Lab Guide

Facilities:

Optimize Work Management

Ric Hermans & Ralf Schnell

Default Login / Password:

admin / LabPass

itil / LabPass

employee / LabPass

Lab Sponsored by Amazon Web Services



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Lab Goal

This first lab includes the steps required to access your instance and prepare to complete this lab.

Lab 1
Access Your Instance

Log On to Your Lab Instance

1. Navigate to the unique instance URL provided.
2. Log in with the provided administrator credentials.



Lab Goal

This lab includes the steps required to set up your lab instance.

Lab 1.1
Lab Configuration

Plugin Confirmation

1. Navigate to **System Definition>Plugins**.
2. Confirm that the following plugins have been enabled:

   Field Service Management Mobile
   Field Service Management GEO Location Demo Data
   Performance Analytics Content Pack – Field Service Management
   Facilities Visualization Workbench
   SM Planned Maintenance
   Customer Service Management Demo Data

Lab Goal

Lab 1.2 Configure the Facilities Application

This lab explores the basic configuration of the Facilities application. You do not make a lot of changes to the default configuration – the main goal of this lab is for you to familiarize yourself with the available configuration options.

Configure Application Properties

1. In the application menu, navigate to **Facilities > Administration > Properties**.

2. Review the available options. You may make changes, but the following labs work with the default configuration.

Facilities Configuration

1. Navigate to **Facilities > Administration > Configuration**.

2. Review the available options. For the following labs, you make several changes to the default configuration.

3. On the Business Process tab:

   Process lifecycle: **request-driven** (subtasks are optional)
   Agent must accept or reject the assigned task: **True**
   Work notes are required to close or cancel a request or task: **True**

4. On the Assignment tab:

   Assignment method for requests: **manually**.
   Assignment method for tasks: **manually**

5. Click **Save**.

Lab Goal

This lab explains how to use Facility Request Templates to auto generate assigned tasks and accomplish work in a planned manner.

Lab 2.0 Create a Facilities Request Template

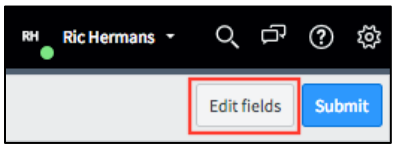
Create a Facility Request Template

1. Select Facilities > Catalog & Knowledge > Facilities Request Templates from the left navigation bar.

2. At the top of the list view click **New**.

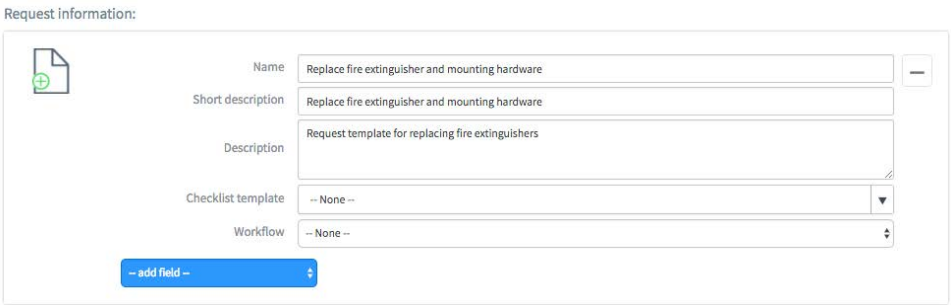


3. At the Facilities Request Form, click **Edit fields** in the top-right. This enables the template to be configured in a later step in this lab.



4. Enter the following information in the **Request information** section:

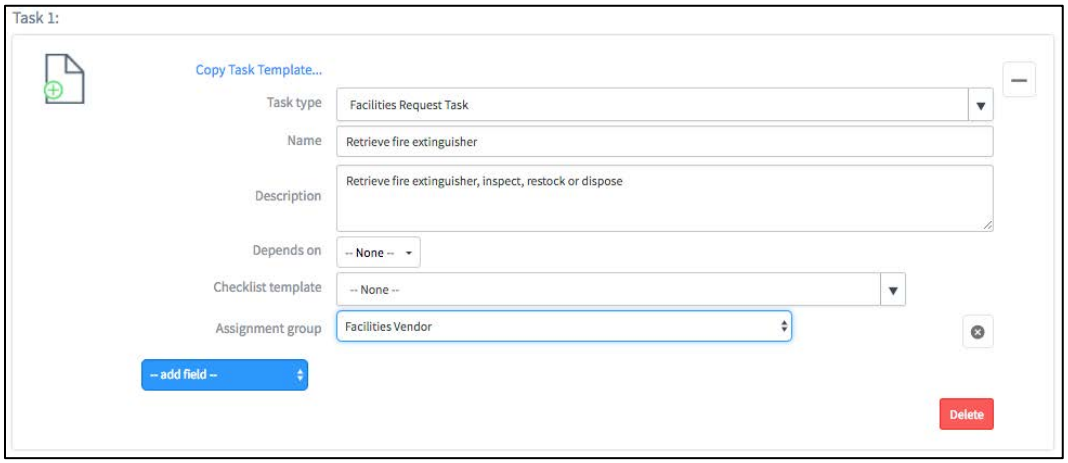
   Name: **Replace fire extinguisher and mounting hardware**
   Short description: **Replace fire extinguisher and mounting hardware**
   Description: **Request template for replacing fire extinguishers**



5. Enter the following information in the **Task 1** section:

   Name: **Retrieve fire extinguisher**
   Description: **Retrieve fire extinguisher, inspect, restock or dispose**

6. In the **—add field—** drop-down list, select **Assignment group.**
   Assignment group: **Facilities Vendor**
   Note*:* Task 2 automatically appears as blank as soon as the preceding task, Task 1 in this case, has a value in the Name field. However, when applying the template to a facilities request, it will not generate a blank task.

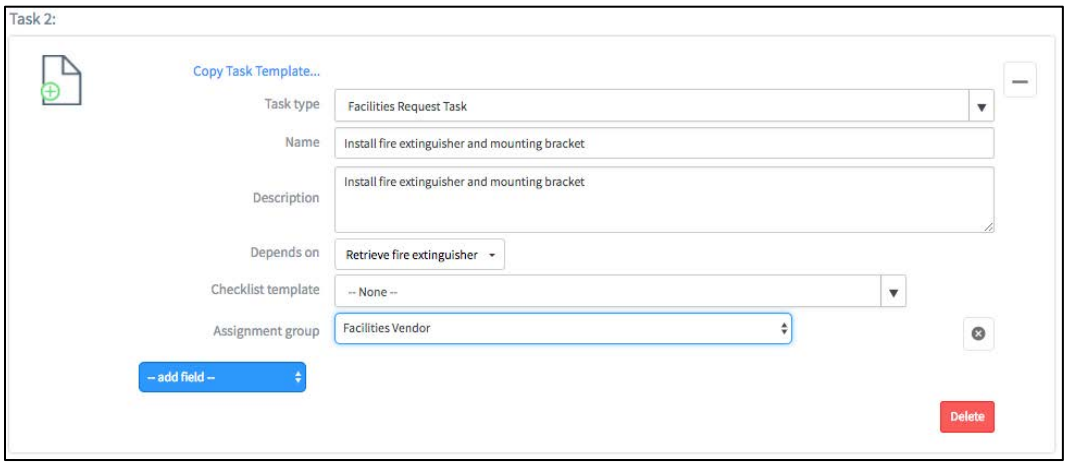


7. Enter the following information in the Task 2 section:

   Name: Install fire extinguisher and mounting bracket
   Description: Install fire extinguisher and mounting bracket if required
   Depends on: Retrieve fire extinguisher

   In the —add field— drop-down list, select Assignment group.

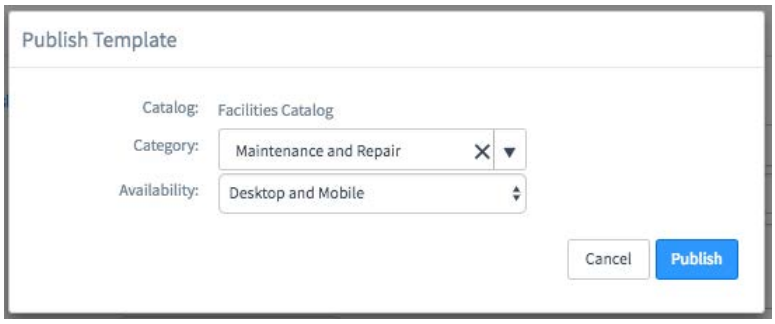
   Assignment group: Facilities Vendor



8. Click **Submit**.

9. A dialog box appears that prompts you for additional information. Fill out the following:

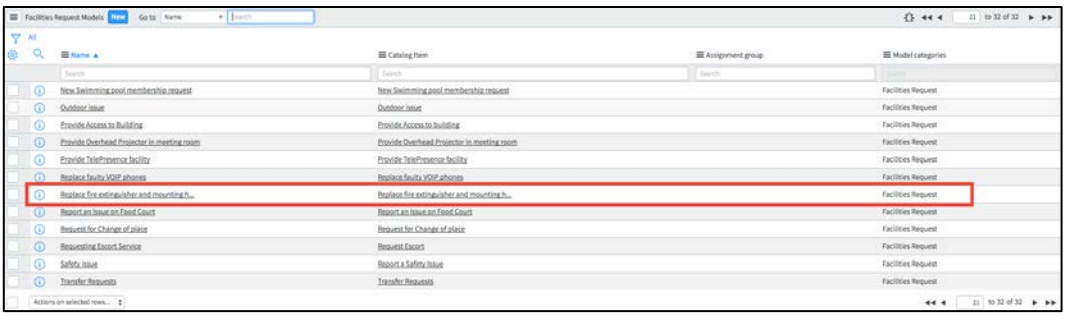
   Category: **Maintenance and Repair**
   Availability: **Desktop and Mobile**



10. Click **Publish**.

Lab Success Verification

1. Select **Facilities > Catalog & Knowledge > Facilities Request Templates** from the left navigation bar and confirm the record with the name **Replace fire extinguisher and mounting hardware** appears.



Lab Goal

This lab explains how to automate a Facilities Request using components that were created in the previous sections.

Lab 2.1 Facilities Request & Tasks

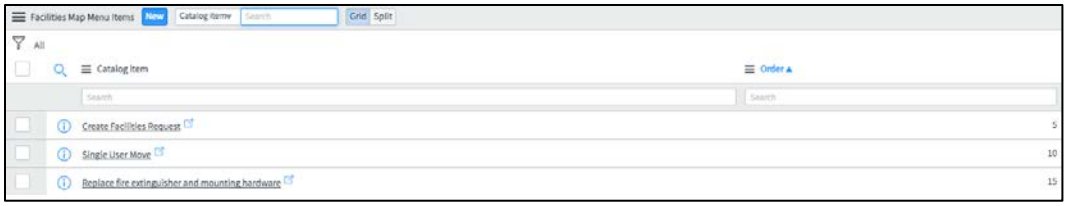
Create a Facility Request using the Workbench

First, we will add a new menu item to the Facilities Workbench for the Fire Extinguishers.

1. Select **Facilities > Workbench Configuration > Map Menu Items** from the left navigation bar.
2. At the top of the list view, click **New.**
3. When taken to the Facilities Map Menu Items form, enter:

   Catalog Item: **Replace fire extinguisher and mounting hardware**
   Order: **15**

4. Click **Submit**.



5. Select **Facilities > Facility Maps > Workbench > San Diego Campus Building 1** from the left navigation bar.

6. Click on a Fire Extinguisher.

   Note: In the pane on the right tabs **Spaces**, **Tasks**, **Moves** and **Zones** are shown. **Spaces** contains the sections **Room Information** and **Related Links**.

7. Click the link **Replace fire extinguisher and mounting hardware**.

8. A dialog box appears which shows the information entered when creating the Facilities Request Template.



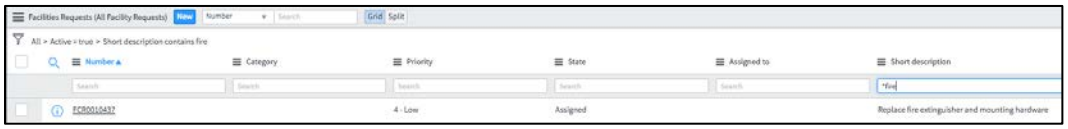
9. Click **Submit**.

Not done in this lab: For this request to show up in the workbench as a task, you need to add some variables to the item – model the create facilities request.

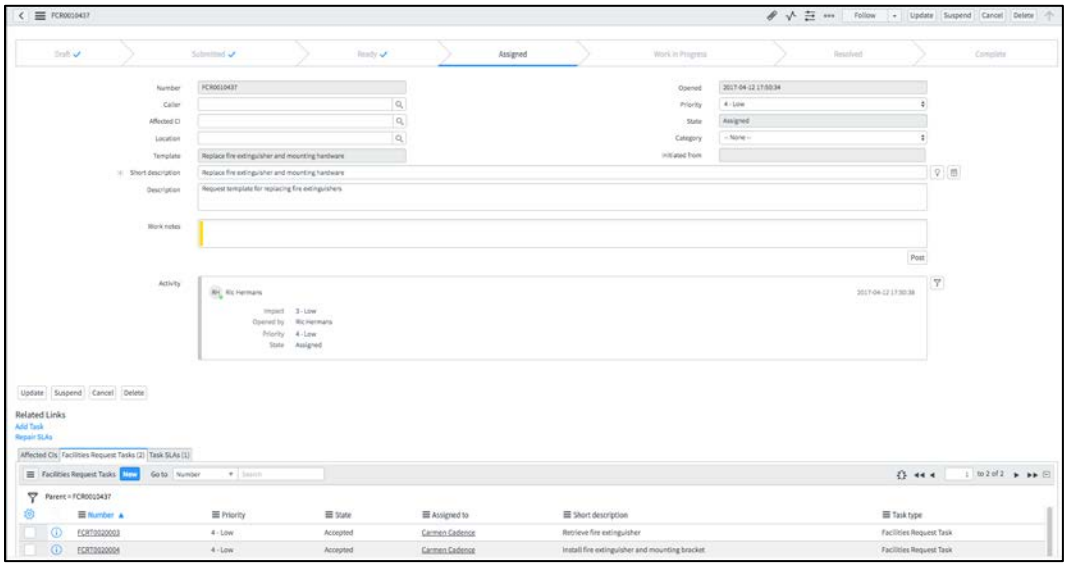
Lab Success Verification

1. Select **Facilities > Requests > All Facility Requests** from the left navigation bar.

2. Search for the just created facilities request by entering ***fire** into the Short Description filter field and press **Enter**.



3. Click on the request number, which takes you to the **Facilities Request** form.



4. Scroll down; there are two tasks ready to be worked by Carmen Cadence. Open one and note it is assigned to the group: **Facilities Vendor**.



Lab Goal

This lab guides through the setup of the Facilities Skills Management UI, equivalent to the **IT Skills Management** UI provided with the Skills Management application.

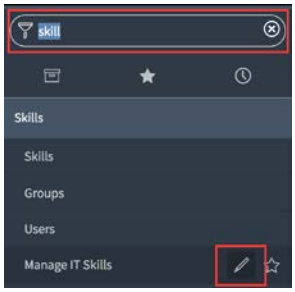
Lab 2.2 Facilities Skills Management

Create the Manage Facilities Skills Menu Module

1. Select **Skills > Manage IT Skills** from the left navigation bar.

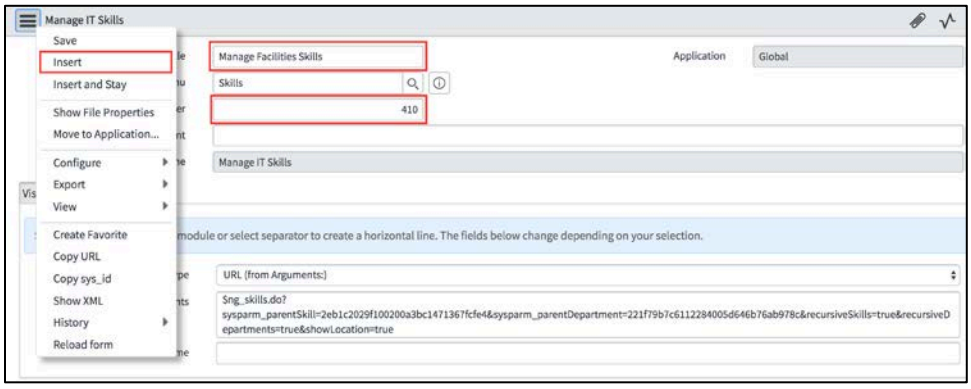
   Note: Type **skill** in the Navigation filter field above the navigation bar to limit the number of navigation menu options.

2. Click on the **pencil** symbol on the right of the **Skills > Manage IT Skills** menu item.

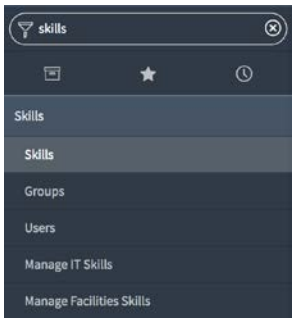


3. The menu definition record of the **Manage IT Skills module** appears. You copy this record to create the new module. In the **name** field enter **Manage Facilities Skills** and increase the **Order** with **10**.

4. Right-click in the header of the form or click on the **Additional actions** icon and select **Insert**.



5. Refresh your browser for the new module to appear under the **Skills** application. This is because the Application Menu on the left is cached, so you need to refresh the cache.



6. The URL that both the **Manage IT Skills** and **Manage Facilities Skills** modules refer to contain two parameters: parentSkill and parentDepartment.

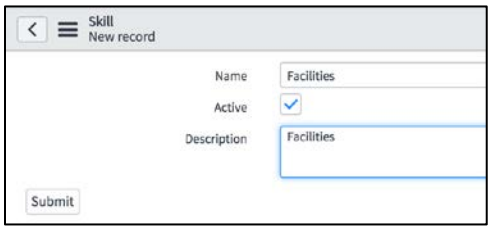
7. For the Manage Facilities Skills module to work you need to define the parent skill **Facilities**.

8. Select **Skills > Skills** from the left navigation bar.

9. At the top of the list view, click New.

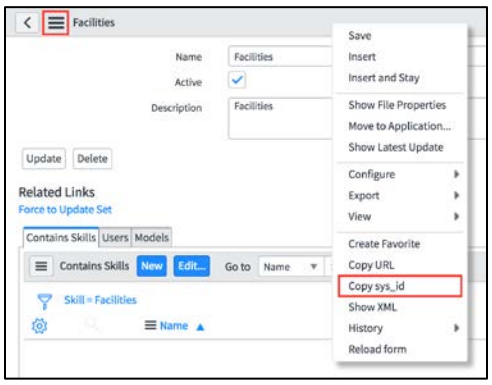
10. When taken to the Skills form, enter:

    Name: **Facilities**
    Description: **Facilities**



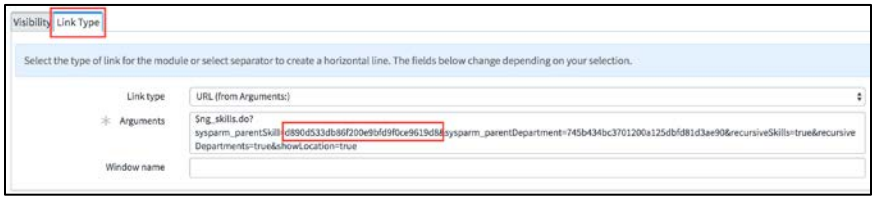
11. Right-click in the header of the form or click on the **Additional actions** icon and select **Save**.

12. Right-click again in the header of the form or click on the **Additional actions** icon and select **Copy sys_id**.



13. The **sys_id** of the Facilities skill record has now been copied on your clipboard.

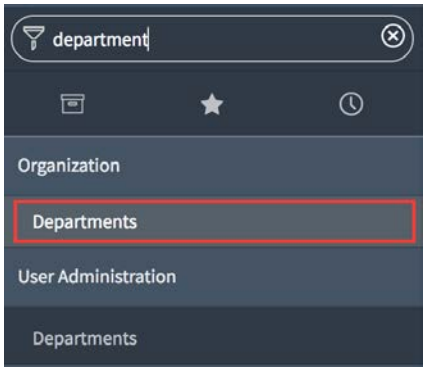
14. Open the **Manage Facilities Skills** application module record like you did with the **Manage IT Skills** record previously at the beginning of this lab. This shows the URL with the **parentSkill** and the **parentDepartment** parameters.



15. Replace the value of the **parentSkill** parameter, all the characters between the **'='** and the **'&'**, with the **sys_id** value on the clipboard.

16. Click **Update**.

17. Select **Organization > Departments** from the left navigation bar.

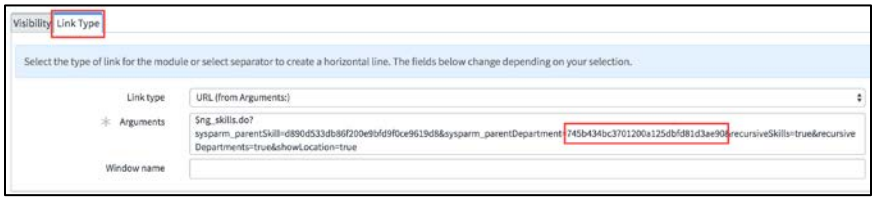


18. Select the **Facilities** department.

19. Copy the **sys_id** of the **Facilities** department to the clipboard like you did with the **Facilities** skill in step 8.

20. Open the **Manage Facilities Skills** application module record like you did in step 9.

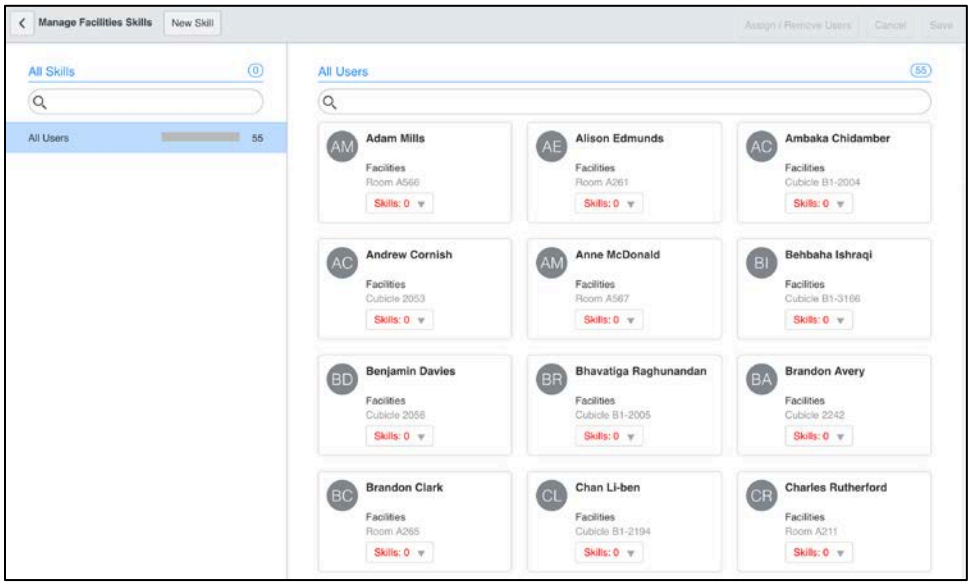
21. Replace the value of the **parentDepartment** parameter, all the characters between the **'='** and the **'&'**, with the sys_id value on the clipboard.



with the Manage IT Skills record previously in Step 1. This will show the URL with the parentSkill and the **parentDepartment** parameters.

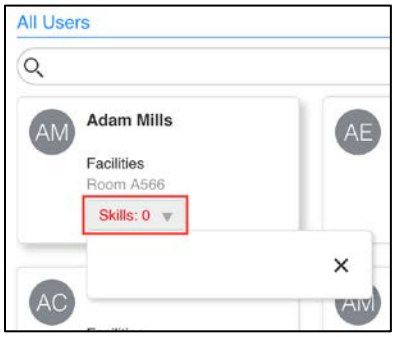
22. Click **Update**.

23. Click **Manage Facilities Skills**.



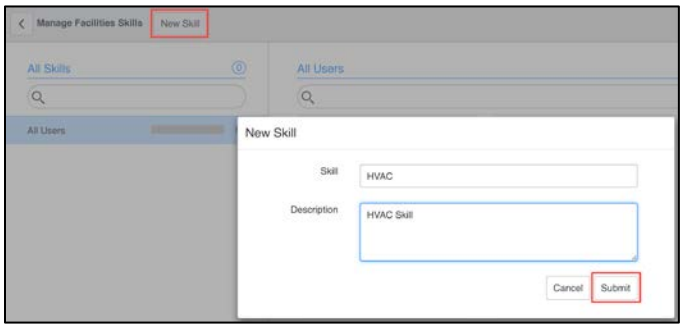
Since no skills have been defined yet referring to the **Facilities** skill, this page only shows the users belonging to the **Facilities** department.

Also, clicking on **Adam Mills** Skills selection field reveals no available skills.



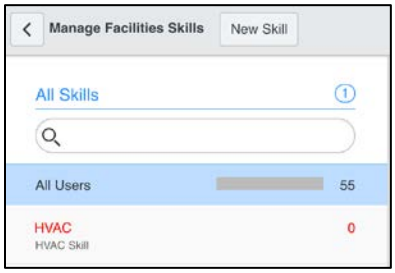
24. Click **New Skill** and enter:

    Skill: **HVAC**
    Description: **HVAC Skill**

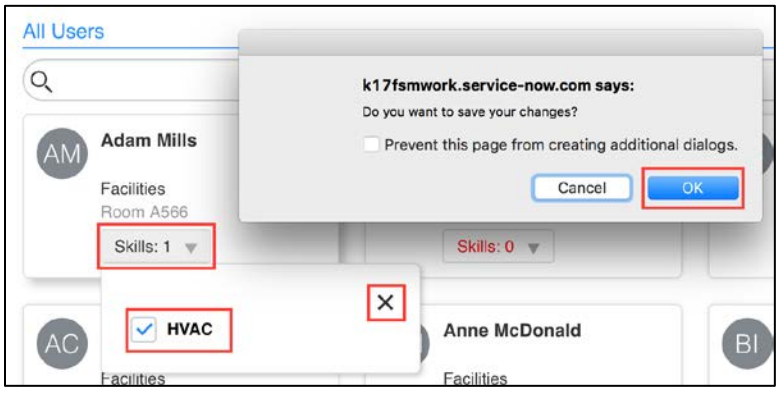


25. Click **Submit**.

26. The new Facilities skill HVAC will show in the list on the left, with zero users that have this skill assigned.

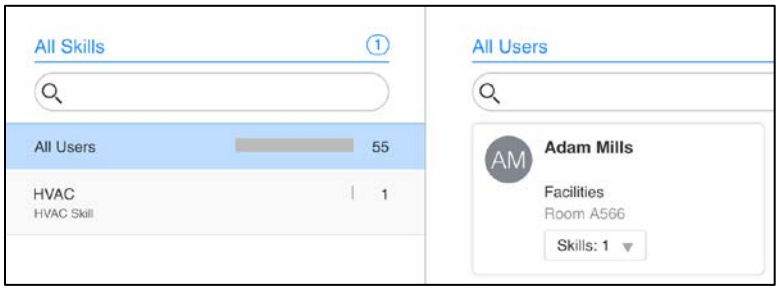


27. Assign the **HVAC** skill to **Adam Mills** by clicking on the Skills selection field; mark the appropriate skill; click on the **X** and on **OK** to save the changes.

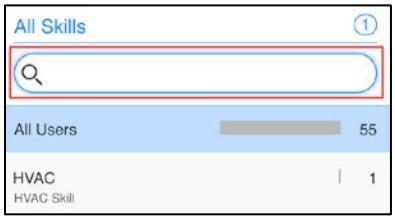


Note: Available items in the drop-down list now reflect the items in the **Skills** list on the left.

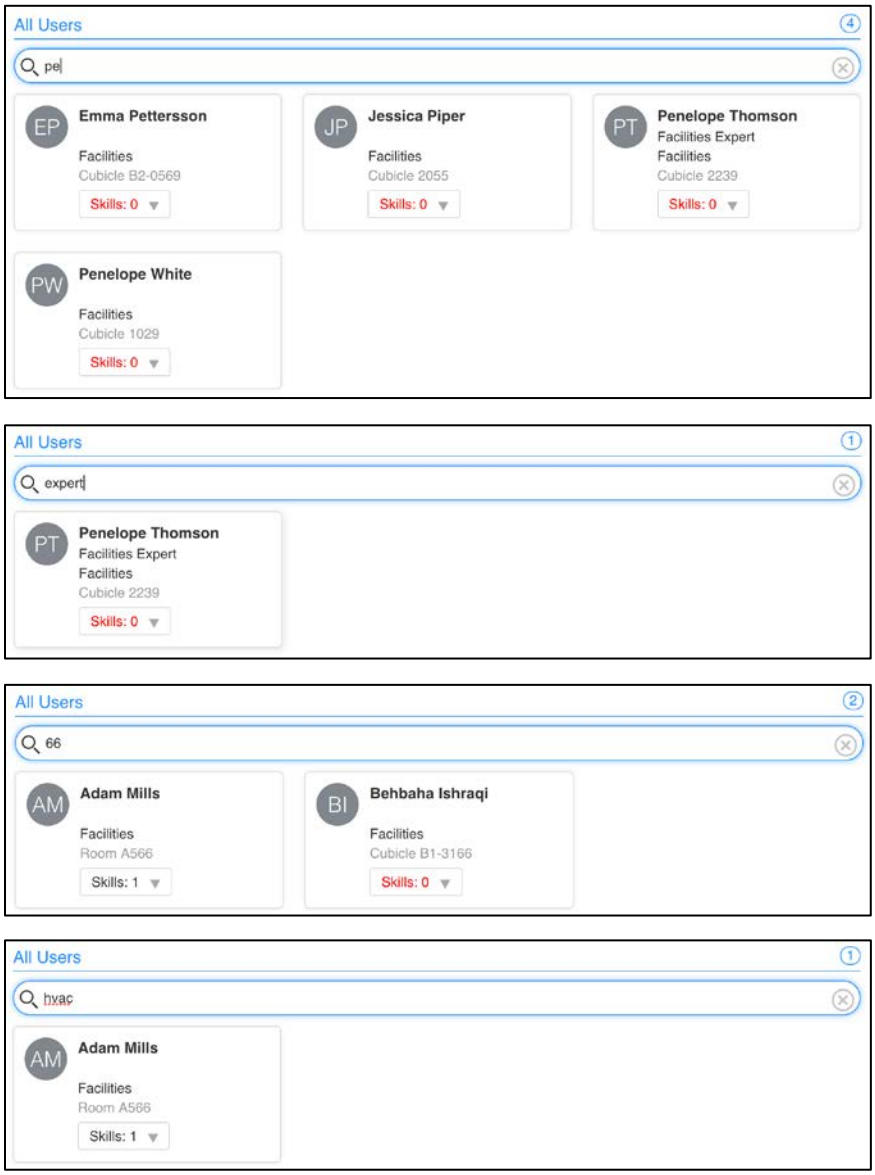
28. The result should look like the example.



29. Use the **Skills filter field** to filter on appropriate skills.



30. Use the **Users filter field** to filter on users by name, title, location, and skill.



Lab Goal

This lab guides you through the creation of a new asset class for a Facilities asset, its product category and model, the data structure, application menu entry, form layout, and parsing configuration for the Facilities Workbench.

Lab 3.0
Create a New Asset Class

Product Catalog Steps

To create assets from a new asset class, you first need to prepare the Product Catalog with a new model category and product models. This ensures that you have the data structure required to store all relevant attributes of the assets and that the processes covering the asset life cycle from order to decommissioning are fully functional.

> **Note**: IT would usually store these attributes within Configuration Item (CI) records. This is possible for facilities assets as well, but since the focus of facilities departments tends to be on assets rather than Cis, we recommend keeping the attributes within the asset table.

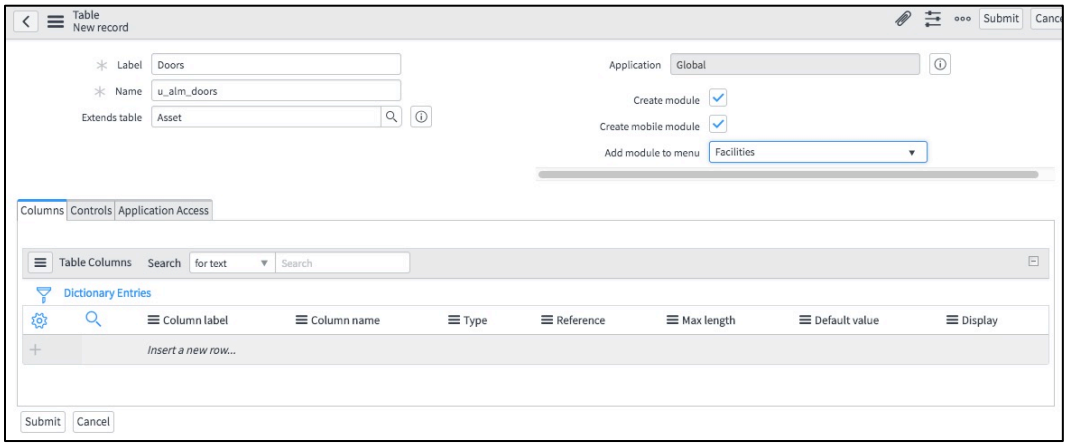
In this exercise, you create the required configuration to track doors as facilities assets, and link them to other assets already present in the system (e.g., card readers).

Create Asset Table

1. Log in to your instance as the **System Administrator**.
2. Navigate to **System Definition - Tables & Columns**.
3. Click **Create Table**.

4. Fill in the following information:

   Label: **Doors**
   Name: **u_alm_doors** (Note: Use alm to denote tables extending the asset table)
   Extends table: **alm_asset**
   Create module: **True**
   Create mobile module: **True**
   Add module to menu: **Facilities**



   Do NOT click Submit yet!

5. Go to the tab Controls.

   Set Create access controls to **False**
   Set Auto number to **True**
   Set Prefix to **DOOR**

6. Go to the tab Application Access. Make sure the form is populated as follows:

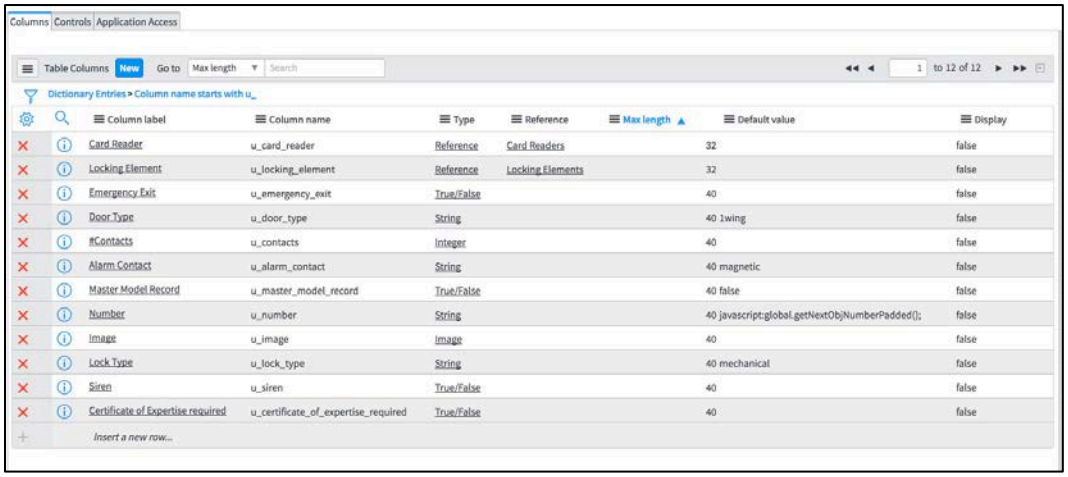
   Accessible from: **All application scopes**
   Can read: **True**
   Can create: **True**
   Can update: **True**
   Can delete: **True**
   Allow access … via web services: **True**
   Allow configuration: **True**

7. Click **Save** in the forms context menu.

The new table is now prepopulated with all fields defined in the **alm_asset** table. The next step is to add custom fields to store our relevant attributes for this new asset class.

8. Go to the tab **Columns**.

9. Add the new fields one by one, by double-clicking on **Insert** a new row. Make sure all fields are created as shown in the image below.



10. Click **Update** to finish creating the new table.

Create Model Category

Now create a model category. It points to the new table and ensures that all product models for doors inherit the relevant attributes. The model category also controls whether an asset is automatically linked to a CI.

1. Navigate to **Product Catalog - Model Categories**.

2. Click **New** to start creating the model category for doors.

3. Fill in the information as shown below:

   Name: **Doors**
   CI class: **-- None --**
   Asset class **u_ualm_doors** (our newly created table)
   Allow pre-allocation: **True**
   Allow in bundle: **True**
   Allow as master: **True**



4. Click **Submit**.

Create Product Models

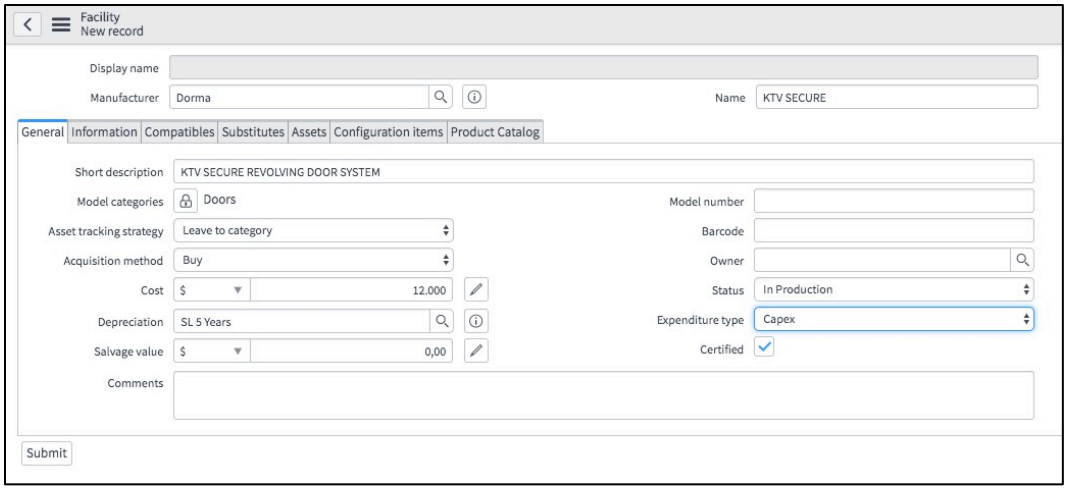
Now create two product models for doors. Unlike the category, which is generic, the product model is a reference to a specific piece of hardware or software that is either built in-house or build and maintained by a manufacturer. A product model can also be published to a Service Catalog as an orderable content item.

1. Navigate to **Product Catalog - Facility Models**.

2. Click **New** to start creating a new model.

3. Fill in the form with the information shown below:

   Manufacturer: **Dorma**
   Name: **KTV SECURE**
   Short description: **KTV SECURE REVOLVING DOOR SYSTEM**
   Model categories: **Doors**
   Asset tracking strategy: **Leave to category**
   Acquisition method: **Buy**
   Cost: **$12.000**
   Depreciation: **SL 5 Years**
   Status: **In Production**
   Expenditure Type: **Capex**
   Certified: **True**



4. Click **Submit**.

5. Repeat the steps above for the second product model:

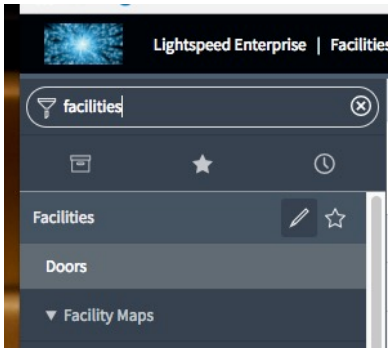
   Manufacturer: **Dorma**
   Name: **ST Flex**
   Short description: **ST Flex SECURE SLIDING DOOR**
   Model categories: **Doors**
   Asset tracking strategy: **Leave to category**
   Acquisition method: **Buy**
   Cost: **$18.000**
   Depreciation: **SL 5 Years**
   Status: **In Production**
   Expenditure Type: **Capex**
   Certified: **True**

Facilities Application Steps—Configure Application Menu

When you created the table Doors, you also created a module in the Facilities application. All you need to do now is put it in the right place within the application menu!

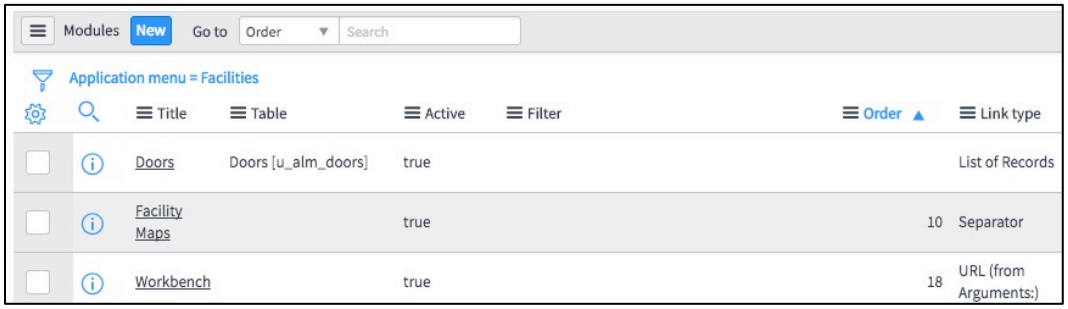
1. Navigate to **Facilities**.

2. Hover the mouse over the application entry Facilities to display the edit option (pencil).



3. Click on the **pencil** to start editing the application menu.

4. Note that Doors is currently the top entry in the related list Modules – this is because there is no value for Order.



5. Scroll the related list to find the section containing Facilities Assets. You want to put Doors between Controllers and Elevators. Which value should you choose for Order?

6. Scroll back to the beginning of the related list (or use the search bar) to find the entry for Doors.

7. Enter the required value for Order by double-clicking the **cell** in the list view.

8. Click **Update** on the application menu form.

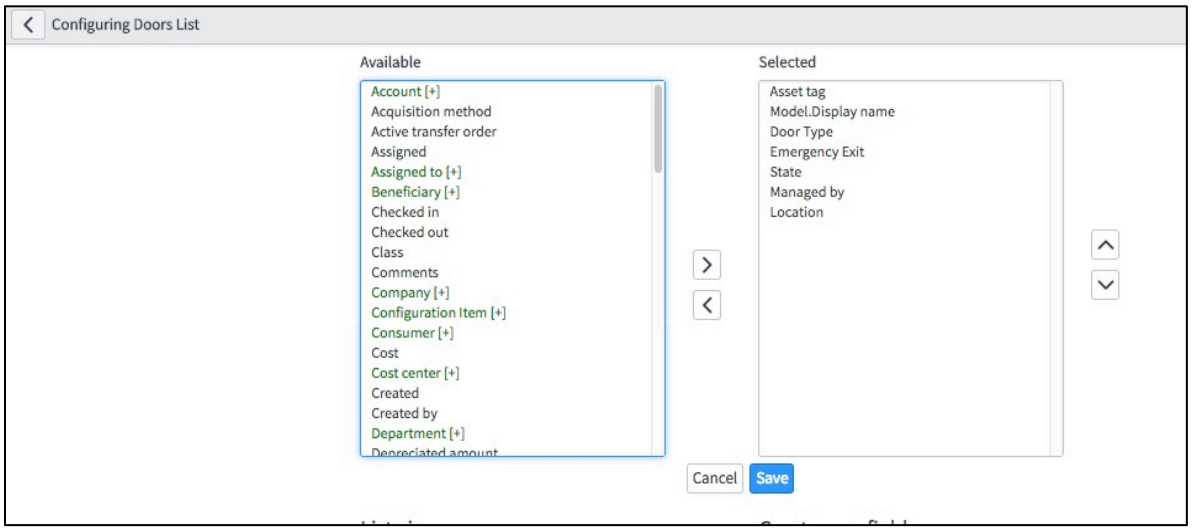
9. Scroll down the application menu on the left. Doors should now be positioned correctly.

   The list of doors is now configured with a default layout. Edit the list layout to display more relevant information.

10. Click the application menu entry **Doors** to open the list.

11. Click the context menu and then **List Layout**.

12. Configure the slush buckets as shown below, then click **Save**.

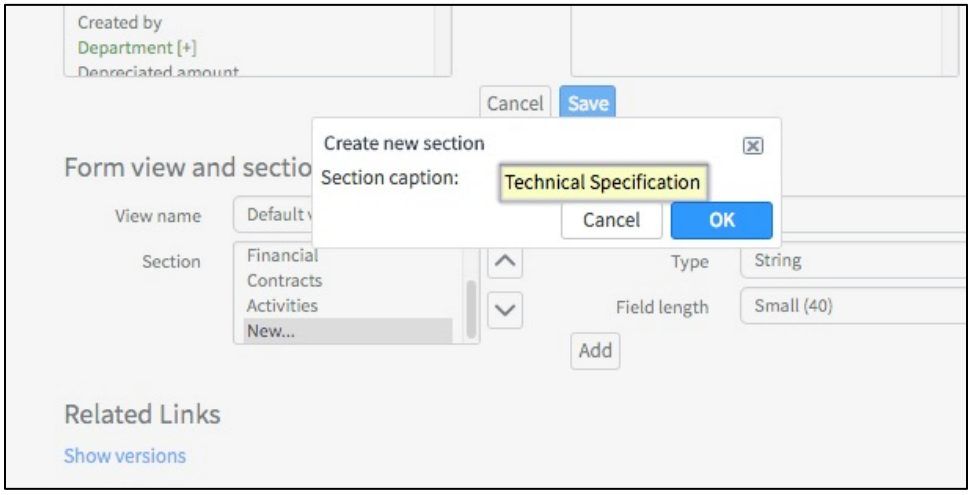


Configure Asset Form

Before you configure the asset form for doors, upload a few records into the list so you have a bit of data to use.

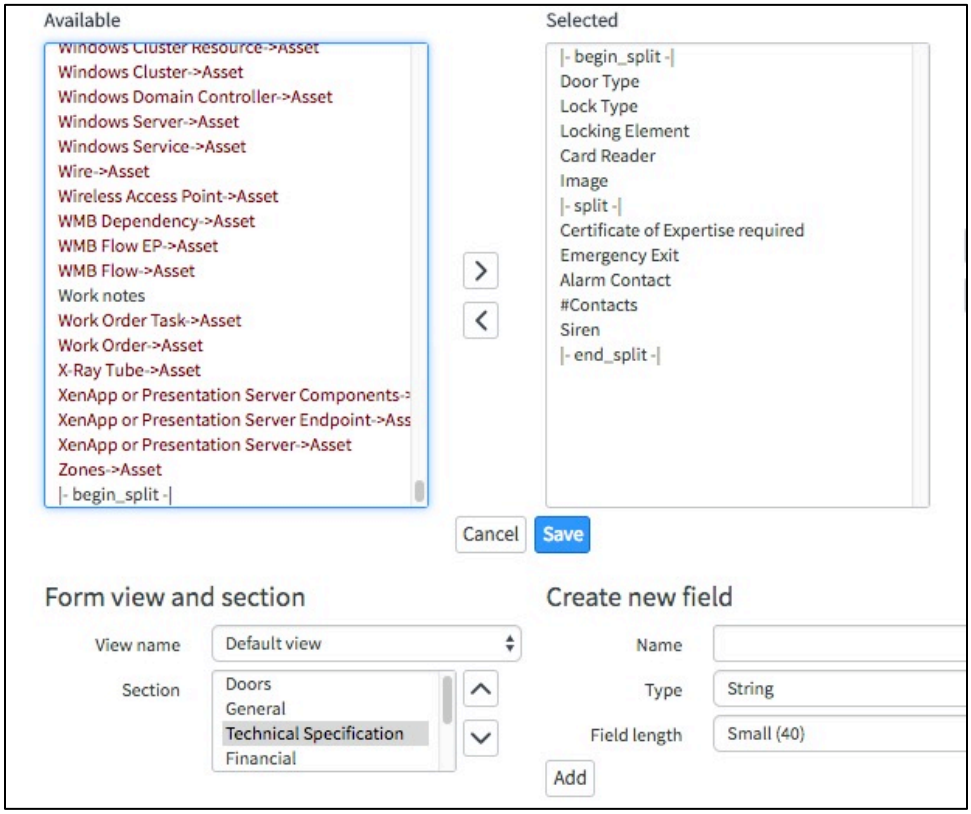
1. Download the **file u_alm_doors.xml** from the box folder for this lab to your local hard drive.
2. From the Doors list view click the context menu and then click **Import XML**.
3. Click **Select file**, choose the file you just downloaded, and then click **Upload**.
4. Open one of the uploaded records, click its context menu, and choose **Form Layout**.

5. Under Form view and section, scroll down in Section and click **New...**, then type **Technical Specification**. Click **OK**.

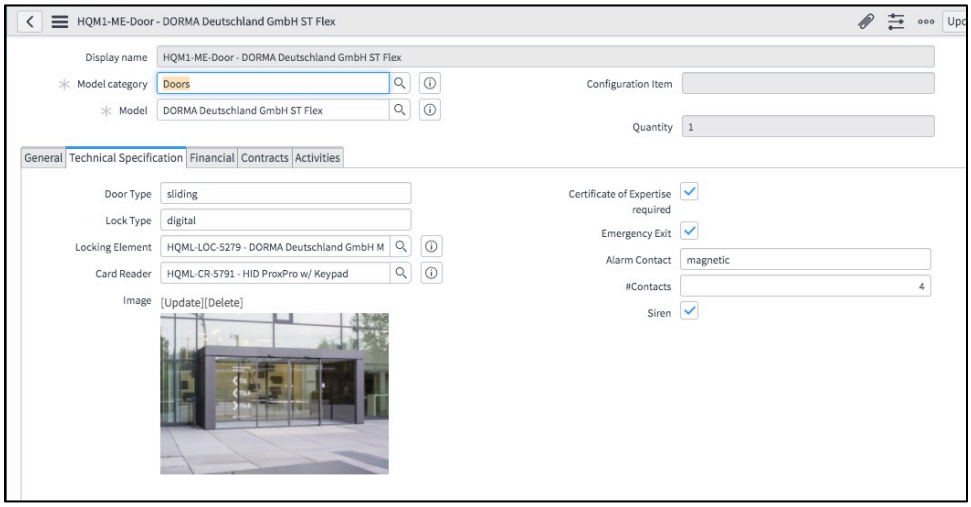


6. Move the new section up between **General** and **Financial**.

7. Make sure the new section is selected in **Section**, then configure the slush bucket as shown below:



8. Click **Save** to return to the form. It should now look like this:



Much better, but not quite perfect. The last thing to do on this form is to configure the Door Type, Lock Type, and Alarm Contact fields with choice lists. This is done by using the Dictionary of the respective fields.

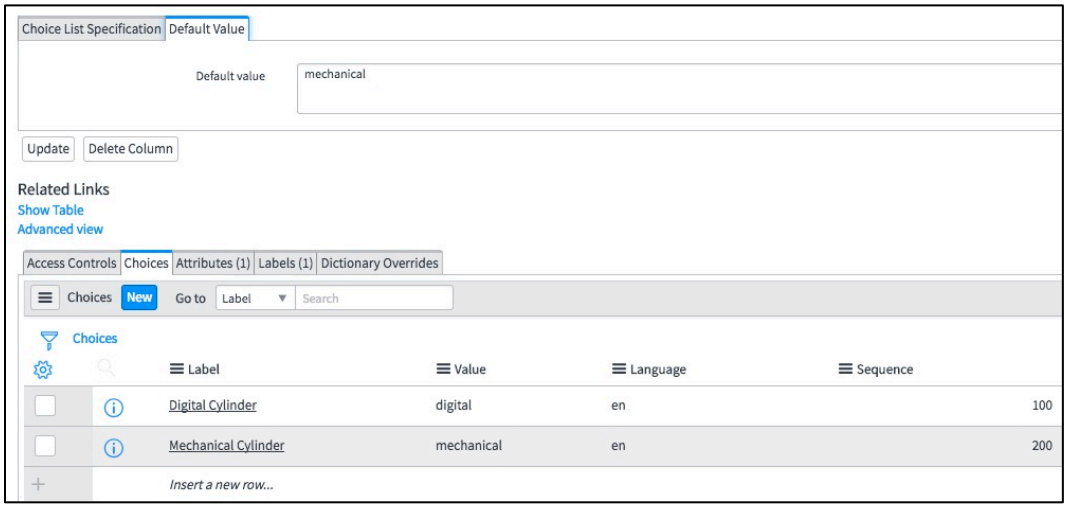
9. Right-click on the label **Door Type** to access its context menu. Click **Configure Dictionary**.
10. Set Choice to **Dropdown without –None --** …
11. Click the **Default Value** tab, enter **1wing** as the default value.
12. Click **Save** in the forms context menu.
13. Select the related list **Choices**. Enter the choices as shown below:



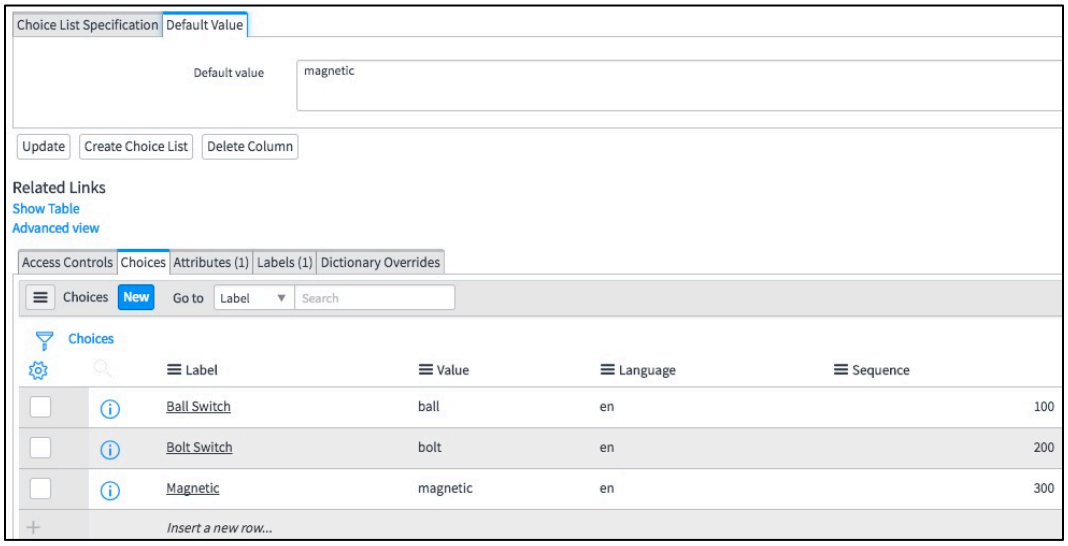
14. Click **Update** twice to return to the form Doors. The Door Type field is now configured with the selections just entered.

15. Repeat Steps 1-6 for the fields **Lock Type** and **Alarm Contact** with the choices shown below:

Lock Type



Alarm Contact



Facilities Workbench Steps— Parsing Configuration

Almost there! On the floorplan for the building you can see all doors, but in the standard configuration they are not clickable items, they are just part of the drawing. You need doors (and, in many cases, other assets like cameras or sirens) as individual objects on the map so that you can link assets, requests, and status information to them. This is easily done: by adding a parsing configuration for the object type.

1. Return to the application menu item **Tables & Columns**.

2. Click **Create Table** and build the table with the following attributes:

   Label: **Door**
   Name: **u_fm_door**
   Extends table: **Facility Space**
   Create module: **false**
   Auto-number: **true**
   Prefix: **DOOR**
   Create access controls: **false**
   Accessible from: **All application scopes**
   Can read/create/update/delete: **true**
   Allow access to this table via web services: **true**
   Allow configuration: **true**

3. Click **Submit**.

4. In the Facilities application menu, navigate to **Workbench Configuration -> Parsing Configuration**.

5. Click **New**.

6. Fill in the form as shown below:



7. Click **Submit**.

Facilities Workbench Steps— Map Set Parsing

The last step is to re-parse the map. This generates the doors as individual, interactive objects.

1. In the Facilities application menu, navigate to **Workbench Configuration -> Facilities Map Sets**.
2. Open the map set **ServiceNow – Santa Clara V1-1**.
3. Click the UI Action link, **Process Map Files**, then on the next page click **Preview**.
4. On the preview results page, observe that in the Facility Space Creation section 470 door objects are shown to be created once you progress with this step.
5. Click **Process** on the bottom of the page.
6. After the processing is complete, click the UI Action link, **View in Workbench** on the bottom of the page.
7. Click on **Building A**, then zoom in on the main entrance. Observe that the door symbol in the map is now a clickable object. Click on it, then click the **See Door Details** related link on the right.
8. Rename the object: Replace the generic name Door with **Building A Main Entrance**.
9. Either create a new door asset in the related list Assets on this form, or navigate to an existing record in **Facilities Assets -> Doors** and set its location field to **Building A Main Entrance**.

Lab Goal

Lab 4.0 Maintenance Plan

The planned maintenance application works with SM applications to help organizations manage regular, preventive maintenance of their assets.

The application uses maintenance plans to trigger the automatic creation of work orders or facilities requests. Work orders and facilities requests can be based on a specific time interval, such as after a specified number of months since the previous maintenance was performed, or they can be based on meters or usage.

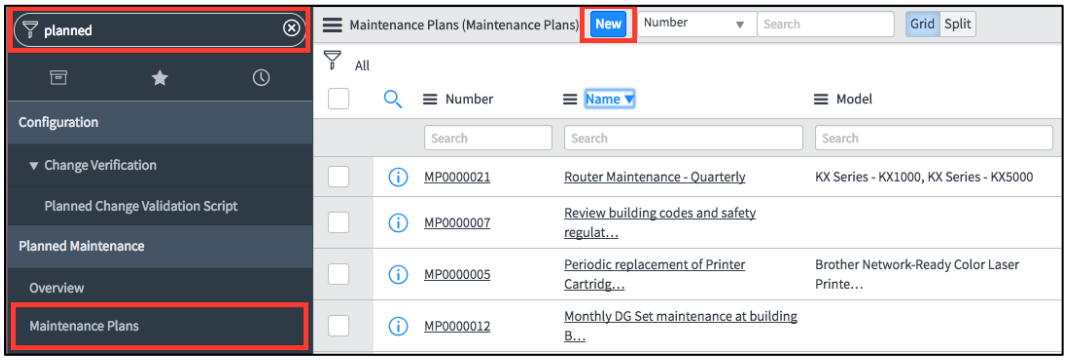
Create a Maintenance Plan

1. Select Planned Maintenance > Maintenance Plans from the left navigation bar.

   Note: Type **planned** in the Navigation Filter field above the Navigation Bar to limit the number of navigation menu options.

2. Click **Planned Maintenance > Maintenance Plans**.

3. At the top of the list view click **New**.

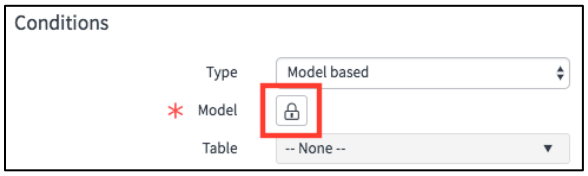


4. Enter the following information:

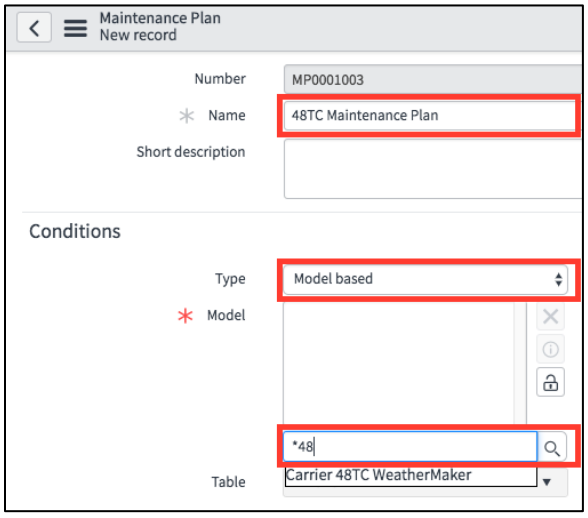
   Name: **48TC Maintenance Plan**
   Short description: **48TC Maintenance Plan**
   Type: Model based

   Choosing **Model based** for the type allows you to define a maintenance plan against a model. **General** is available as well, to allow customer to apply a maintenance plan to any object in the system, not just asset models.

5. Click the **lock** next to the Model field.

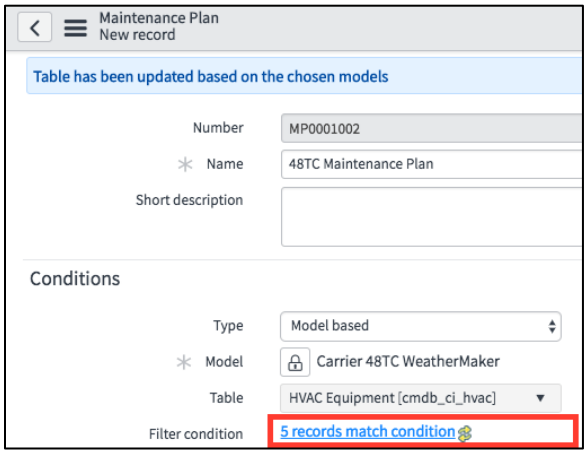


6. Type ***48** (star 48) in the model reference field and select the **Carrier 48TC WeatherMaker** model.



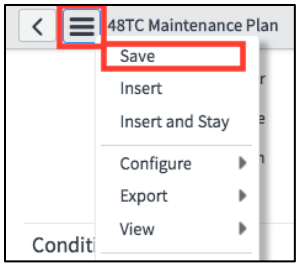
This action automatically defines the value in the **Table** field below, makes it read-only, and displays a message at the top of the form.

7. Click the **5 records match condition** hyperlink next to the Filter Conditions field.



8. A window pops up with the included records. Confirm that the 5 records are related to the **48TC WeatherMaker** HVAC unit.

9. Right-click in the header of the Maintenance Plan form or click on the **Additional actions** icon and select **Save**.



Two related lists appear at the bottom of the form: **Maintenance Schedules** and **Maintenance Plan Records**.

Lab Goal

After creating a maintenance plan, define specific criteria for determining when the plan should be executed.

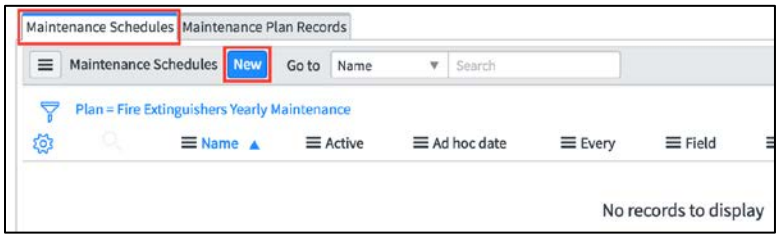
This lab explains how to create a maintenance schedule for the previously created maintenance plan.

Lab 4.1 Maintenance Schedule

Create a Maintenance Schedule

You are still on the **48TC Maintenance Plan** Maintenance Plan record you just created.

1. On the **Maintenance Schedules** related list, click **New**.



2. Enter the following information:

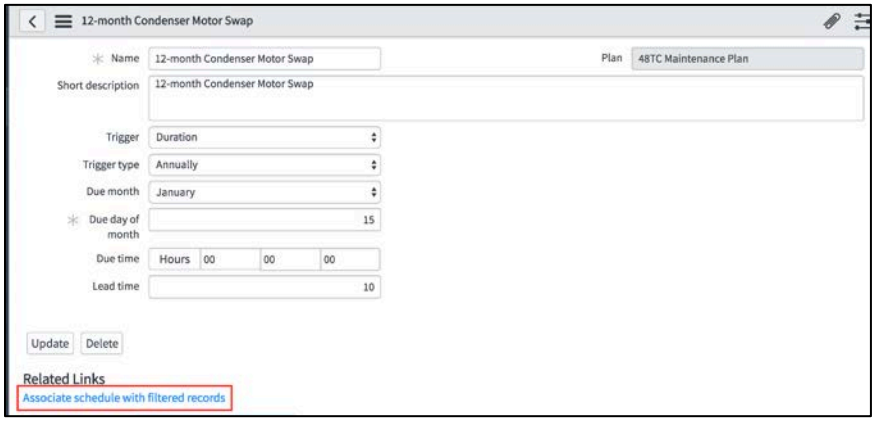
   Name: HVAC 12-month Condenser Motor Swap
   Short description: HVAC 12-month Condenser Motor Swap
   Trigger: Duration
   Trigger type: **Annually**
   Due month: **January**
   Due day of month: **15**
   Lead time: **10**

   Note: This means the system creates a preventive maintenance activity **10 days in advance** of the due date (in this example January 5th for a due date of January 15th).

   The other choice **Meter** for the trigger type allows customers to define a maintenance schedule around a cycle count vs. a time-based interval on maintenance.

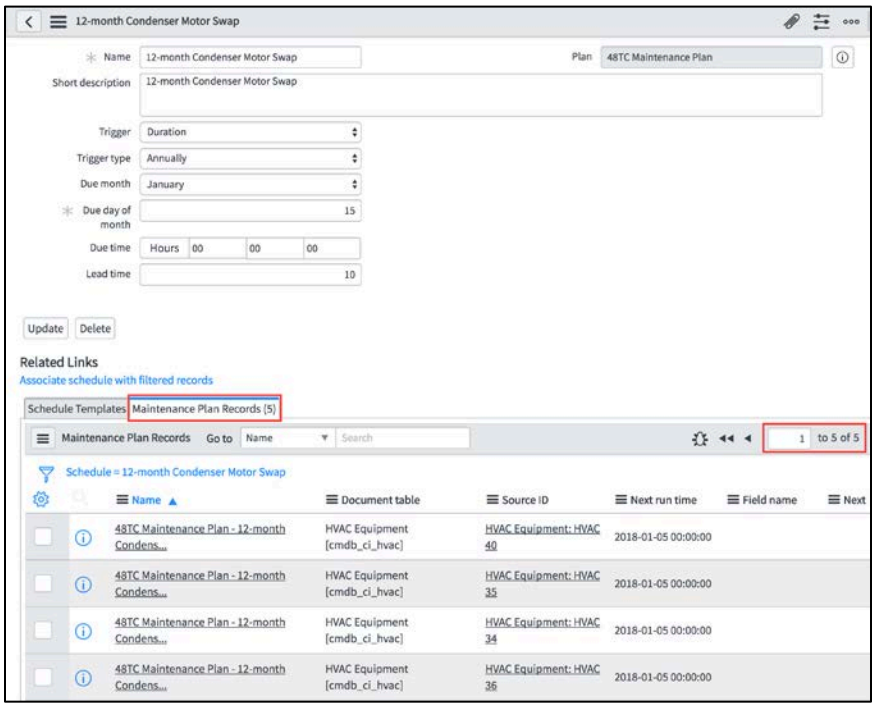
3. Right-click in the header of the Maintenance Schedule form or click on the **Additional actions** icon and select **Save**.

4. Under **Related Links**, click **Associate schedule to filtered records**. This action applies this maintenance schedule to the five HVAC equipment assets from the filtering step.



Lab Success Verification

1. The screen should look like the example below, with five records in the **Maintenance Plan Records** related list.



Note*:* For each of the five **Maintenance Plan records**, the value for the **Next run time** field is set to the **Maintenance Schedule Due date** minus the **Lead time**; in this example, January 5th for a due date of January 15th.

Lab Goal

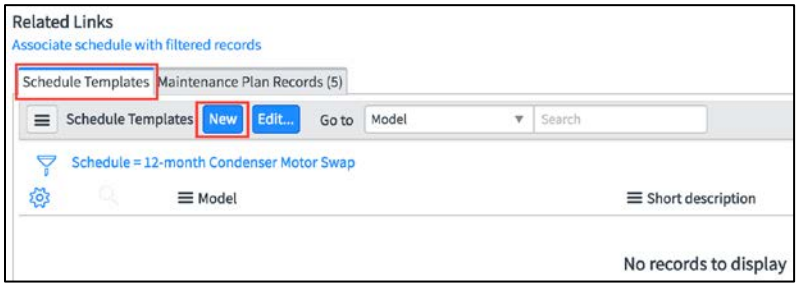
This lab explains how to use a Maintenance Schedule Template to auto generate assigned tasks and accomplish work for a Maintenance Schedule.

Lab 4.2 Maintenance Schedule Template

Create a Maintenance Schedule Template

You are still on the **12-months Condenser Motor Swap Maintenance Schedule** record you just created.

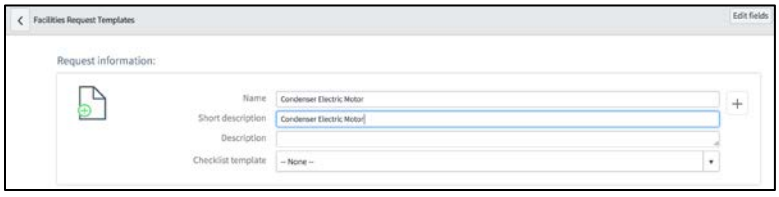
1. Click the **Schedule Templates** Related List and create a new Maintenance Schedule Template by clicking on **New**.



2. Choose **Facilities Request Model** from the list of Service Order Models.

3. Enter the following information in the **Request information** section:

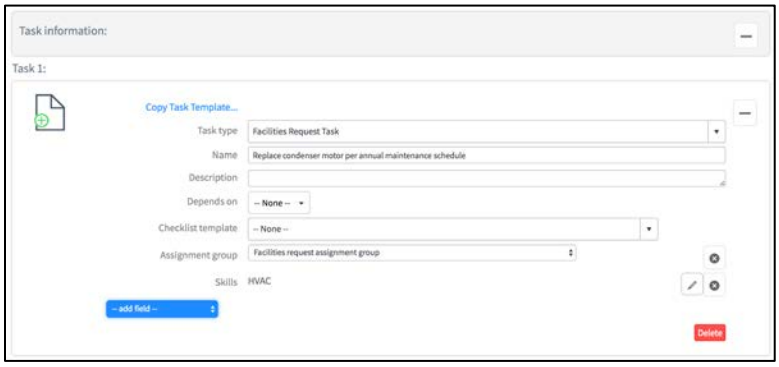
   Name: **Condenser Electric Motor**
   Short description: **Condenser Electric Motor**



4. Enter the following information in the **Task 1** section:

   Name: **Replace condenser motor per annual maintenance schedule**
   Assignment Group: **Facilities request assignment group**

5. In the **Skills** field, select **HVAC** to apply a skills requirement to the task. This action advises the Facilities request assignment group to assign this work to an HVAC specialist.



   Scroll to the top of the form and click **Submit**.

Lab Goal

Configuration of the Field Service application is similar to the Facilities application. This time, turn on auto-assignment and use Lab 6.2 to try it out.

Lab 5.0 Configuring the Field Services Application

1. Log in or Impersonate the **System Administrator**.
2. Navigate to Field Service -> Administration -> Properties. Review the available options. You may make changes as you wish, but be aware that the following labs are based on the default settings.
3. Navigate to **Field Service -> Administration -> Configuration**.

4. Make sure the following options are set:

   Process lifecycle: **task-driven** (subtasks are required)
   Qualification is required for new requests: **true**
   Agent must accept or reject the assigned task: **true**
   Track agent travel time: **true**
   Copy task work notes to request: **true**
   Assignment method for tasks: **using auto-assignment**
   Assign requests or tasks based on assignment group coverage areas: **true**
   Use dispatch queue: **true**
   Use agent or task scheduling: **true**
   Auto selection of agents will consider time zone for tasks: **true**
   Enable priority assignment: **true**
   Select priorities for priority assignment: **1 – Critical**
   Auto-selection of agents will consider location of agents: **true**
   Auto selection of agents for tasks requires them to have skills: **all**
   Part requirements are needed by agents: **true**
   Select Models:
      Cat 5 Cable (10ft)
      Fiber Optics
      Notebook Battery
      Router Cooling Fan
   Enable maps: **true**
   Signature Capture: **true**
   PDF Order Summary: **true**

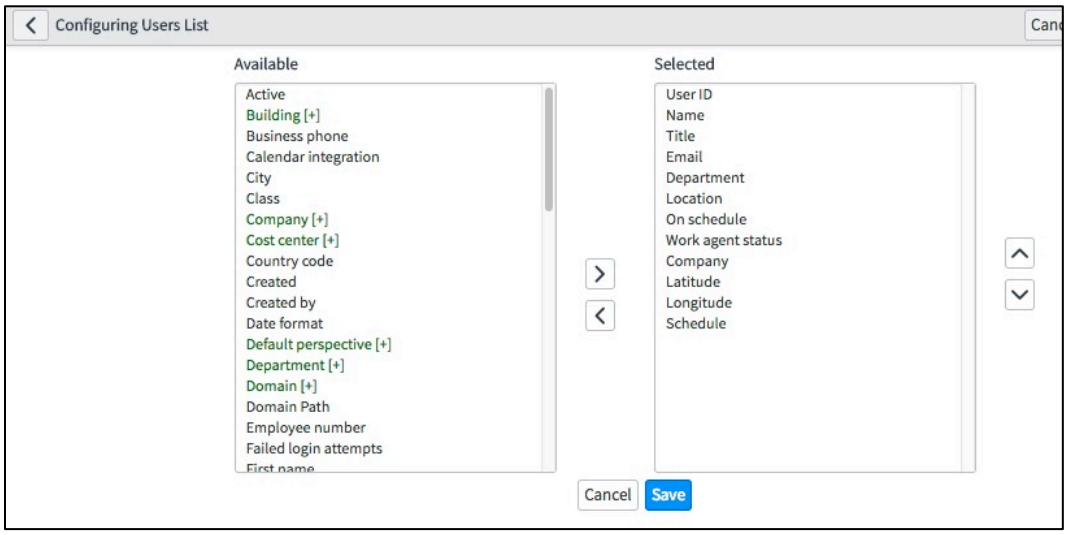
5. Click **Save** at the bottom of the page

Lab Goal

Lab 5.1 Configure Auto Assignment

In the previous lab, you turned on auto-assignment. Now make a few additional changes to the Field Service application menu to make it easier to track an agent's status and understand if and how auto-assignment is executed. You also need to set up the admin login to be able to see the appropriate qualification and dispatch queues.

1. Log in or Impersonate the **System Administrator**.
2. Navigate to the **Field Service** application, mouse over the application entry and click the **pencil** to access the **application menu configuration.**
3. Add an entry **Work Order Tasks assigned to me** between **Draft Work Orders** and **Awaiting Qualification** (**Hint:** the inactive entry **My Work Order Tasks** is not identical to the one you want to create!)
4. Navigate to **Field Service -> Dispatching -> My Agents.** Note that the list is empty – you do not have any agents available at this point to perform any work order tasks for you.
5. Click the list context menu, choose **List Layout,** then configure the slush bucket as show below:



6. Click **Save**.

7. Navigate to **Field Service -> Group Management**.
   The logged-on user must be a member of the qualification and/or dispatch group(s) configured to cover the location and work groups to see any of the work order tasks and agents. For the following lab, you use just a few of the groups available in the demo data, but you may add yourself to as many of them as you like to try out different scenarios and workloads.

8. Under **Group Management,** click **Qualification Groups,** then open the **West Qualifiers group.** Add the **admin user ID** as a member to this group. Take note of **the** related list Locations covered, you need this information in the next step!

9. Under **Group Management,** click on **Dispatch Groups.** Add the **admin user ID** to the groups that correspond to the locations covered by the qualification group **West Qualifiers**.

   Note: the dependency between dispatch groups and assignment groups is set through the Group Dependencies list, also to be found under Group Management.

10. Navigate back to **My Agents**. Now you should see a list of agents that your logged-on user covers as qualifier and dispatcher.

11. Navigate to **Field Service -> Dispatching -> My Dispatch Map**. Note that the map centers on **New York City**. The reason is the default location set in our demo data for the admin user.

12. Navigate to **User Administration -> Users.** Change the location for the admin user to **3260 Jay Street, Santa Clara, CA**.

13. Navigate back to **My Dispatch Map.** The map now centers on Santa Clara and you should be able to see the **symbol 7** close to San Francisco, indicating seven of your agents' locations.

Lab Goal

This lab guides through the creation of a field service work order from a facilities request. It also covers manual and automatic assignment.

Lab 5.2
Create a Field Service Work Order

1. Log in or Impersonate the **System Administrator**.
2. In the Facilities Workbench, navigate to the **ServiceNow Santa Clara campus, building A, ground floor**.
3. Zoom in on the main entrance door. Click on the door object, then click **Create Facilities Request** on the right
4. Add a detailed description: **Card reader not working after hours!**, then click **Submit**.
5. A facilities request is created and an indicator for it is shown on the workbench.
6. Open the facilities request – either directly from the workbench, or navigate to it through the **Facilities** application menu.
7. From the request form, open the context menu and click **Create Work Order**. A new work order is created and relevant information is copied over from the facilities request.
8. The new work order is in the state **Draft**. Review the information on the form, make any changes if required.

   Note: the qualification group is automatically populated based on the location of the request – DO NOT CHANGE!
9. Provide a reasonable date and time in the **Requested due by** field, then click **Ready for Qualification.**

A work order task has automatically been created as you set the process to **task-driven** in Lab 5.0. Qualification will now happen on the task(s) level!

6. Open the work order task from the related list. Its status is **Draft**, the dispatch group is pre-populated based on the location – DO NOT CHANGE!

7. Set the assignment group to **NorCal Technicians.**

8. Set the location to **ServiceNow – Santa Clara**.

   Note: The door referenced as a location in the facilities request does not have a valid physical address; therefore, you want a more meaningful location entry for the field service task.

9. On the **Planned** tab, provide reasonable scheduling information.

   Remember: The date and time specified as Requested due by on the work order. The window **start** and **scheduled start** must be before the **requested due date/time**! **Estimated end** also must be before **Requested due by**; it is calculated using **Scheduled start**, **Estimated travel duration** and **Estimated work duration**.

10. Click **Qualified**.

11. Has auto-dispatch assigned an agent? Why (not)?

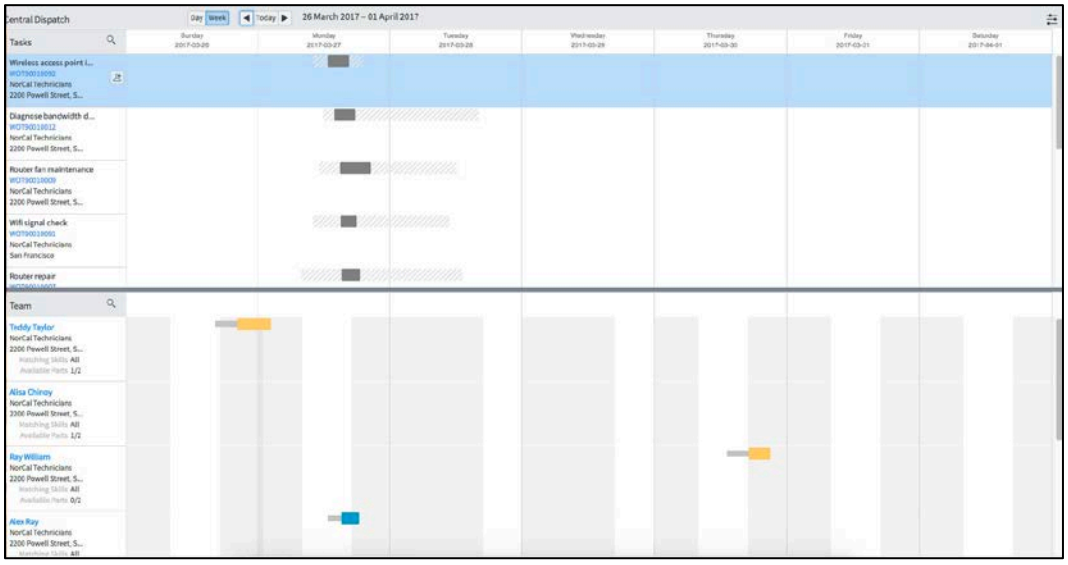
    Note: We will explain later in the lab how the auto-dispatch algorithm works and how to get it working in your demo instance!

Lab Goal

In this lab, you use manual assignment through the Central Dispatch to assign work order tasks to available agents.

Lab 5.3 Central Dispatch

1. Log in or Impersonate the **System Administrator**.
2. Navigate to **Field Service > Dispatching > My Dispatch Queue.** You should see several work order tasks in Pending Dispatch state.
   Observe the Scheduled start date – most of them should be set to March 30th or before
3. Navigate to **Field Service > Dispatching > Central Dispatch.** The page opens in a new browser tab or window.
4. Use the **date navigator** (arrows) on top of the page to scroll back to the week starting March 26th. Your screen should now look like the example:



5. Use the **settings** menu on the top right to access the options menu:



6. In the **Task Display Fields** section on the Tasks tab, set **Assignment Group** to **true**.

7. On the **Team** tab, set **Location**, **Matching Skills**, and **Available Parts** to **true**. Click the **menu** icon again to close the menu.

   The top half of the page displays all tasks pending dispatch. Click on one of the blue task links to open the task form as an overlay. The striped bars on the timeline show the time window set in the task, the solid gray shows the estimated work time.

   Once you select a task, the bottom half of the page shows a list of potentially available agents. It also shows their schedule and assigned tasks on the timeline.

8. Drag one of the tasks (the solid gray area) from the timeline to one of the agents. Note that you may change the estimated work start by moving the task across the agent timeline before dropping it.

9. The task form opens. Available parts and skills set for the task are automatically reevaluated for the agent you just chose. Note that the default configuration allows you to manually assign a task to any agent, even with missing parts or skills.



10. Click **Update** to assign the task. Check the agent timeline on the **Central Dispatch** page: it should now show the task and any travel time entered for it.

Lab Goal

Lab 5.3 Auto-Assignment

In this lab, you will get auto-assignment to work (finally!). There are four aspects to keep in mind:

- **Location**: Every task needs a valid location. That includes Latitude/Longitude information in the respective fields for that location! ServiceNow enters that information once you provide a valid address. If it is missing, auto-assignment fails!
- **Skills**: Depending on how you configure auto-assignment, required skills must be assigned to an agent before auto-assignment can choose them for a task.
- **Parts**: As with skills, depending on your configuration an agent must have access to required parts. This would be tracked through the agent stockroom.
- **Schedule**: Most importantly, agents need a valid schedule. Auto-assignment uses the schedule to determine an agent's availability. Without a valid schedule, auto-assignment fails!

In this lab, you do not have the time to look at skills and parts, so focus on location and schedule.

1. Log in or Impersonate the **System Administrator**.

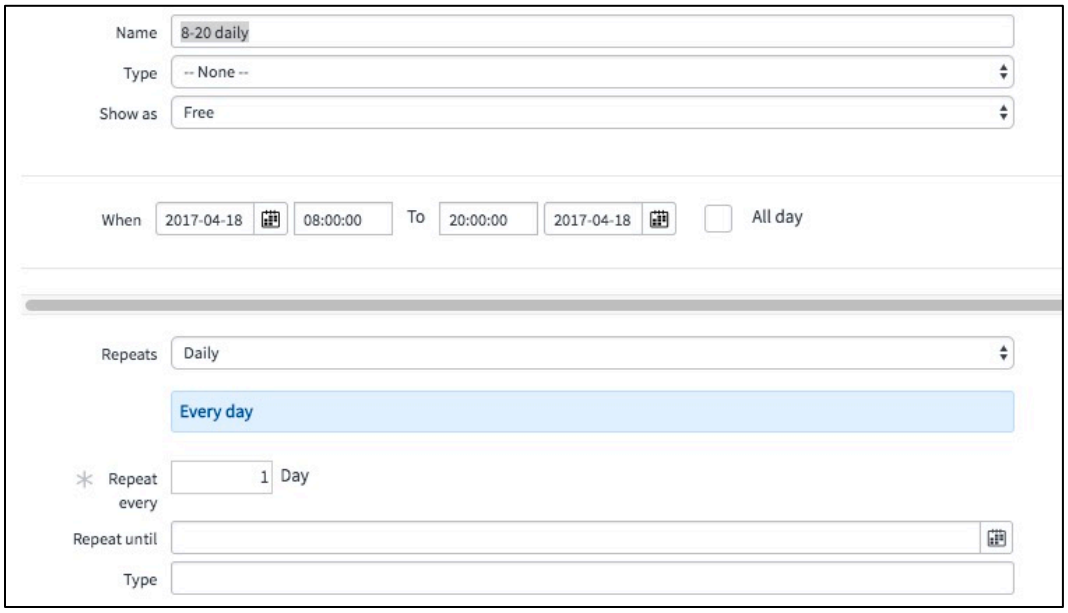
2. Navigate to the **My Agents** list. In the default demo data, none of your agents has a schedule assigned, therefore auto-assignment always fails.

3. Assign the schedule **8-20 all days** to all your agents. Note: the quickest way to do this is from the list view: highlight the Schedule cell for all agents, double-click, then enter and save the schedule.

4. From the **My Agents** list, click the schedule entry for the first agent, **Alex Ray**. This opens the schedule definition. Note that the Schedule Entries related list is empty – you need to fix this first!

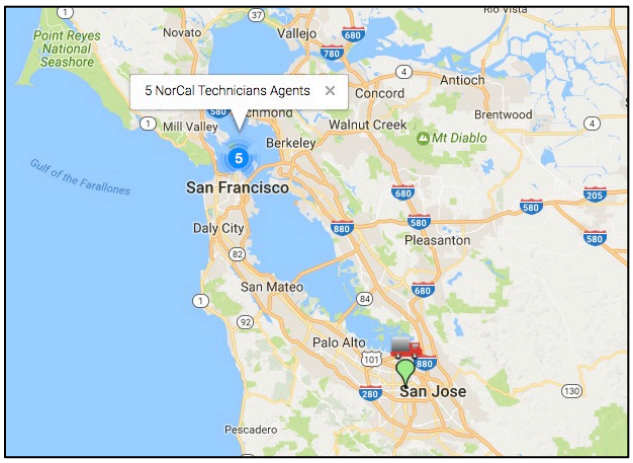
5. On the **Schedule Entries** related list, click **New**.

6. Enter the information as shown below, then click **Save**.



7. Navigate to **My Dispatch Map**. Check that you can see multiple agents in the San Francisco area. Clicking on the **xx NorCal Technicians Agents** link opens a list of these agents as an overlay.

   Note: The map should also show a marker for the work order task you created for that door in Lab 5.0, near San Jose:



8. Navigate to the **My Dispatch Queue** list, find and open the work order task you created in Lab 5.0. Does auto-assignment assign an agent? Why (not)?

Lab Goal

Thank you for attending this lab. We hope that you found it informative!

Lab Complete