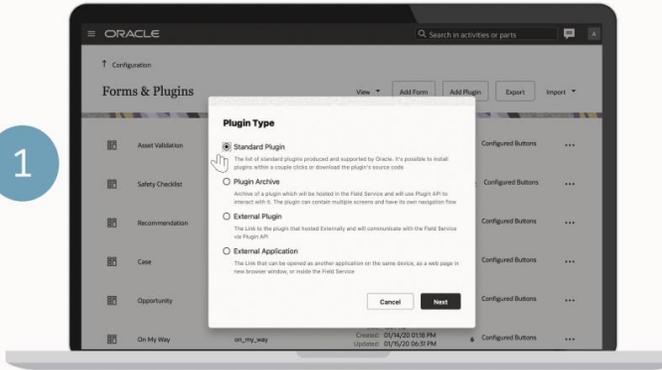
- General information:** Fields for Label, Entity, Visibility rules similar to, Name: English, Name: Greek, Name: Portuguese (Brazil), and Name: French (European).
- Plugin settings:** Includes a "Plugin archive" section with a "Show info" link, a "Drag and Drop" area for file selection, a "Selected file" field, a "Size" field, and a checkbox for "Disable Plugin in Offline".
- Secure parameters:** A section with a warning "Duplicate names are not allowed. Overall size should not exceed 5 KB." and a note "Parameters are not configured yet".
- Available Properties:** A section with a "Select values" field.





# Install Standard Plugin

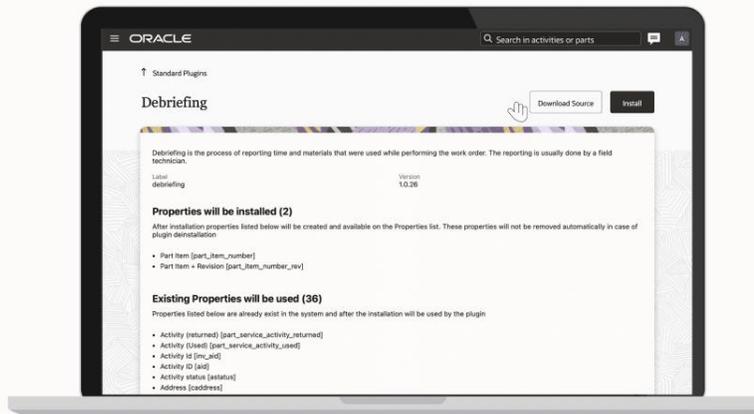
- Choose the Standard Plugin type while creating a new plugin
- Select required plugin:
  - Debriefing
  - Sample
- Verify properties to be used or/and installed for plugin. Confirm installation
- Open in App



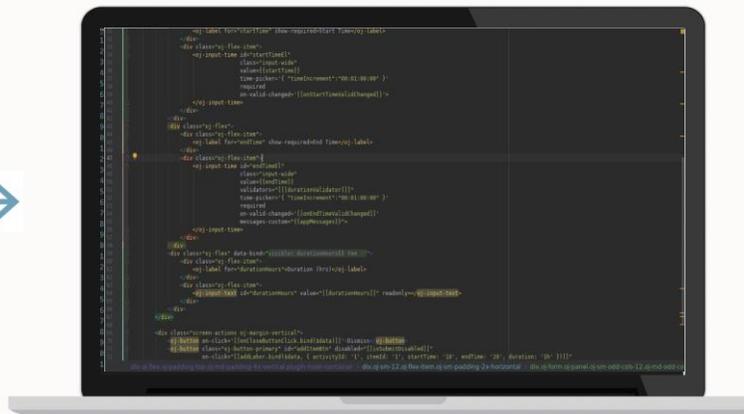


# Download the Source Code and Modify Plugin

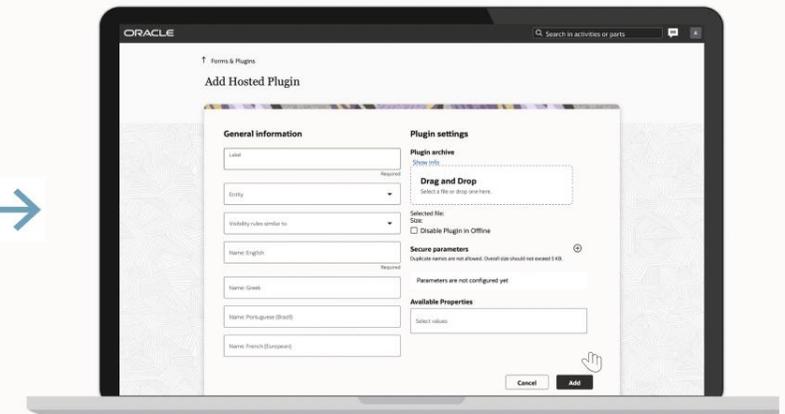
- Download the Source code



- Implement code change



- Upload as a Hosted Plugin via interface or Rest API



ORACLE

# Gig Economy





# Gig Economy & Worker

## Self-Onboarding and Self-Management

### Register 1/2

#### Your details

Name  
Leticia Bove

Phone  
5550033008

Email  
I

Address

Organization Name

Next

### Register 2/2

#### Which days can you work?

Monday  Friday  
 Tuesday  Saturday  
 Wednesday  Sunday  
 Thursday

#### Can you work full days?

Yes/No  
Y

#### What is your region?

What is your region?

#### Specify your skills

Installation  
 Repair  
 Estimate

Finish

### Homepage

#### Profile

Name  
BOVE, Leticia

Email Address  
33008@sunrise.demo

Phone  
555003300800

External ID  
33008

Time Format  
24-hour

Time Zone  
Eastern

#### Work Skills

↑ Homepage

#### Upcoming Work Orders

From 2022/06/28 To 2022/07/29 [Filter Activities](#)

Activity ID	Customer Name	Date	Duration	Status
4229175	Virgina Mckenna	2022-06-28	53	pending
4229200	Shonda Isselhardt	2022-06-28	42	pending
4229487	Judi Bahner	2022-06-30	53	pending
4229639	Judi Bahner	2022-07-01	53	pending

### Activity Details

Activity ID: 4229175

Activity Type: [ ]

Activity Work Skill: [ ]

Assigned Resource: 33008

Customer Name: Virgina Mckenna

Street Address: 325 SIR LAWRENCE DR

City: SANFORD

Postal Code: 327737418

Date: 06/28/2022

Duration: 53

Start Time: 2022-06-28 15:00:00

End Time: 2022-06-28 15:53:00

Status: [ ]

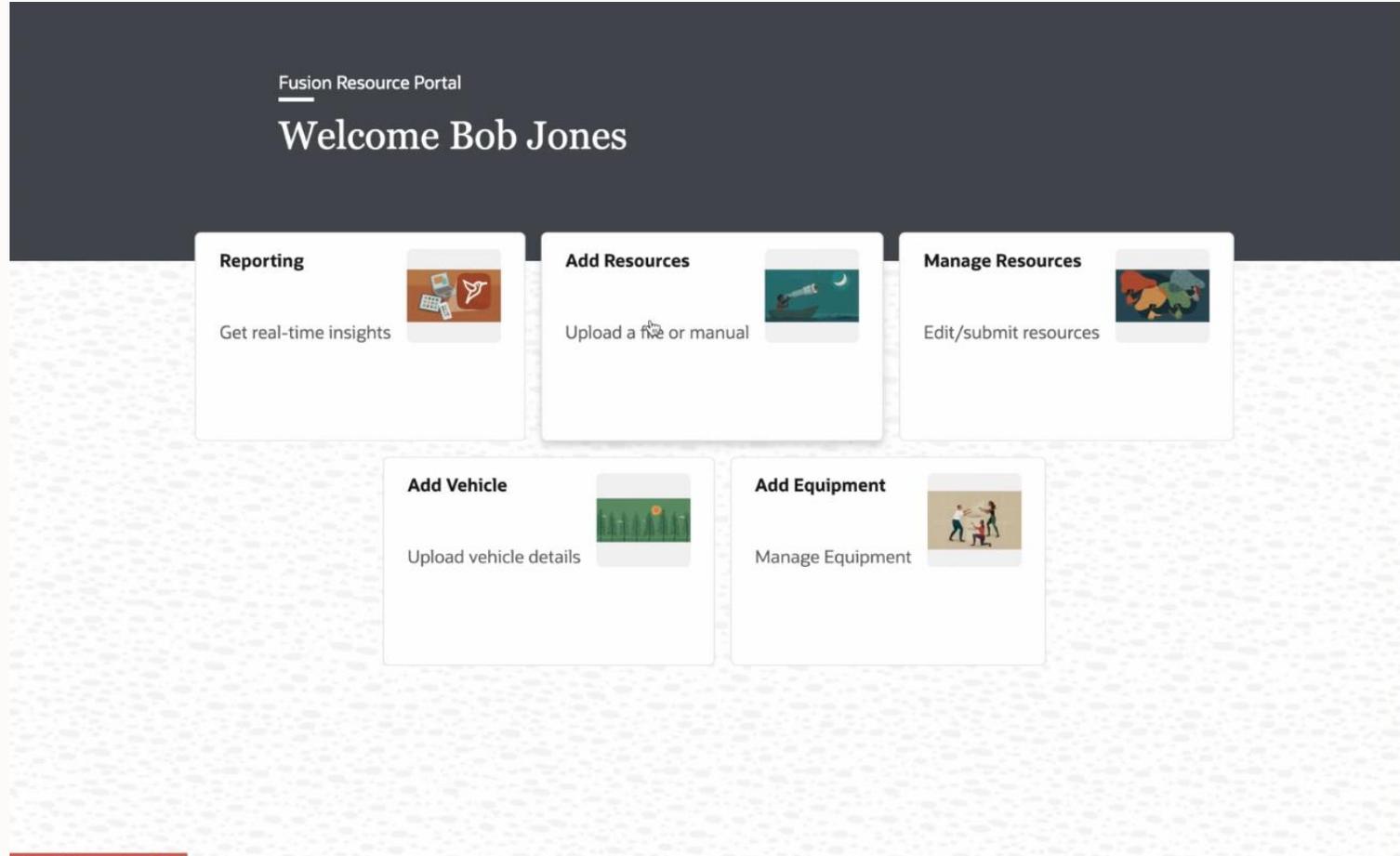
325 Sir Lawrence Dr  
325 Sir Lawrence Dr, Sanford, FL 32773, USA





# Gig Economy & Worker

## 3<sup>rd</sup> Party Contract Companies





# Gig Economy & Worker

## 3<sup>rd</sup> Party Contract Companies

The screenshot displays two overlapping web application windows. The background window is titled 'Add Resources' and features an 'Upload File:' section with a 'Drag and Drop' area and a file list named 'list\_resources.csv'. The foreground window is titled 'Confirm Resources' and contains a table with columns for Name, Phone, Role, State, Status, Type of Lodging, Email, Division, and Crew. The table lists several resources, with 'Jere' selected. Above the table are buttons for 'Approve', 'Reject', and 'Multi Edit', along with an 'Edit data' toggle switch.

**Add Resources**

Upload File:

**Drag and Drop**  
Select a file or drop one here.

list\_resources.csv

Name	Email	Phone	Crew
Leah N			
Jean P			
Marta			
Steven			
Brian M			
Jessica			
Harry			
Emory			
William			
Charle			

**Confirm Resources**

Approve Reject Multi Edit

Edit data

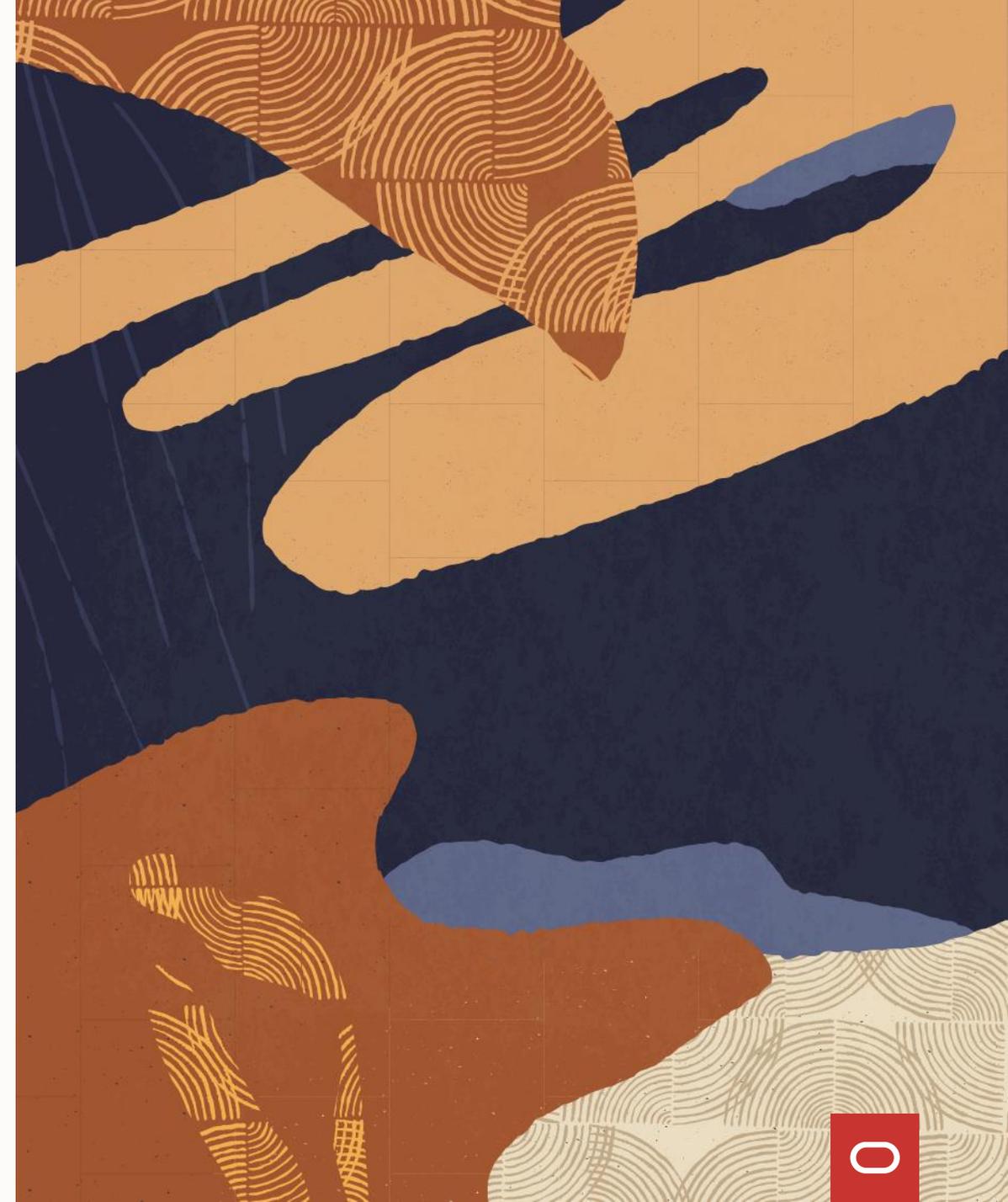
Name	Phone	Role	State	Status	Type of Lodging	Email	Division	Crew
<input type="checkbox"/> Gort	602 551 5014		CA					602 551 5014
<input checked="" type="checkbox"/> Jere								
<input type="checkbox"/> Tom								
<input type="checkbox"/> Aug								
<input type="checkbox"/> Ken								
<input type="checkbox"/> Jear								
<input type="checkbox"/> Johr								
<input type="checkbox"/> Phili								



# Thank you



**Questions?**



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