Lab Guide

Increase Field Productivity with Field Service Management

Mark Crumpacker & Steve Werner

Default Login / Password:

admin / LabPass

itil / LabPass

employee / LabPass

Lab Sponsored by Amazon Web Services



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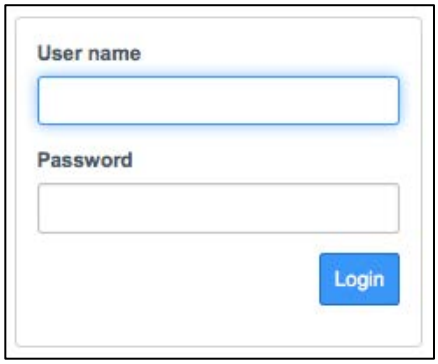
Lab Goal

This first lab includes all steps required to prepare to complete this lab.

Lab 1
Accessing your Instance

Log on to Your Lab Instance

1. Your instance URL is on the cover page.
2. Log in using the admin credentials provided on the cover.



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Lab Goal

This first lab includes all steps required to prepare to complete this lab.

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

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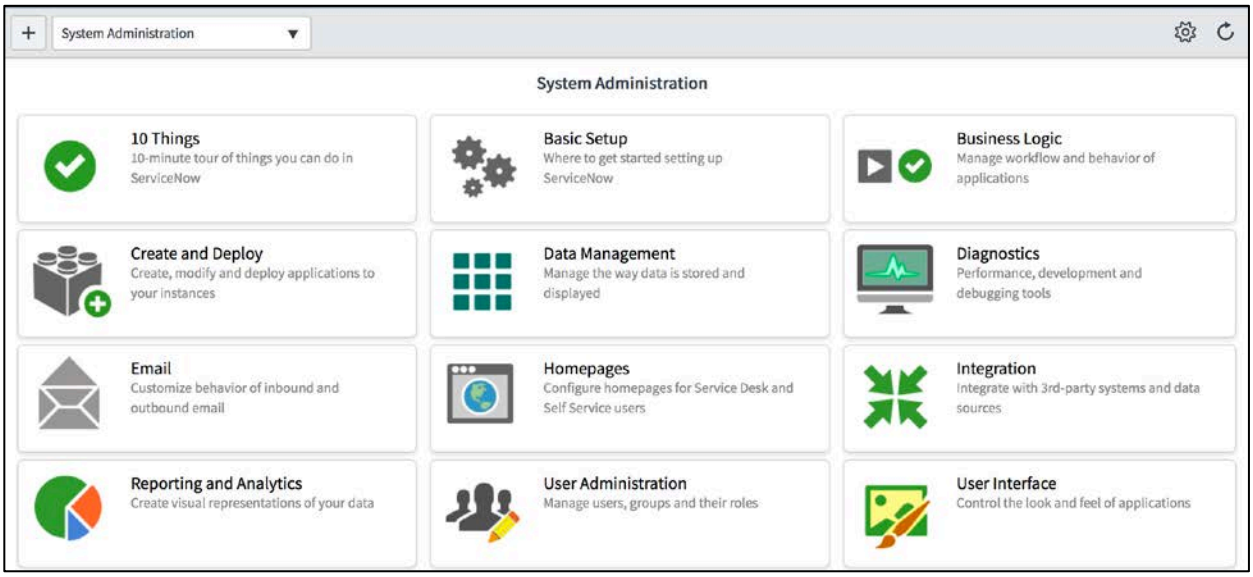
Lab Goal

During this lab, we will cover the aspects of Asset Management in relation to Field Services. The objective of this section is purely educational. No configuration will be made.

Lab 2
Asset Management

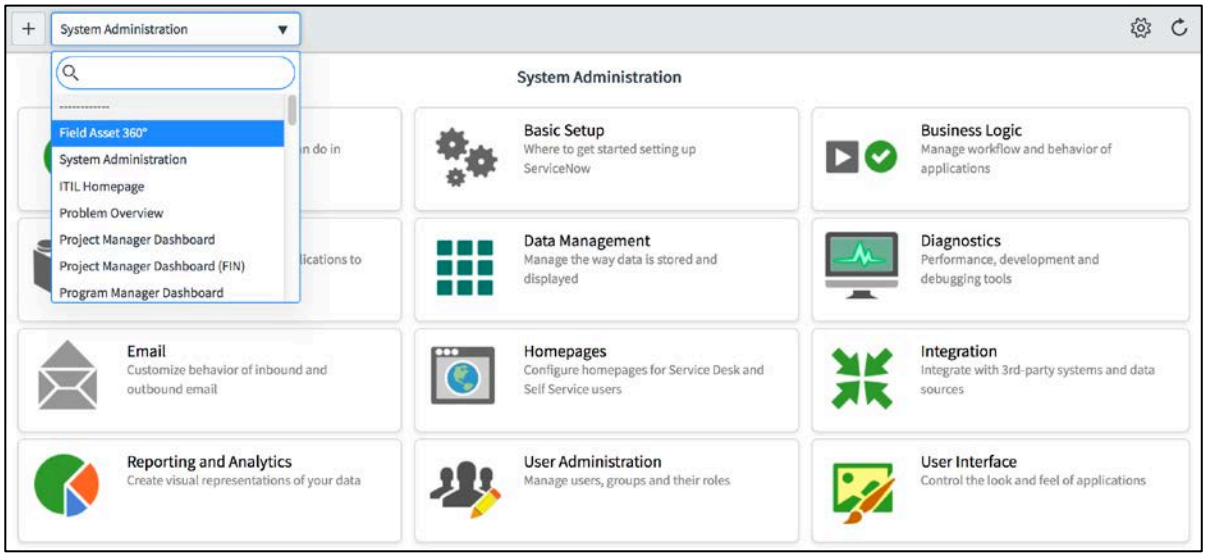
Asset Dashboard

1. Once you log in you should land on the home page below:

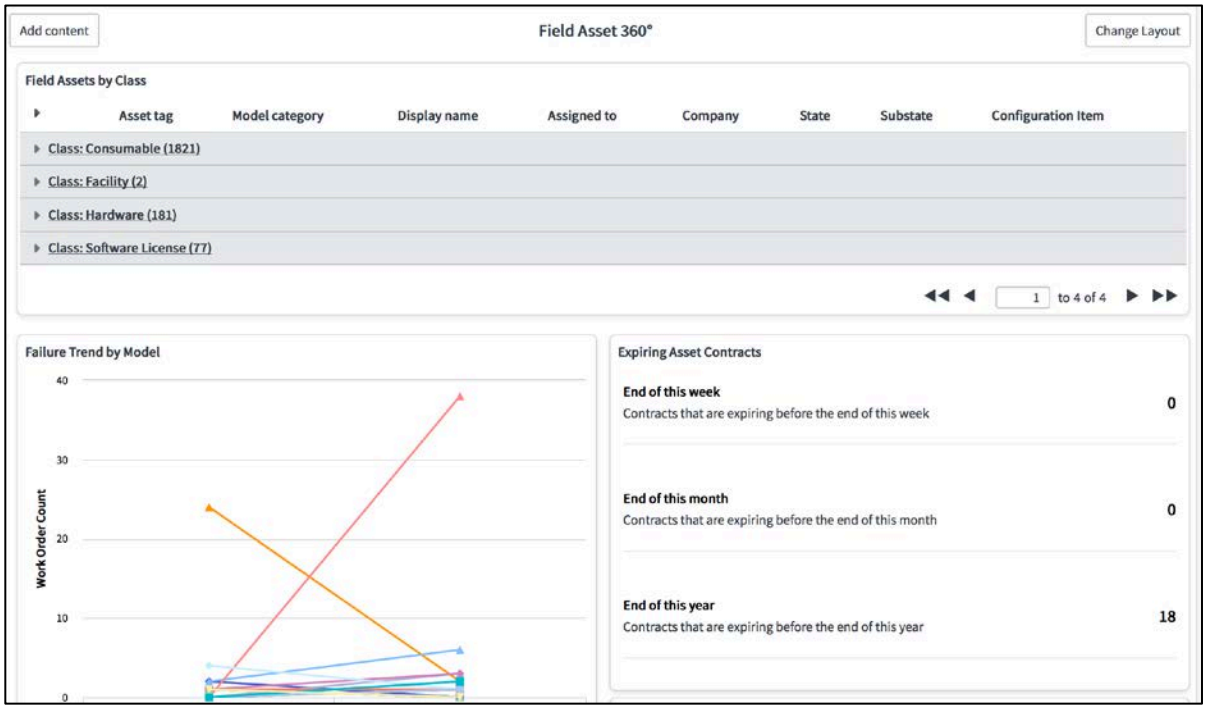


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2. Select **Field Asset 360°** from the dropdown.

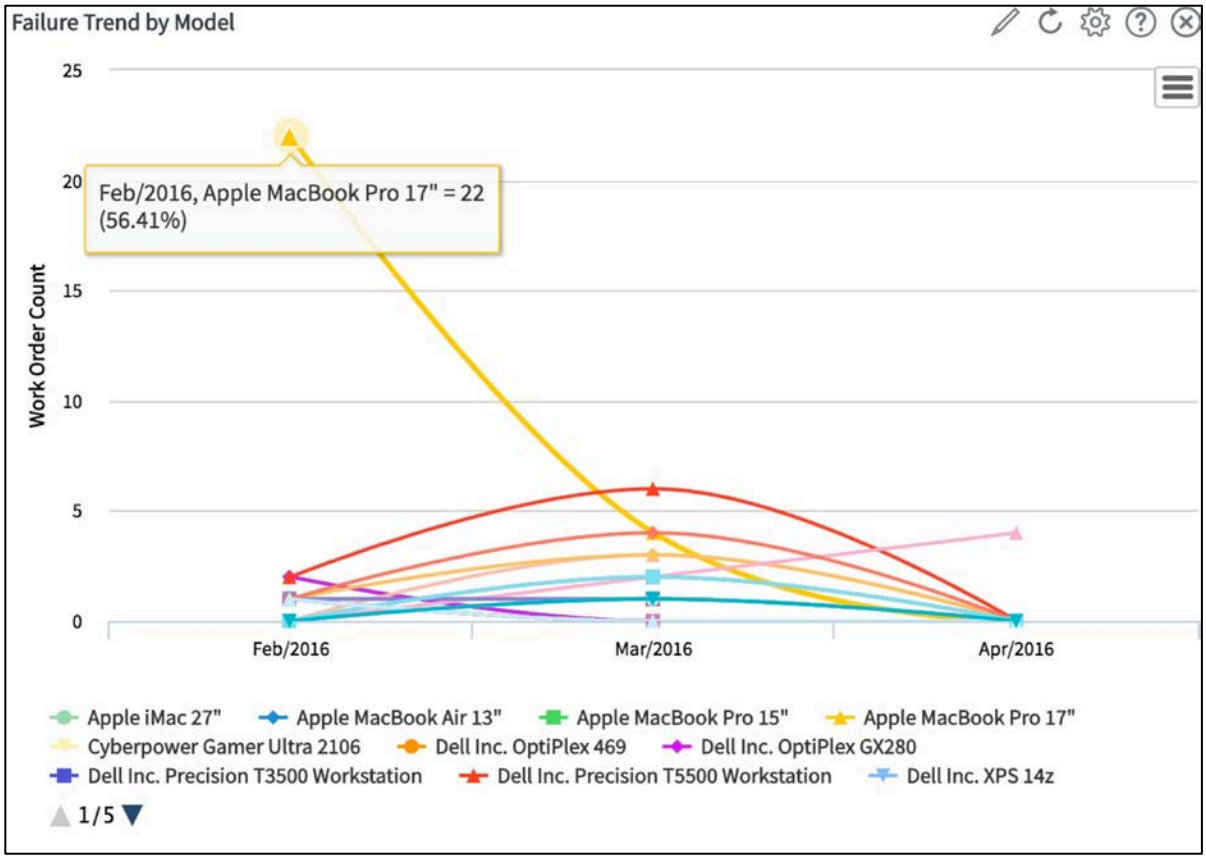


3. Navigate throughout the dashboard. You'll see various representations of asset data - presumably, the assets that are being managed in the field. For example, "Field Assets by Class" organizes all the provider's assets (or products).

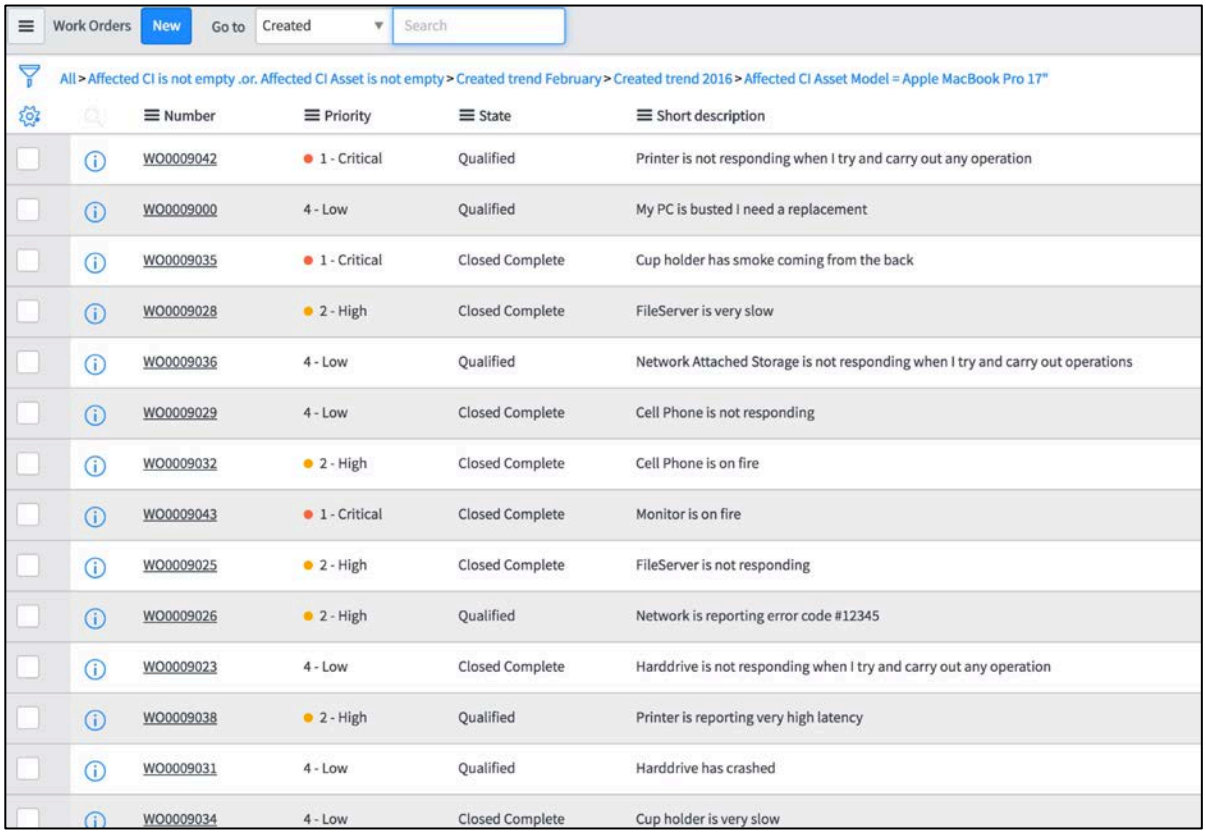


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4. Another important example, “Failure Trend by Model,” will help an asset manager understand which products tend to fail and when. Drill into a peak on a line to view all the current work orders that are in flight on that product model.



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Work Orders | New | Go to | Created | Search

All > Affected CI is not empty .or. Affected CI Asset is not empty > Created trend February > Created trend 2016 > Affected CI Asset Model = Apple MacBook Pro 17"

Number	Priority	State	Short description
WO0009042	1 - Critical	Qualified	Printer is not responding when I try and carry out any operation
WO0009000	4 - Low	Qualified	My PC is busted I need a replacement
WO0009035	1 - Critical	Closed Complete	Cup holder has smoke coming from the back
WO0009028	2 - High	Closed Complete	FileServer is very slow
WO0009036	4 - Low	Qualified	Network Attached Storage is not responding when I try and carry out operations
WO0009029	4 - Low	Closed Complete	Cell Phone is not responding
WO0009032	2 - High	Closed Complete	Cell Phone is on fire
WO0009043	1 - Critical	Closed Complete	Monitor is on fire
WO0009025	2 - High	Closed Complete	FileServer is not responding
WO0009026	2 - High	Qualified	Network is reporting error code #12345
WO0009023	4 - Low	Closed Complete	Harddrive is not responding when I try and carry out any operation
WO0009038	2 - High	Qualified	Printer is reporting very high latency
WO0009031	4 - Low	Qualified	Harddrive has crashed
WO0009034	4 - Low	Closed Complete	Cup holder is very slow

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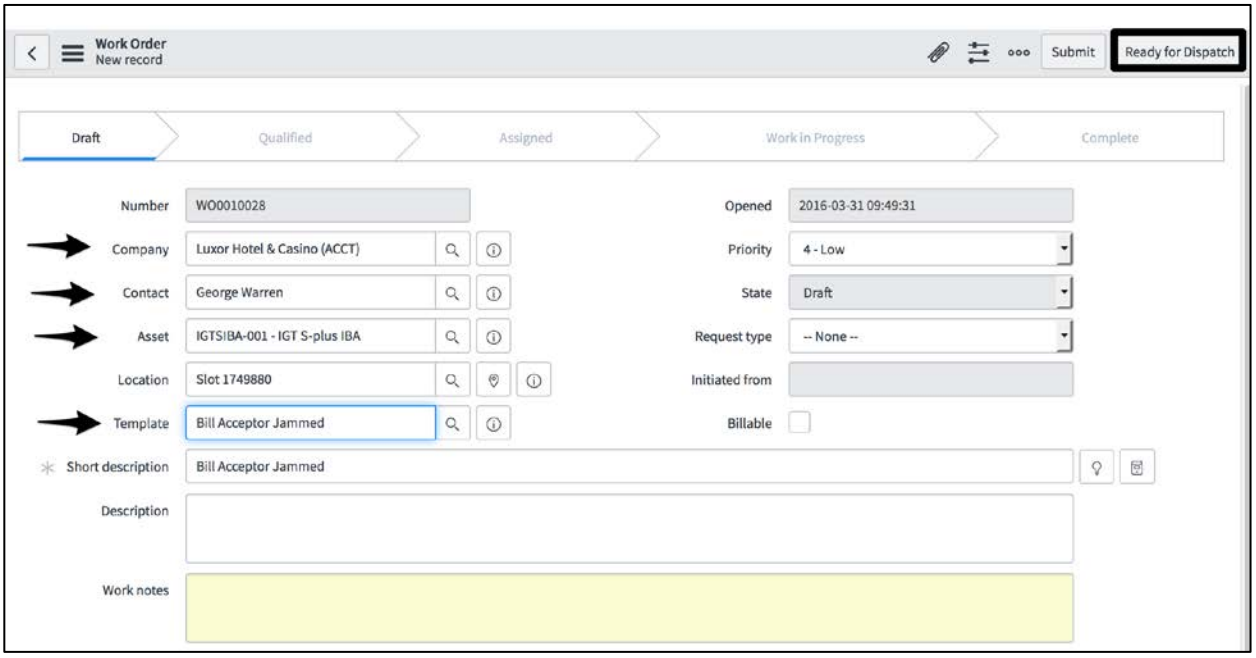
Lab Goal

During this lab, we will cover aspects of the initial creation of Field Service work orders. Keep in mind that while work orders can be initiated in a number of ways (e.g., through preventative maintenance, self-service, etc.), we will be focusing on manual entry.

Lab 3
Break/Fix

Creating a Work Order

1. Confirm that you are logged in as **Administrator**.
2. Select **Field Service > Work Order > Create New**.



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3. Populate the following fields:

   - Company – **Luxor Hotel and Casino (ACCT)**
   - Contact – **George Warren**
   - Asset – **IGTSIBA-001 – IGT S-plus IBA**
   - Template – **Bill Acceptor Jammed**

4. Click **Ready for Dispatch** (do NOT click 'Submit')

Note '**Ready for Dispatch**' triggers the template to apply the following:

- Short description
- 1 Work Order Task (WOT) - in the related list
- WOT assignment group
- WOT skills requirement
- WOT Checklist

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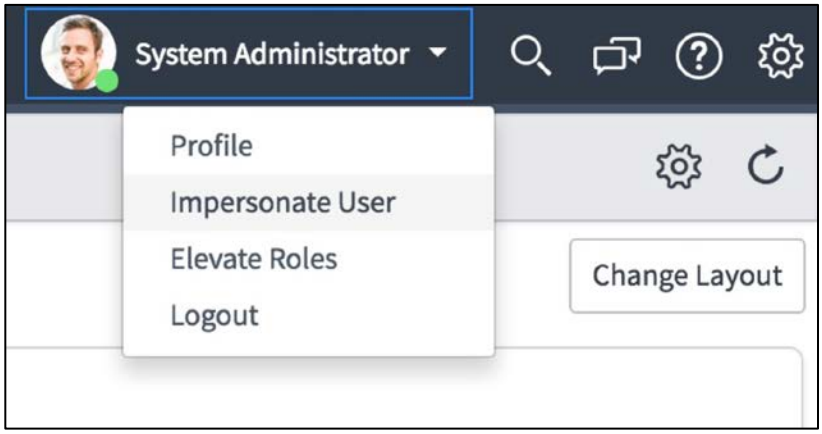
Lab Goal

During this lab, we will take a persona-driven approach (as dispatcher) to cover the aspects of the Field Service Dashboard, Location Tracking, Work Order Management, Part Sourcing, and Agent Sourcing and Dispatch.

Lab 4
Dispatch

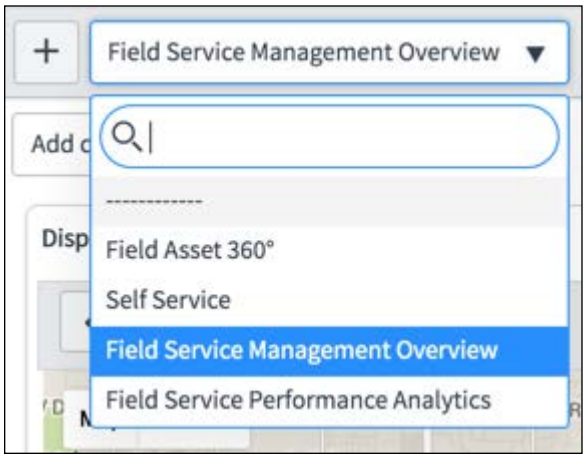
Field Service Dashboard

1. Impersonate user **LV Dispatcher**.

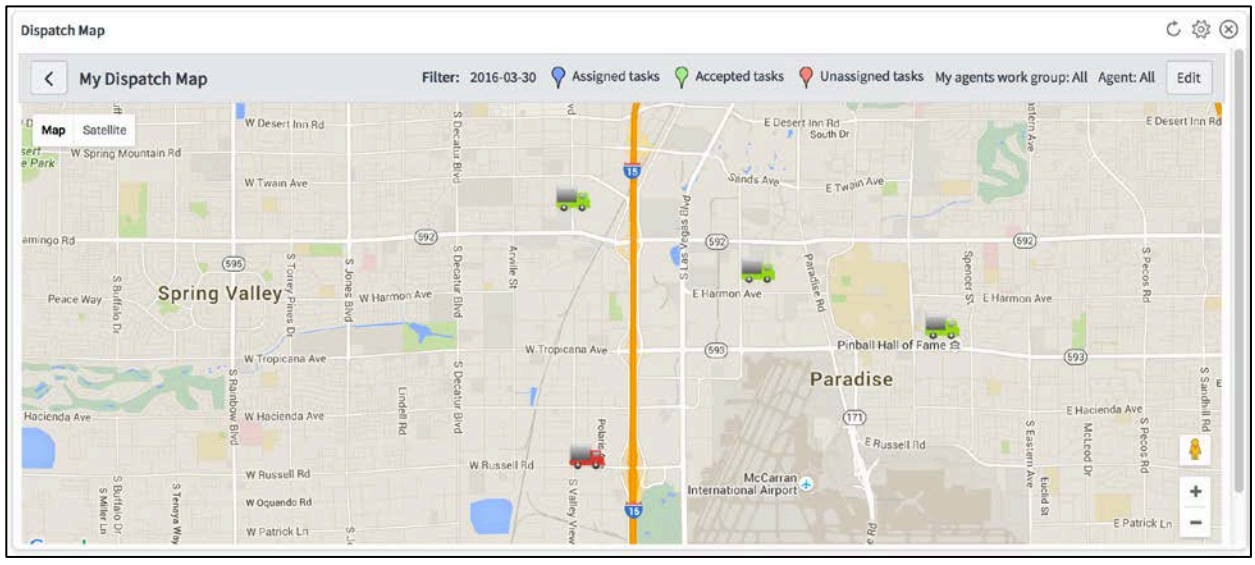


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2. You should land on the **Field Service Management Overview** dashboard; if not, select it from the dropdown as seen below.

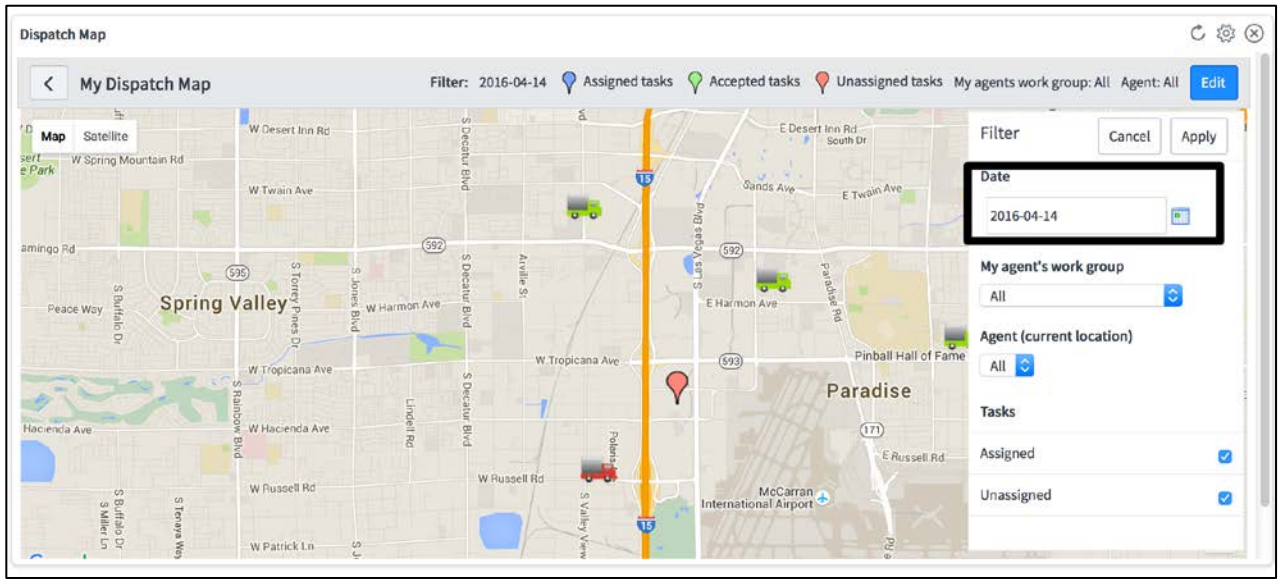


3. You will see the dispatch map in the top section of the screen.



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4. Select **Edit** as seen in the screenshot below and change the date to today's date. This will allow the Work Order Task to show up on the map. This is also where you would change the filters to determine what is shown on the map.

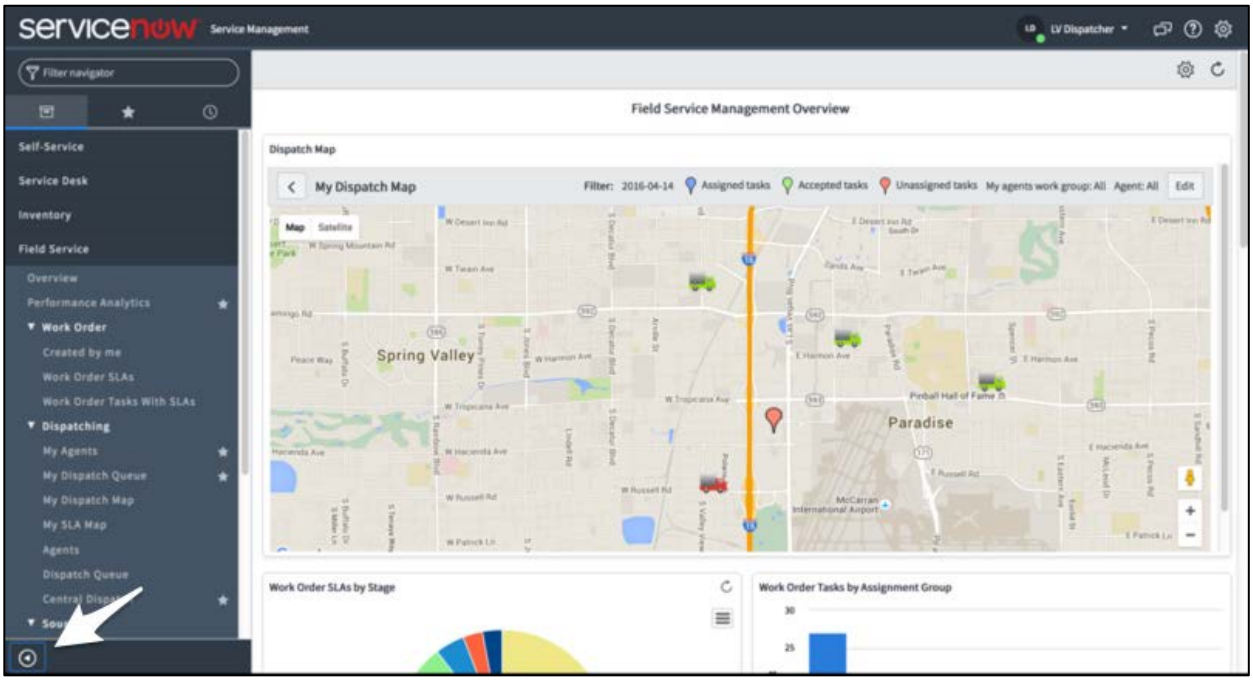


Note the locations of the trucks and the newly created task. You can drill into the task from this screen if you like. The color of these trucks denotes their status and availability. Click on the red truck to see that agent's status for yourself.

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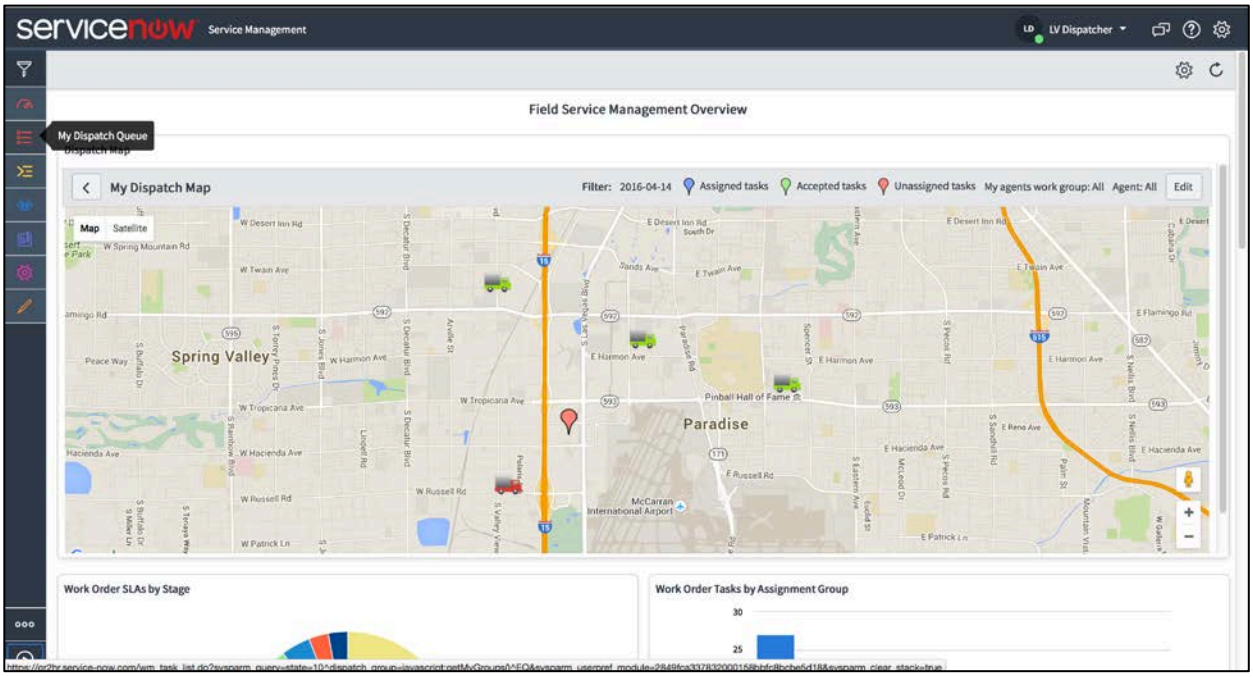
Dispatch Queue

1. Minimize the Left Navigation Panel by selecting the arrow in the bottom-left of the screen as seen below.

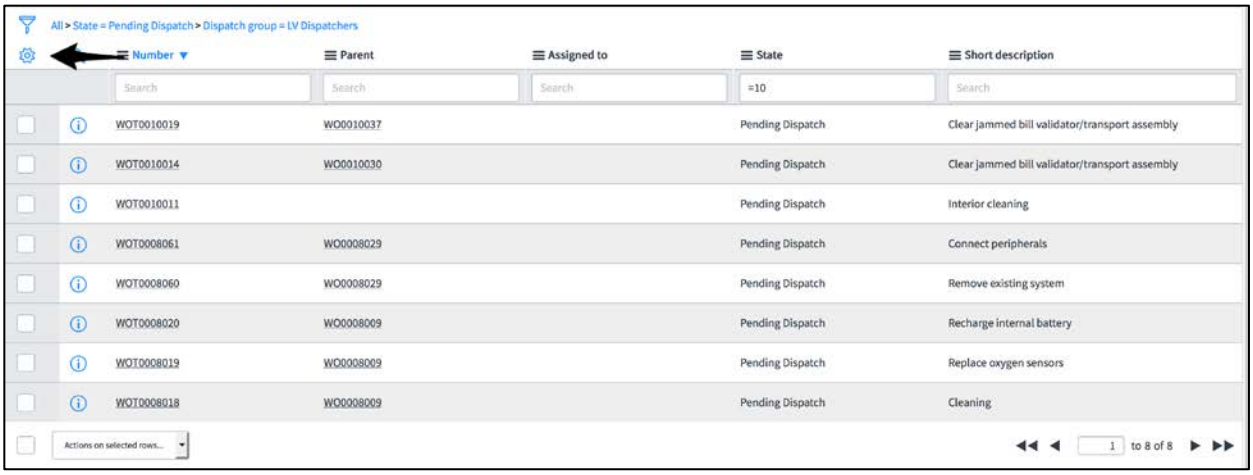


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2. Select the **My Dispatch Queue** bookmark.

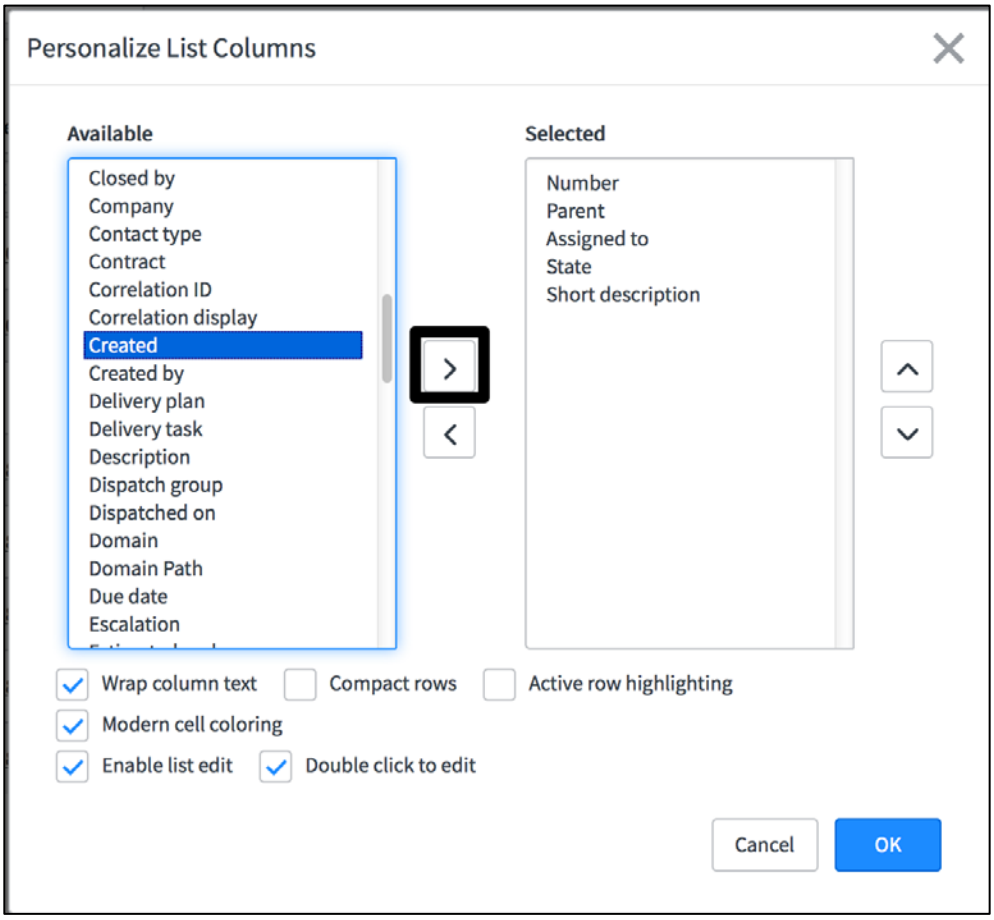


3. On the **Dispatch Queue**, select the gear noted in the screenshot below.



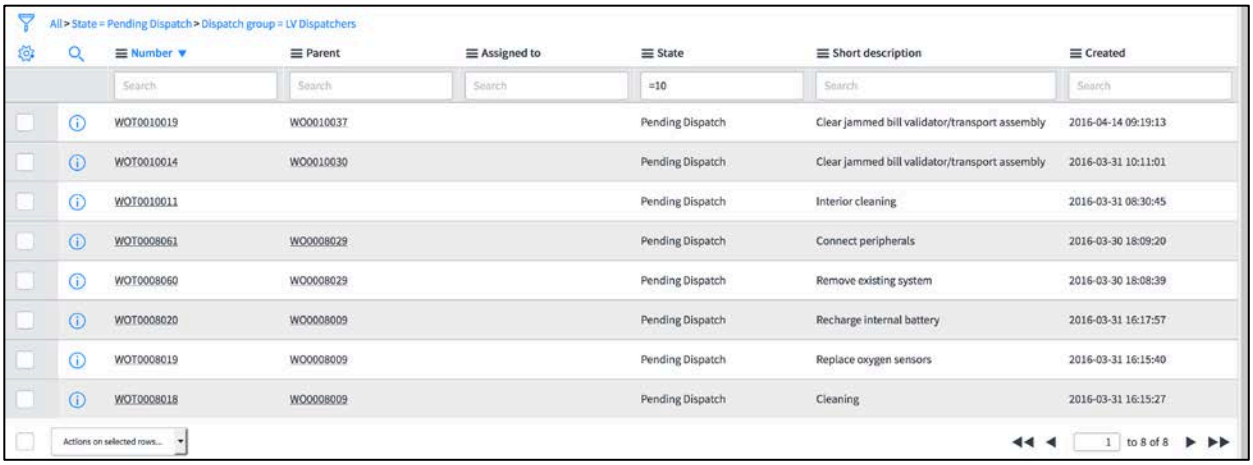
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4. Add **Created** to the list on the right and then select **OK**.

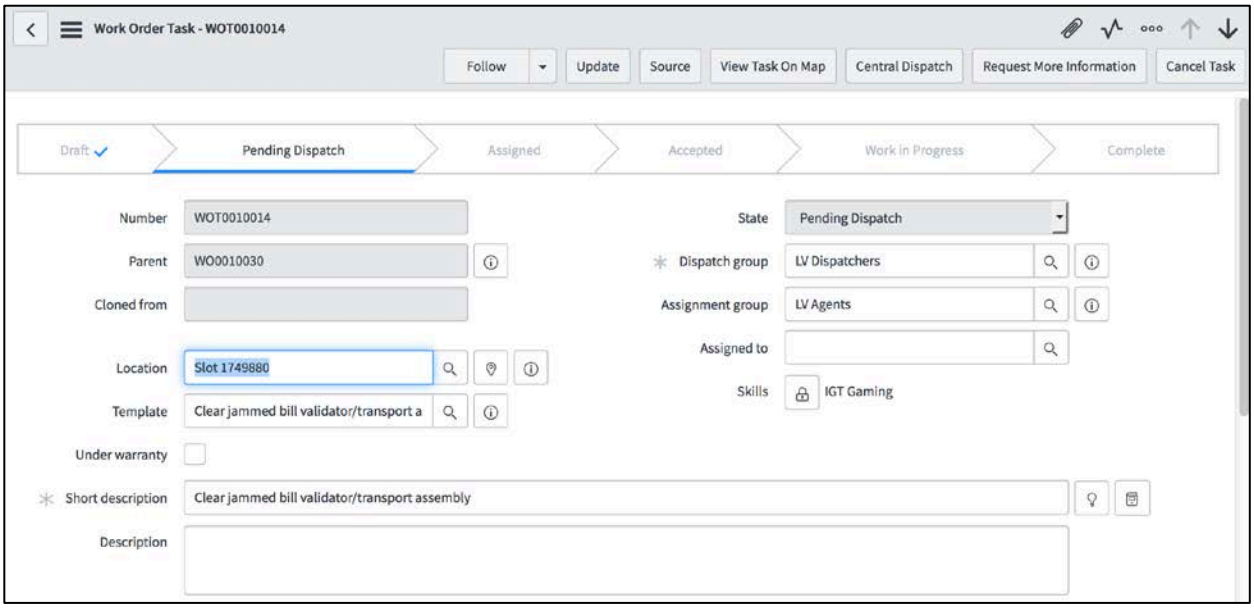


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5. Your newly created Work Order Task should be at the top of the list. If not, click on **Created** column to sort it accordingly.

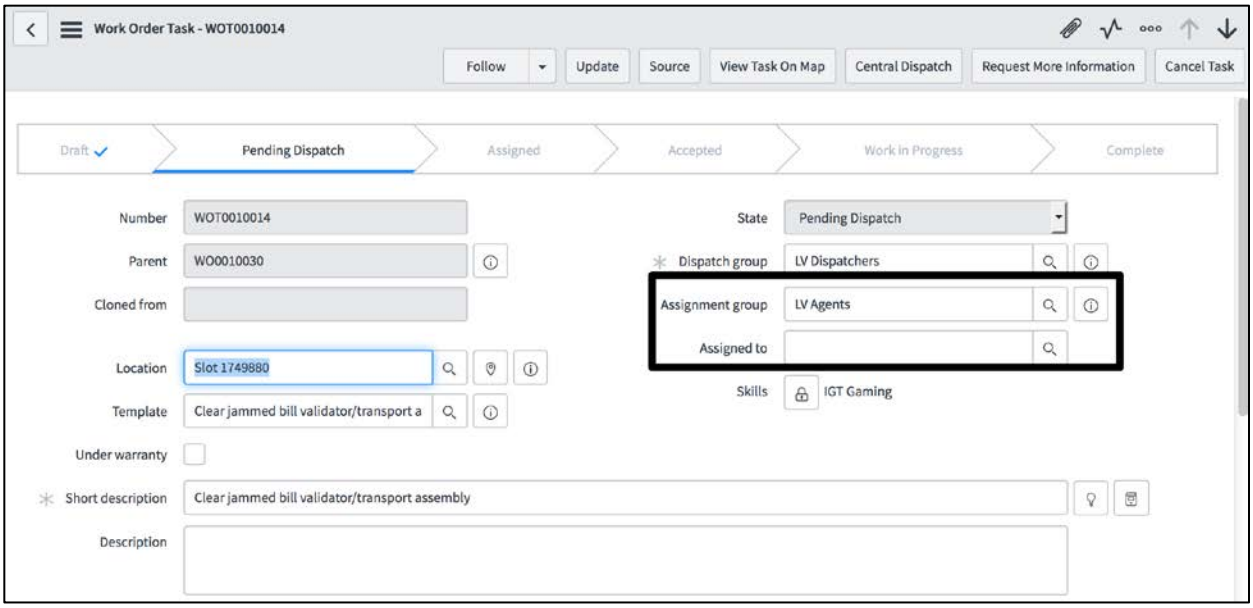


6. Select the **Work Order Task** to open it. Note status is 'Pending Dispatch'.

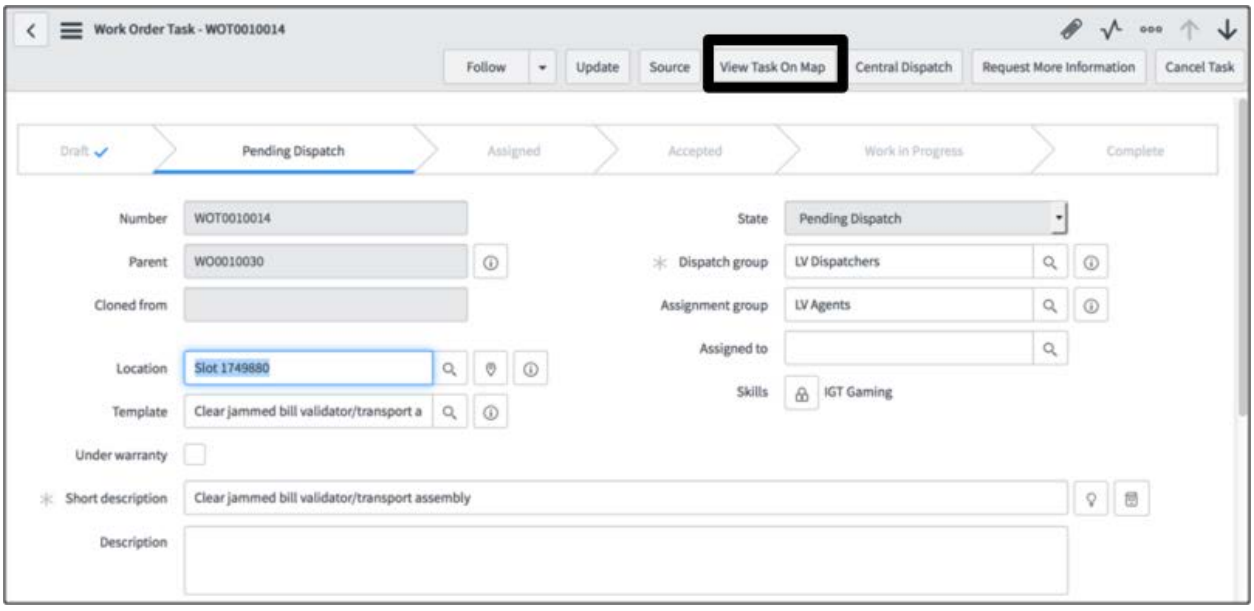


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7. You can manually assign the Work Order to an agent as seen below. Don't make the assignment here as we are going to use the new Central Dispatch to do so.

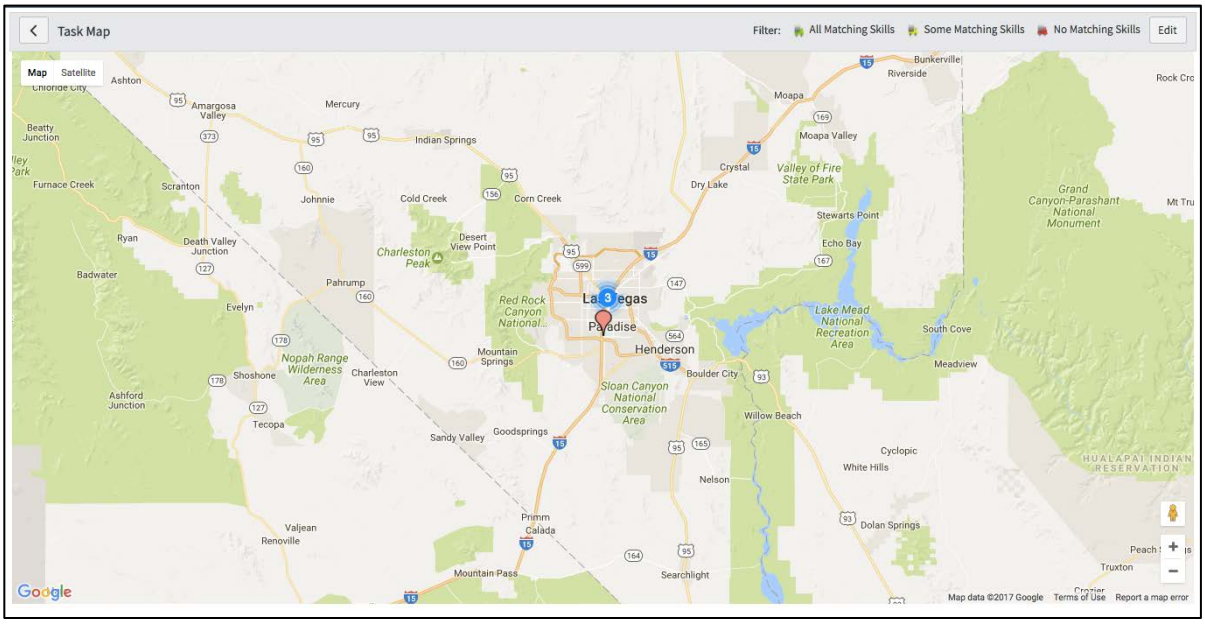


8. You can also **View the Task** on the Map (click button at top); give it a try now.



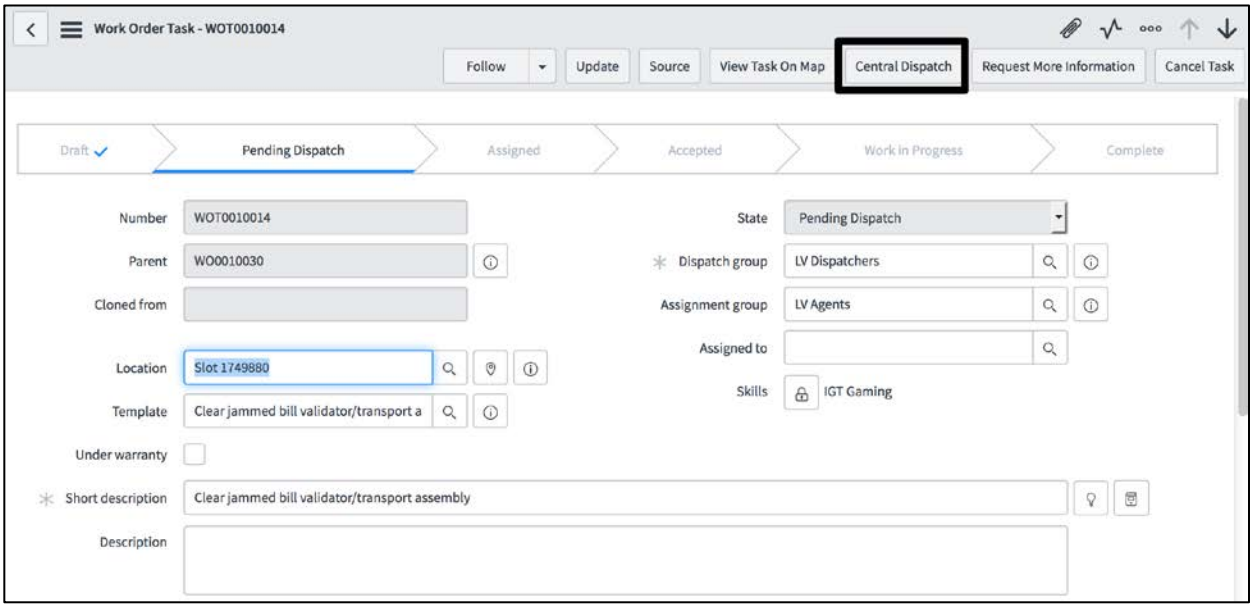
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9. Click the back arrow highlighted in the screenshot.



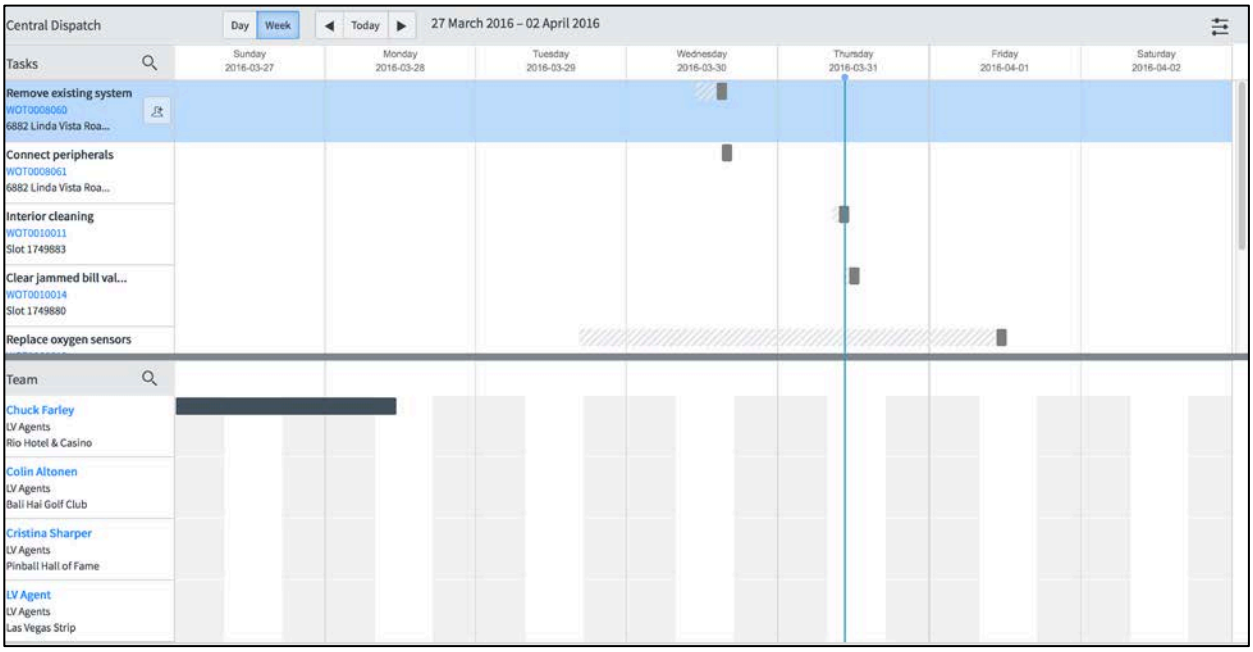
Visual Agent Sourcing

1. Select the **Central Dispatch** highlighted in the screenshot below.

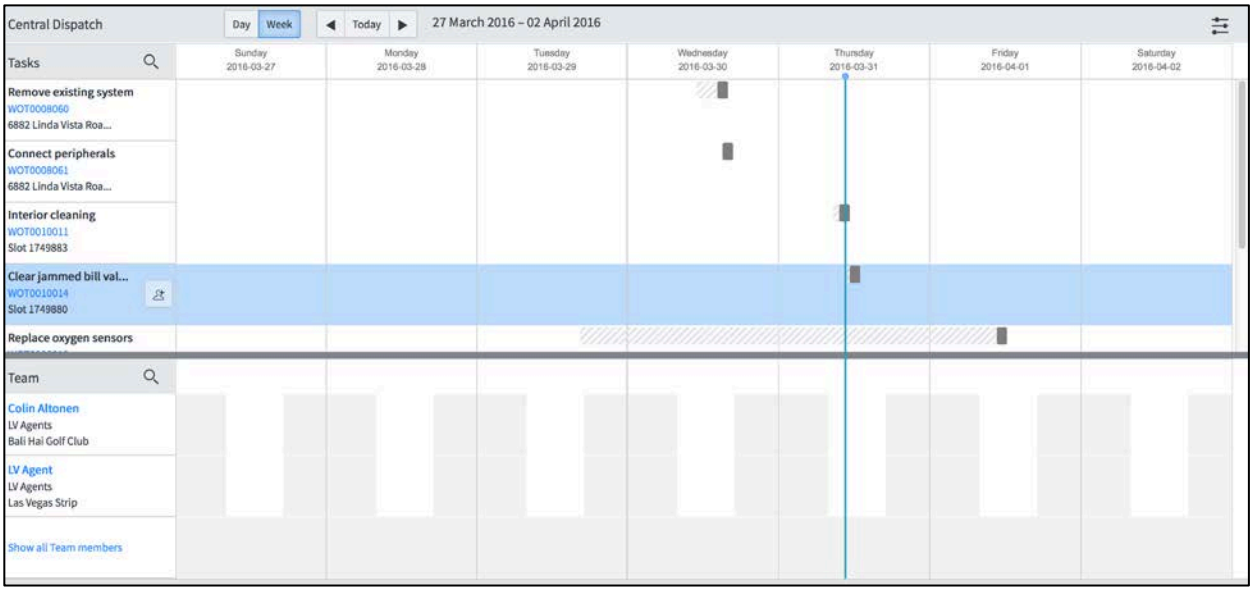


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2. A new window will open in your browser.



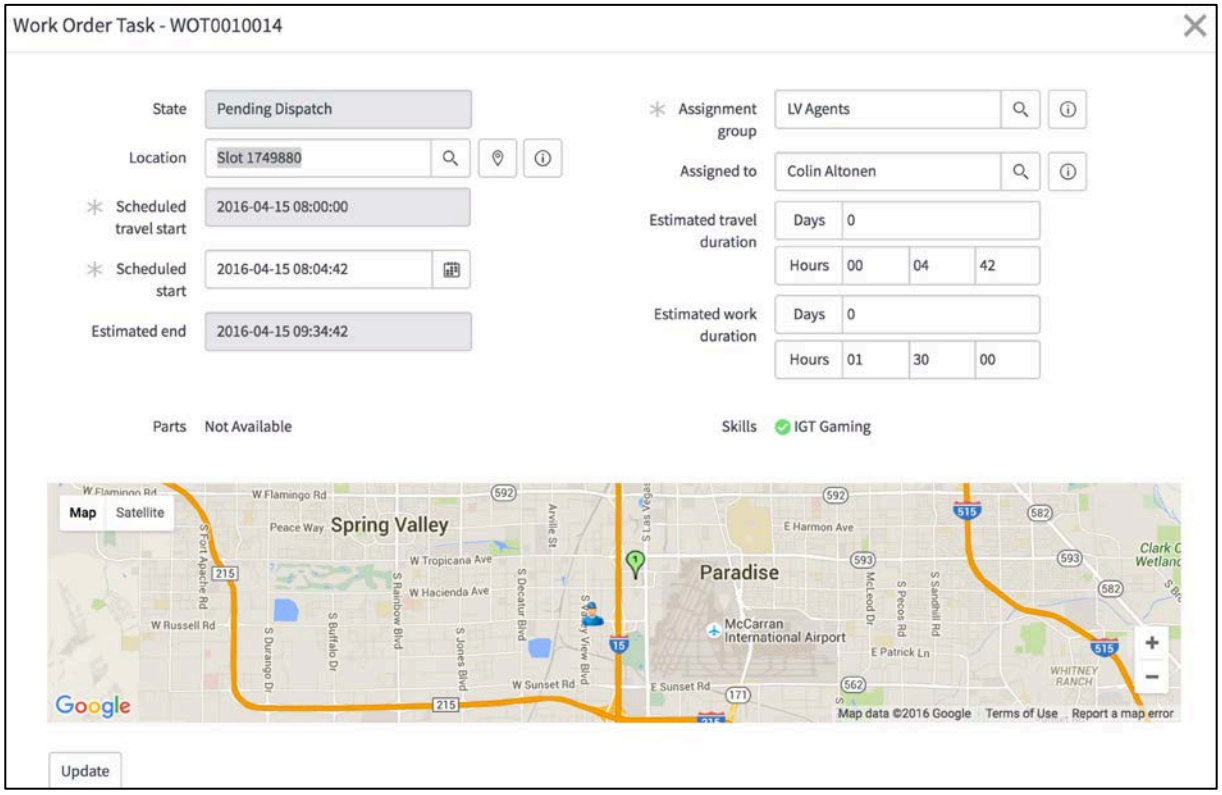
3. Click on the white space next to your Work Order Task to highlight the work order task on the list.



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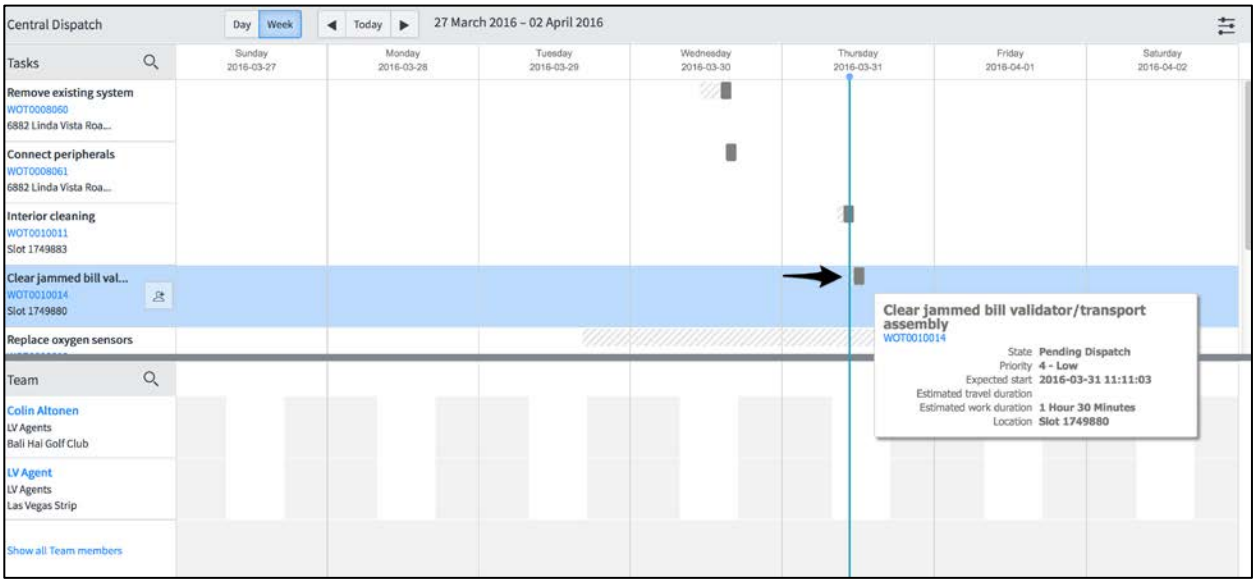
4. Note the difference under the **Team** list, which now shows the recommended agents for assignment. This is based on Skills, Availability, Locations Covered, and potentially Part Requirements (all configurable in the tool).

5. Click the  icon next to the highlighted task to preview the *semi* auto-assigned task, location of task in relation to the proposed agent, as well as estimated travel time that can be auto-calculated using Google's map API. Do not update the task; we will assign this later but know that this is an option. For now, simply X out of the pop-up screen.



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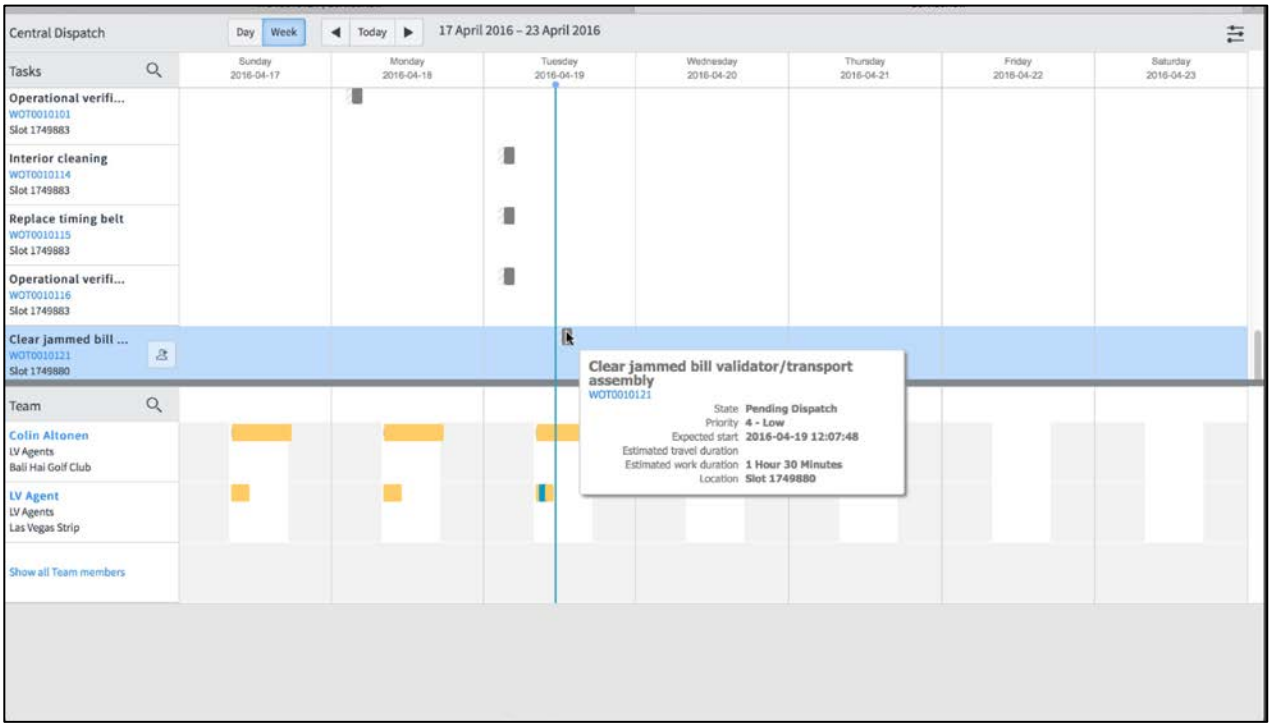
6. Hover over the task on the timeline to see a summary of the task.



7. The following three screenshots attempt to show the drag and drop assignment capability, with the resulting page showing the assignment has taken place along with the map showing the location.

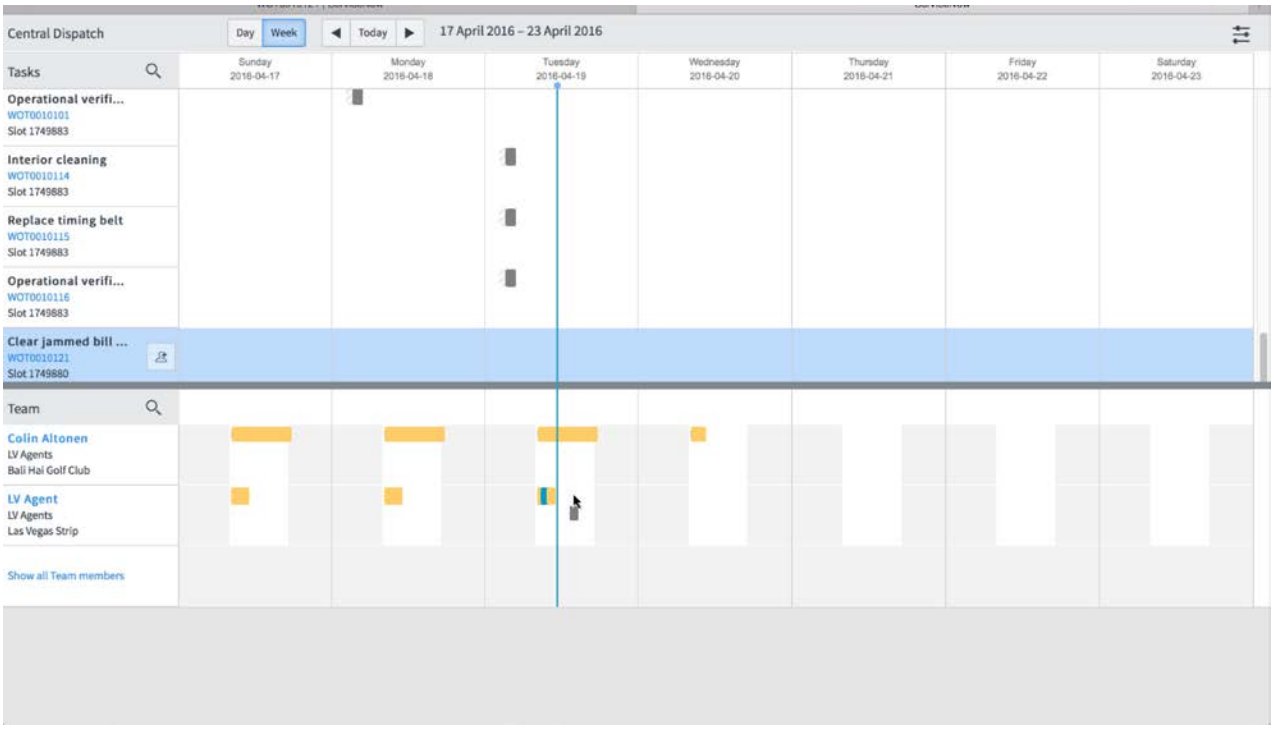
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8. Step One – Select the task and hold with mouse.



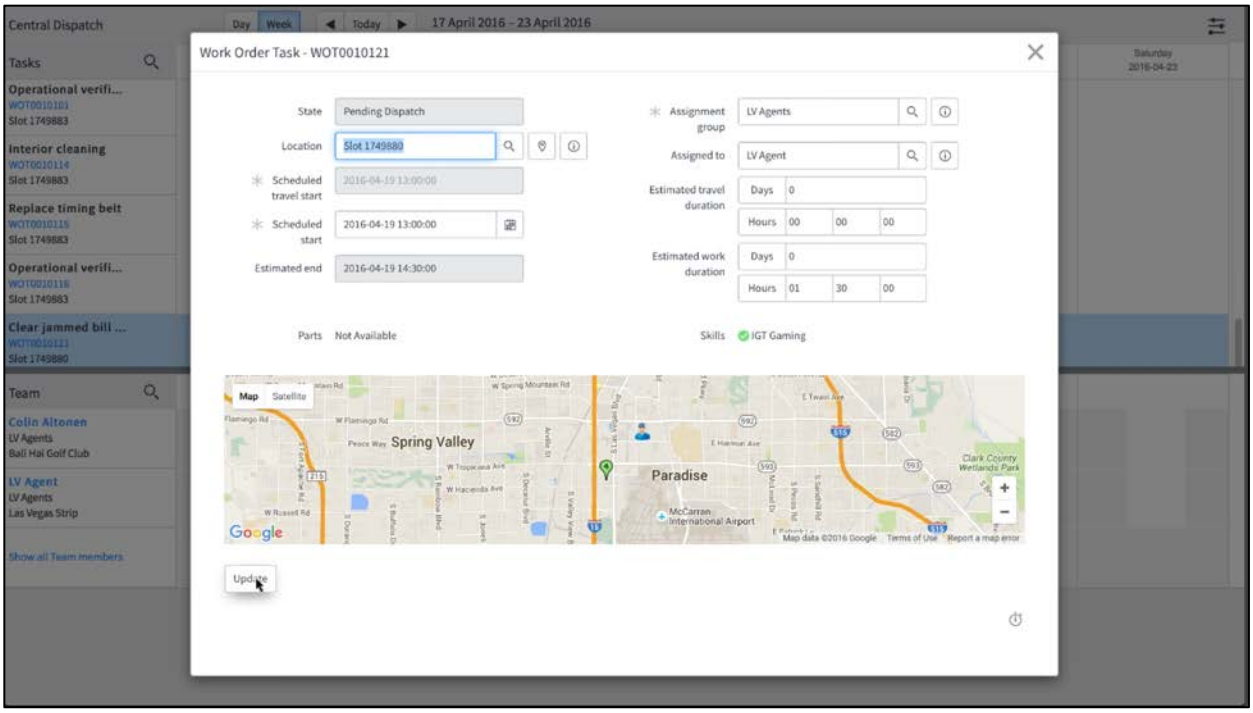
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9. Step Two – Drag down to LV Agent's swim lane and release.



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10. Step Three – Task window opens to show assignment and map. Note that the task has been assigned to LV Agent.



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Lab Goal

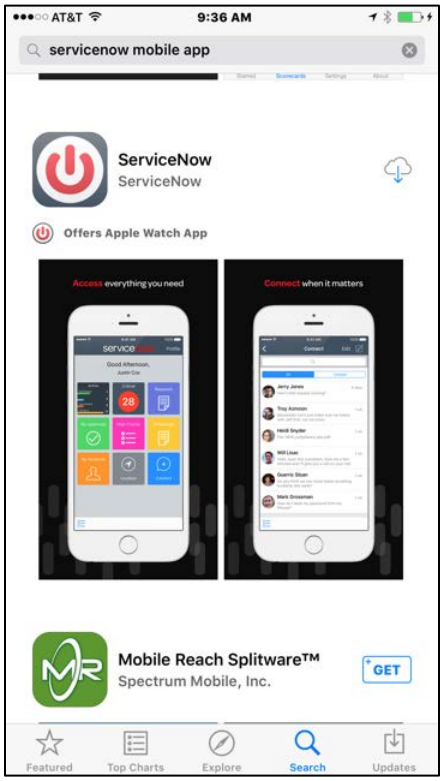
During this lab, we will cover the aspects of Mobility as it pertains to work execution by a field technician.

Lab 5
Mobile

Accessing Mobile iOS Devices

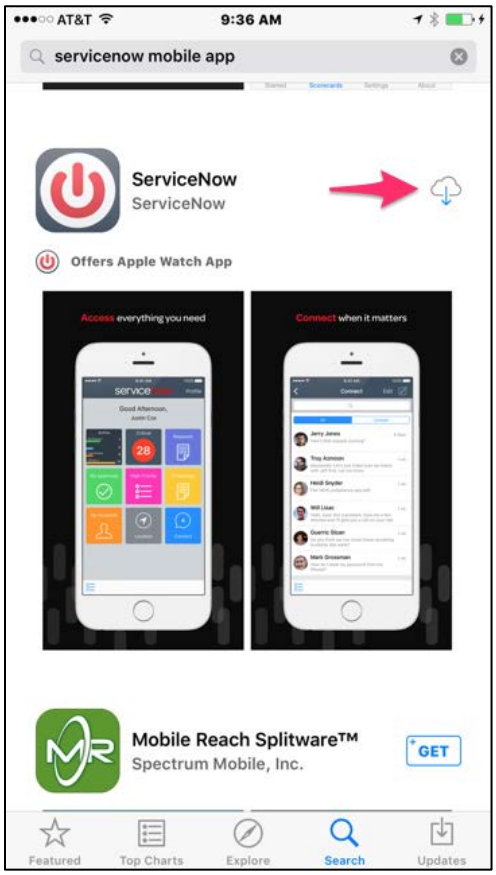
If you don't have an iPhone, please skip to the **Accessing Mobile Non iOS Devices** section where you will use a browser window to demonstrate mobile capabilities. An Android version is coming in the next release. Though there are subtle differences between the two interfaces, you will be able to follow the lab guide using the iOS Screenshots and instructions below.

1. Access the **App Store** and search for **ServiceNow Mobile App**.



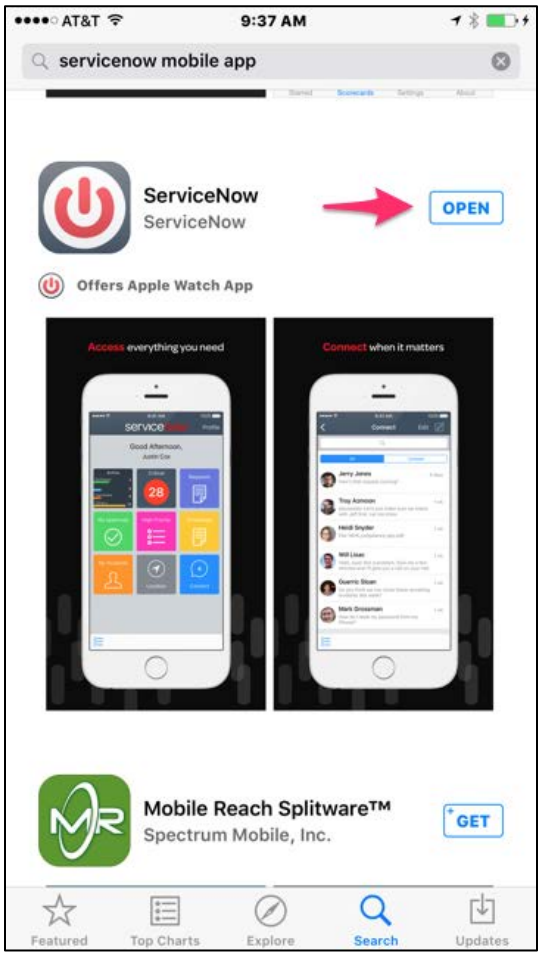
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2. Download the App by clicking the **Cloud** or **Get** icons.



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3. Open the App.



Accessing Mobile Non iOS Devices

1. In an alternate browser, navigate to <instance/$m.do?> .

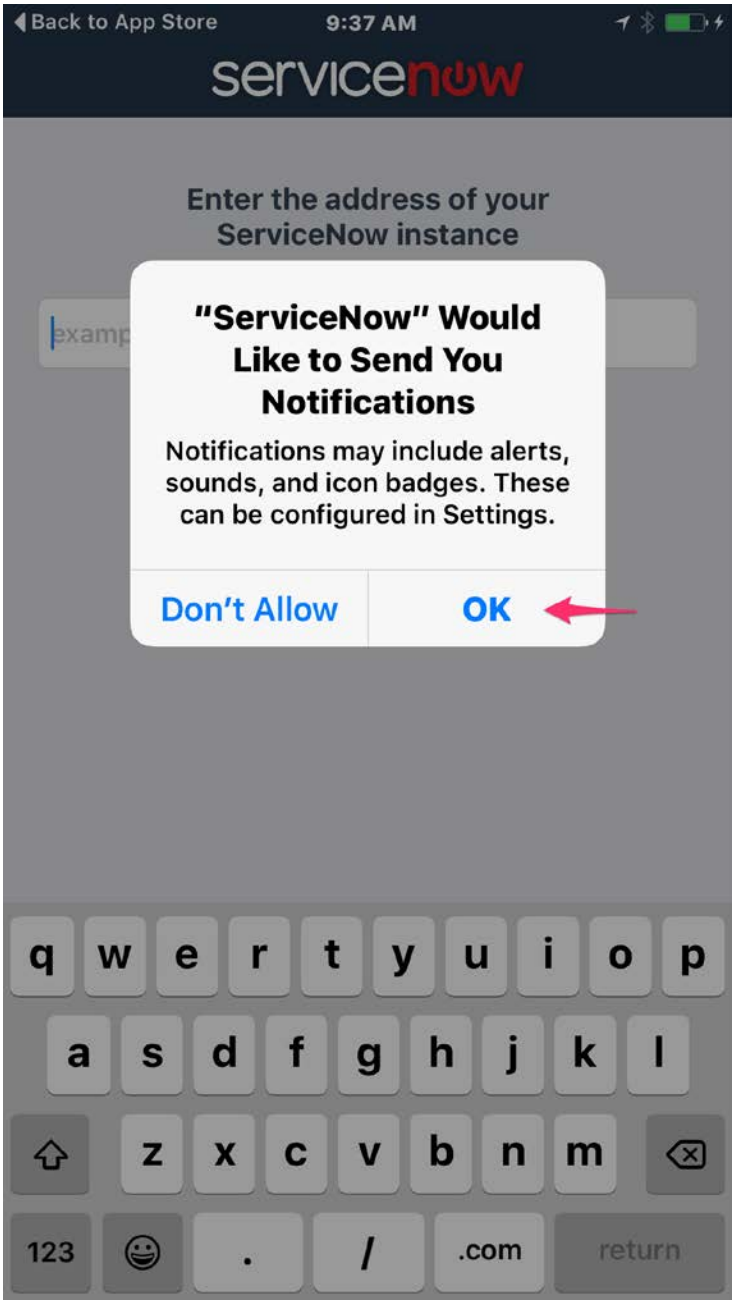
2. Login as **LV_Agent** with **LabPass** as the password and then select **Continue**.



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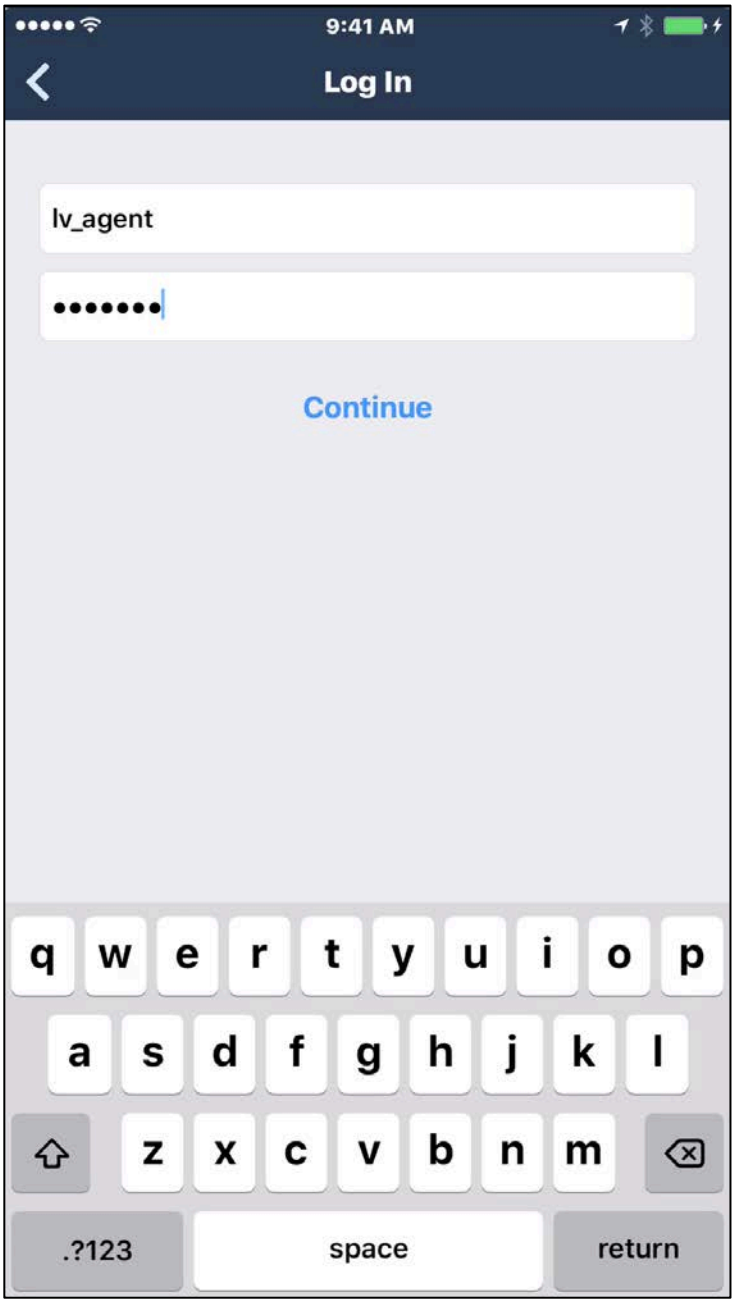
3. Enter your Lab Instance URL.

4. Click **OK** to accept notifications.



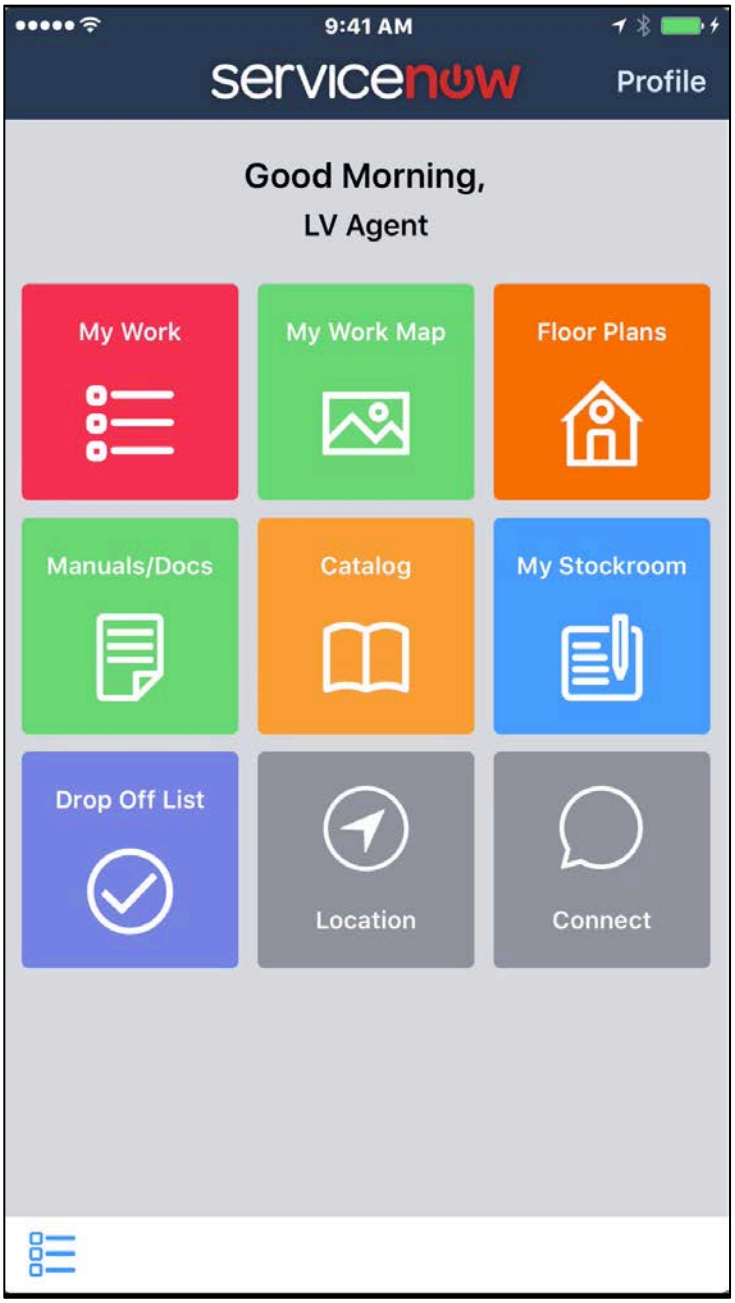
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5. Login as **LV_Agent** with **LabPass** as the password and then select **Continue.**



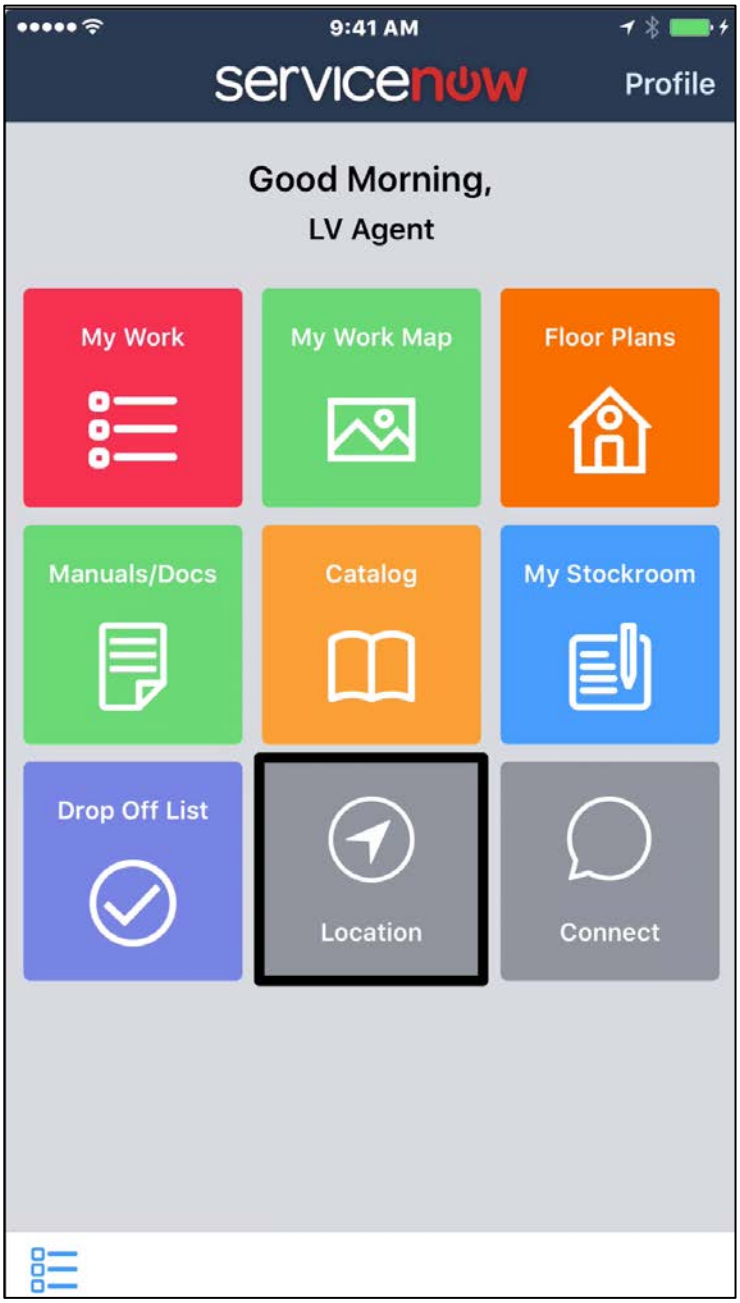
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6. Once you log in, you'll see the mobile homepage with quick links to commonly used Field Service functions.



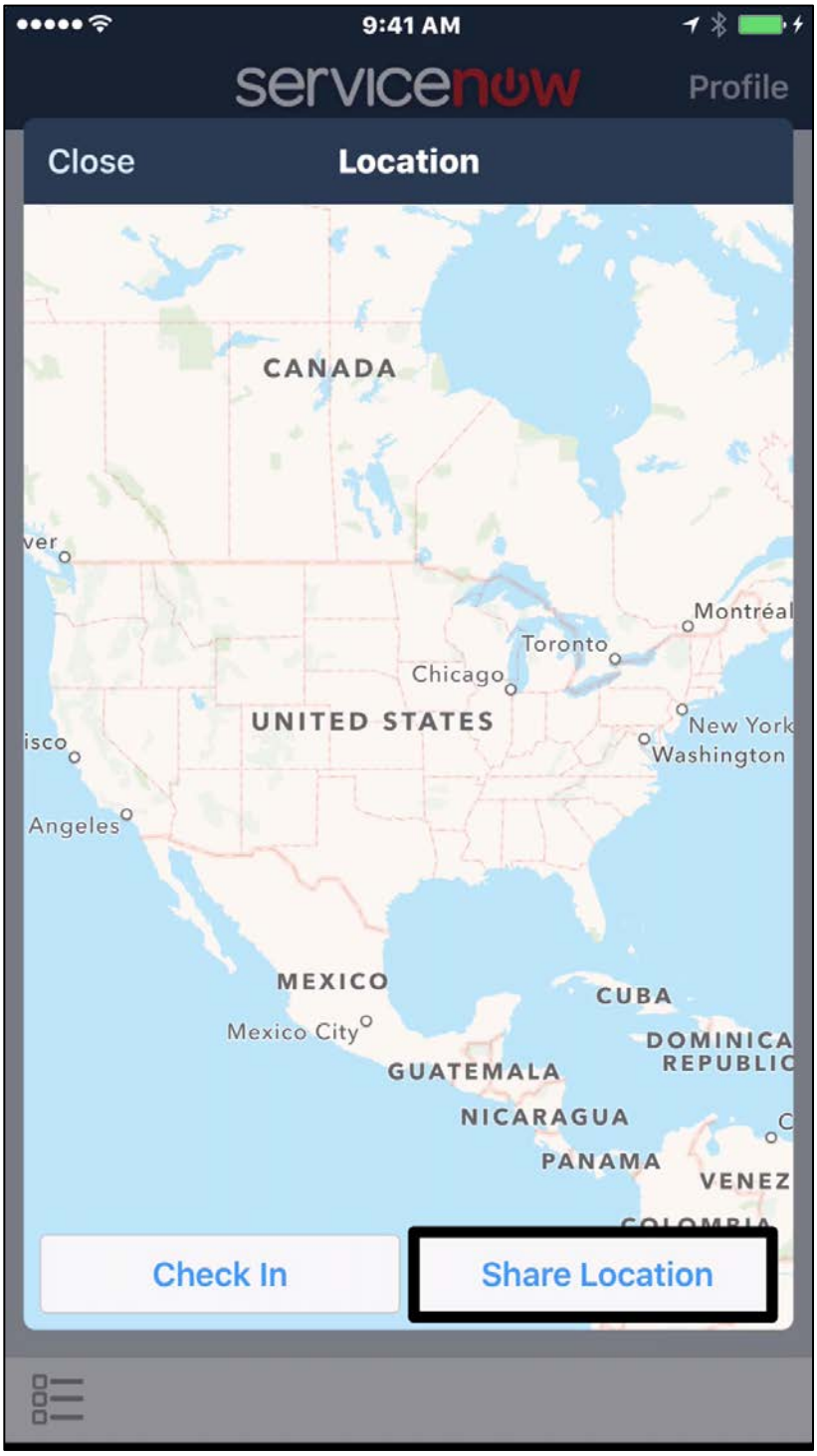
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7. Select **Location**.



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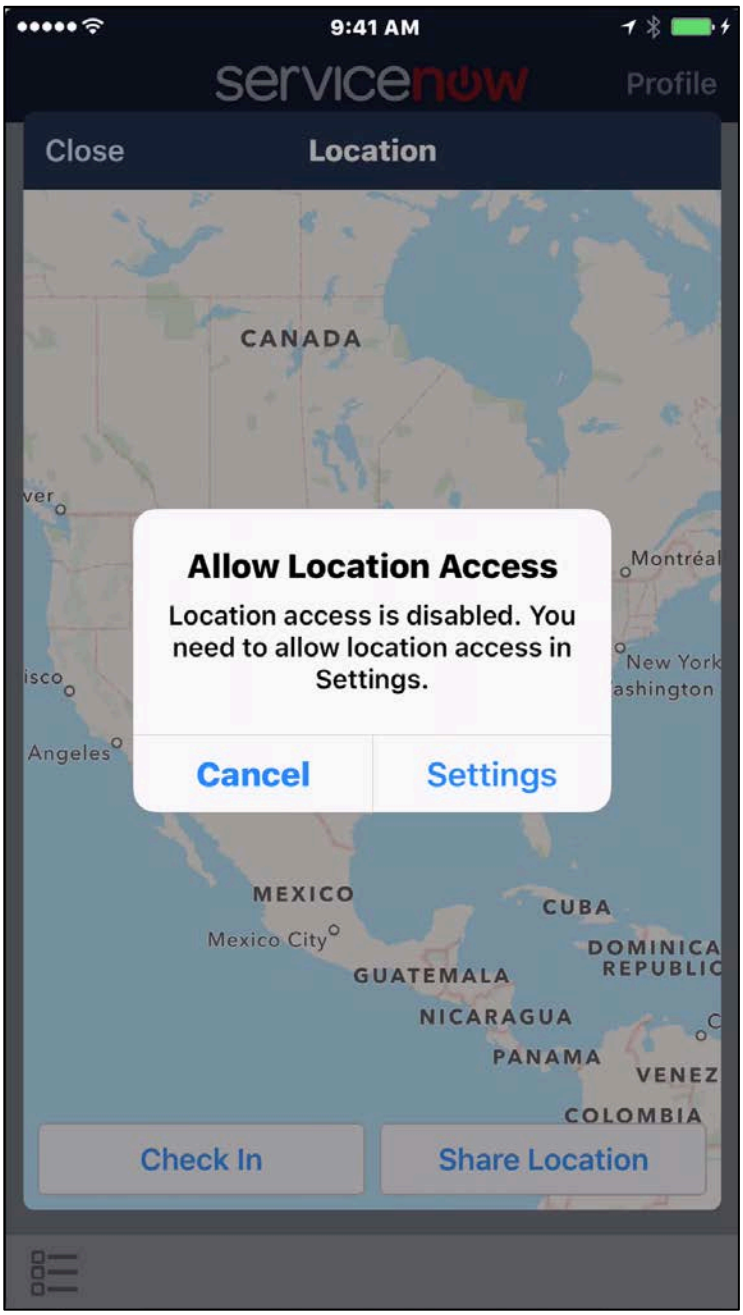
8. Select **Share Location**.



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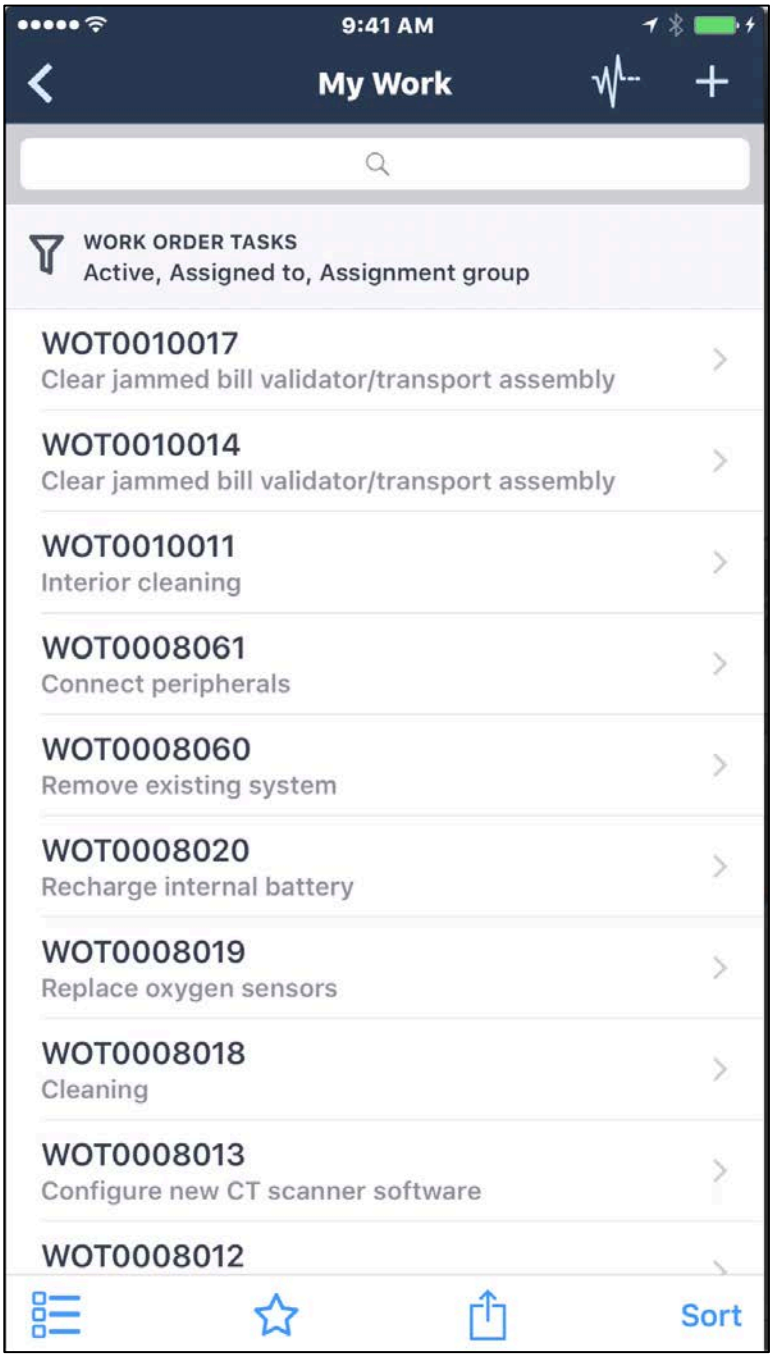
9. You may get a message noting that Location Services are not enabled. Access your phone settings to enable them and then return to share location.

   Note: You could also **Check In**, which simply shares the user's location without the options; try it now.



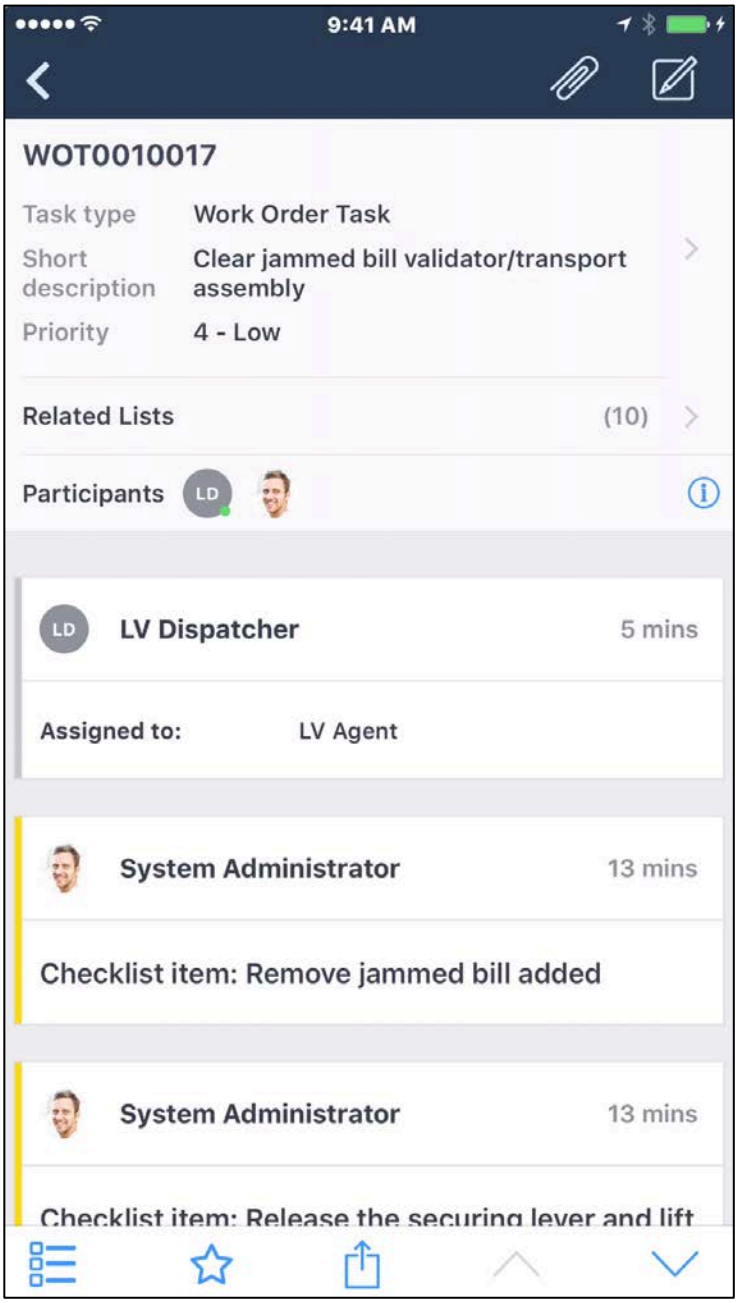
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10. Once you return to the main screen, select **My Work** and following list will be displayed.



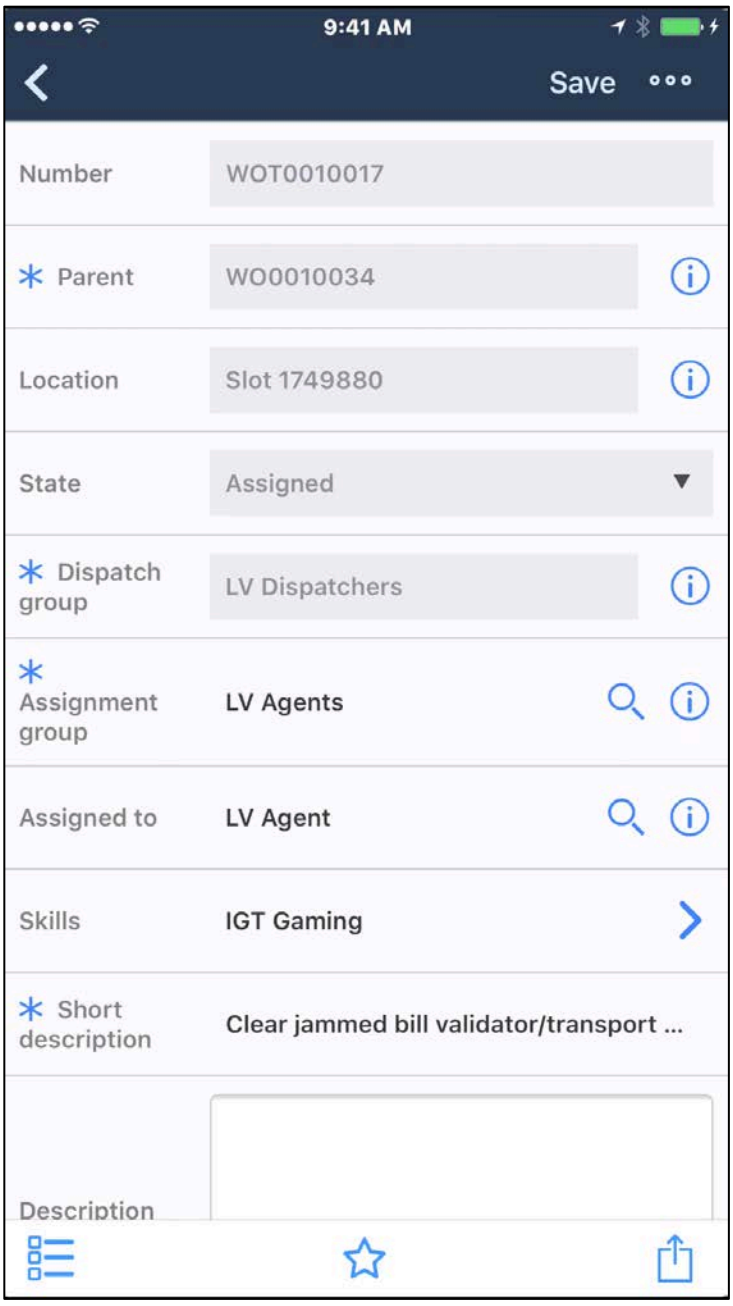
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11. Select the Work Order Task that you wrote down.



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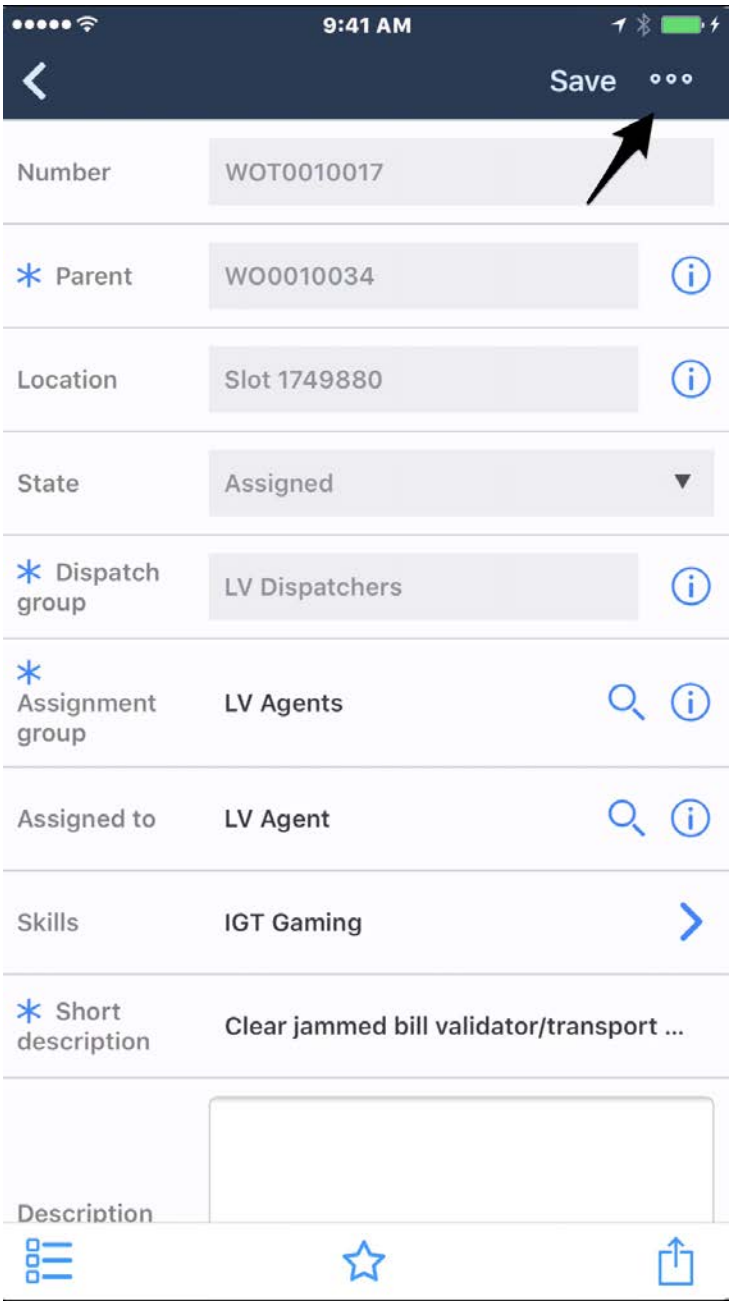
12. Click on the **>** to the right of the Short Description. The detailed view of the work order will open.



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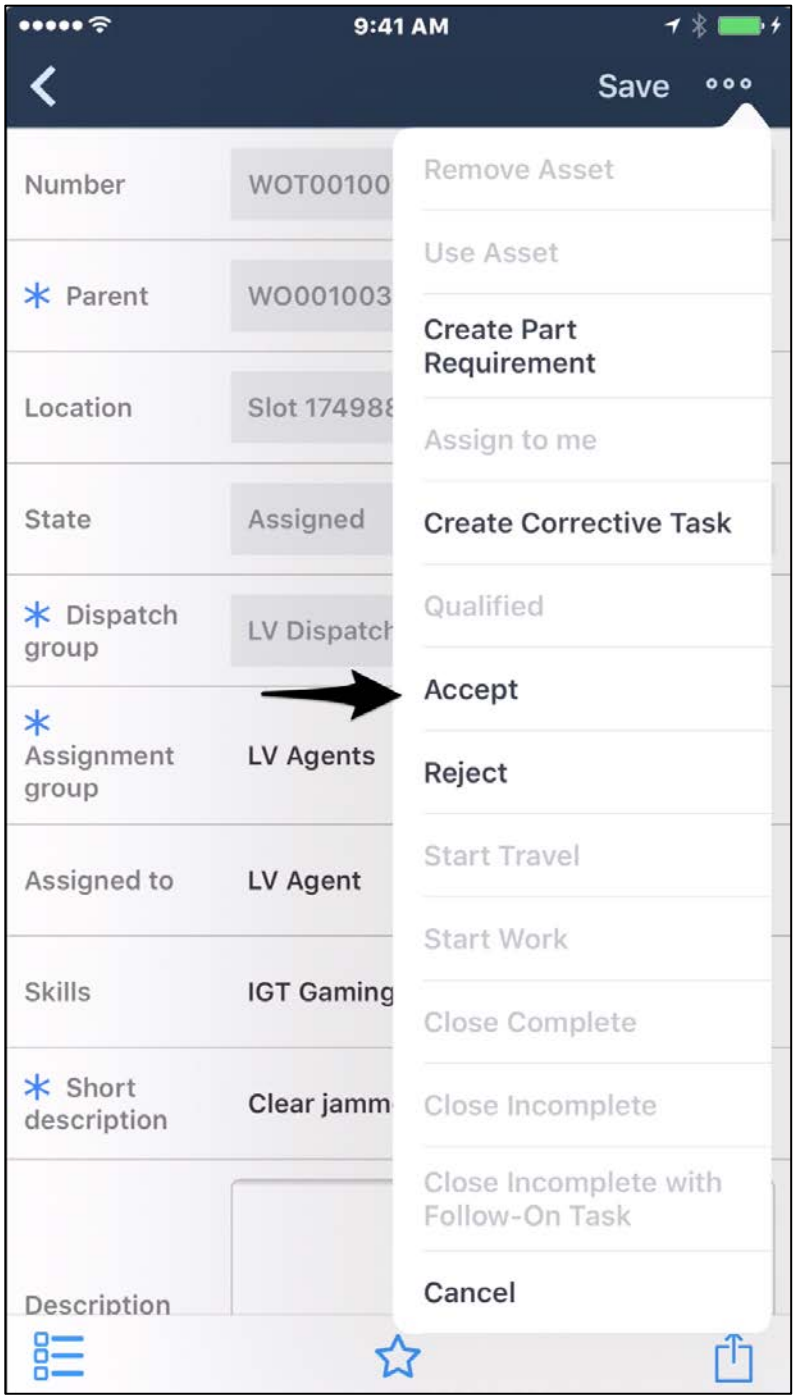
13. Capture the **Location** number for use in a later step. **Note:** Only the number portion of the location needs to be captured.

14. Select the **3 dots** on the top-right of your screen.



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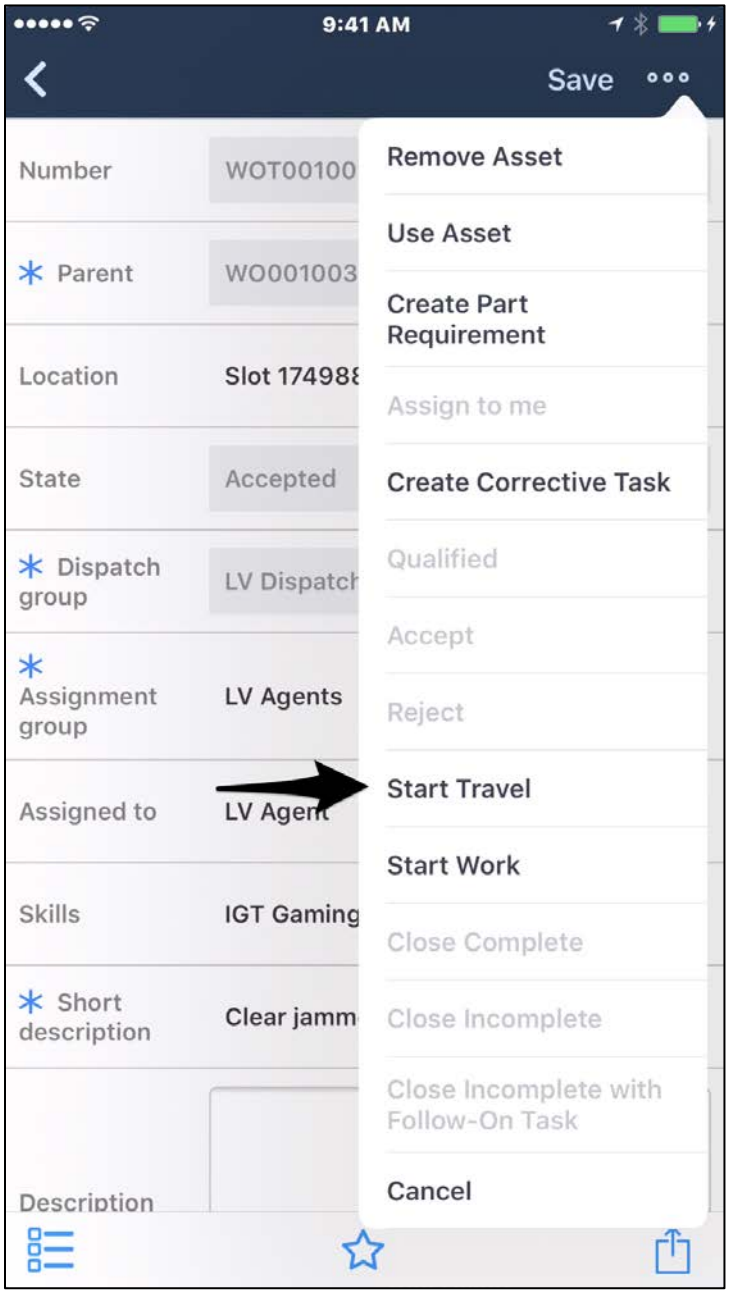
15. Select **Accept** to accept assignment of the work order task. **Note:** The record on your desktop view changes status in real time using “Connect” online presence.



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16. You will be taken back to the previous screen.

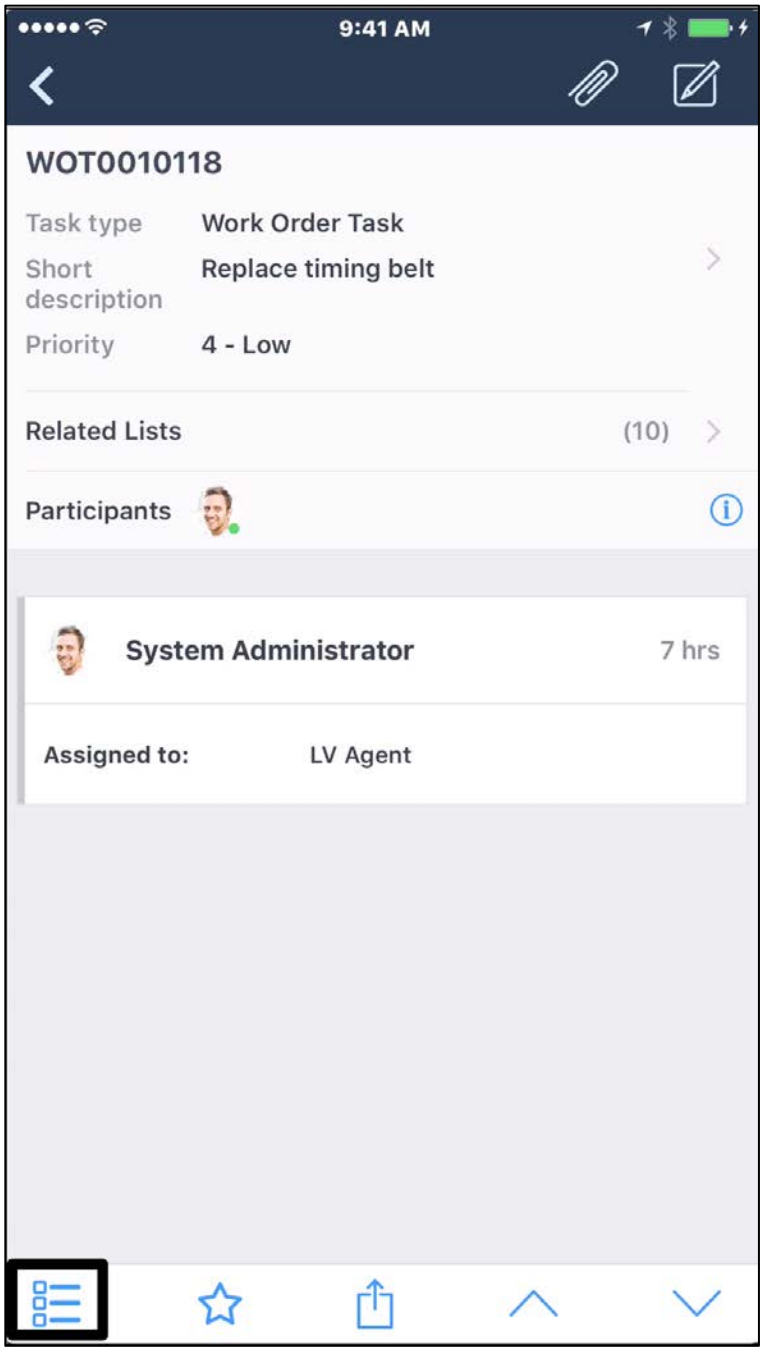
17. Again, select the Three Dots on the top-right of the screen and select **Start Travel**. This assumes your field agent has begun travel to the location where work is to be done, and tracking travel time is important to your organization.



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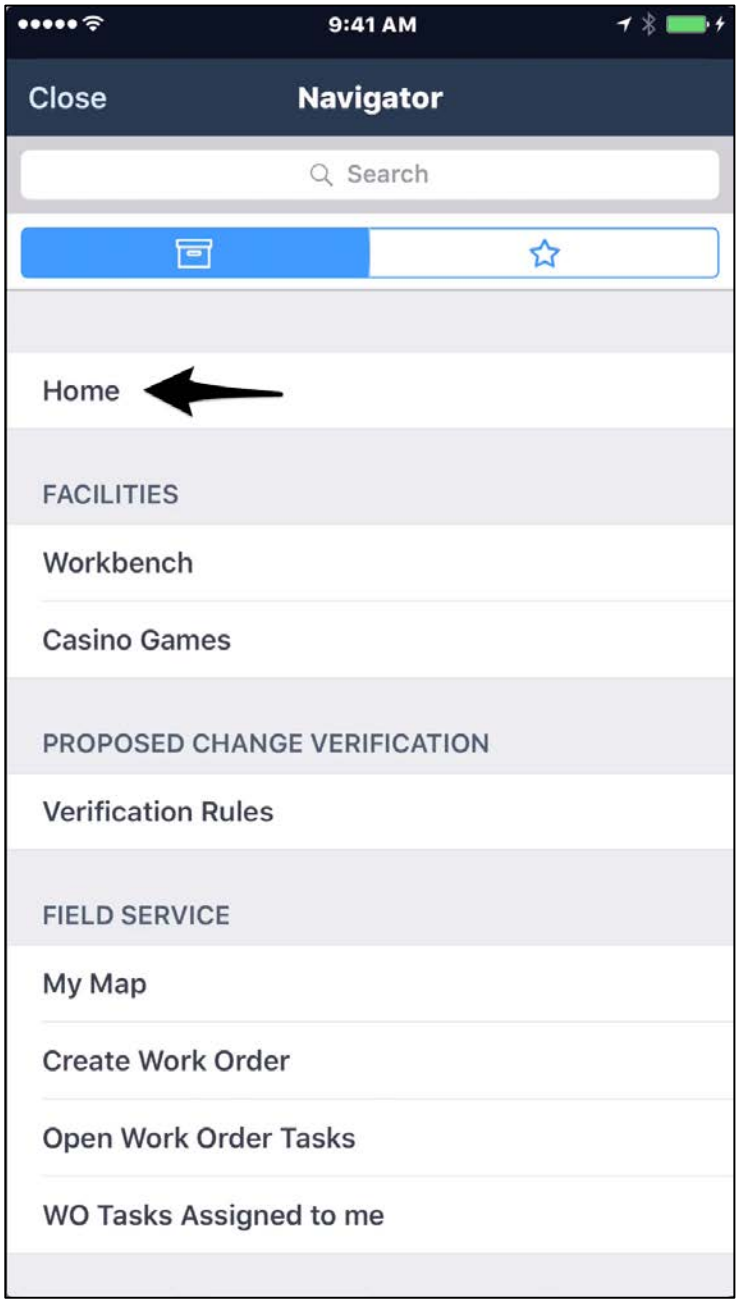
18. You will be taken back to the previous screen.

19. Select the **Dots and Bars** at the bottom-left of the screen.



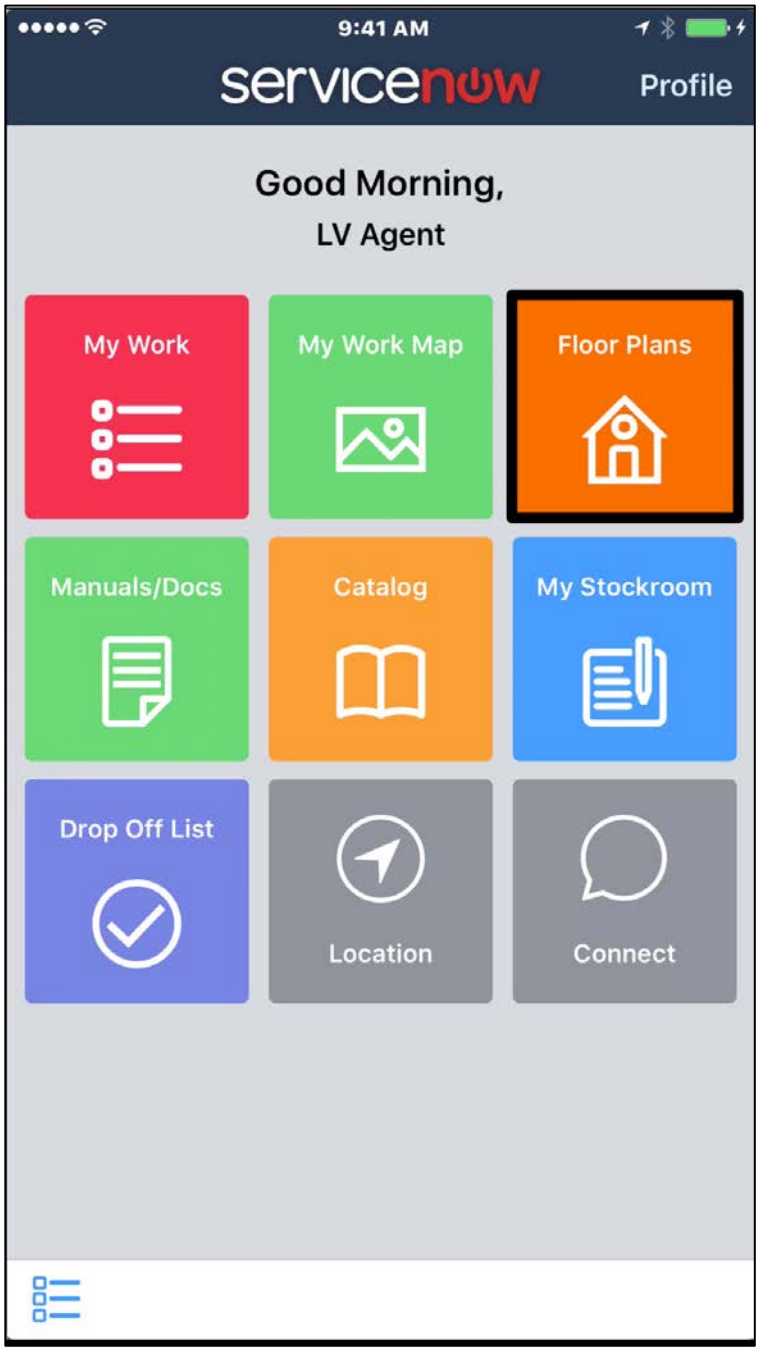
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20. Select **Home** to be returned to the Home Page.



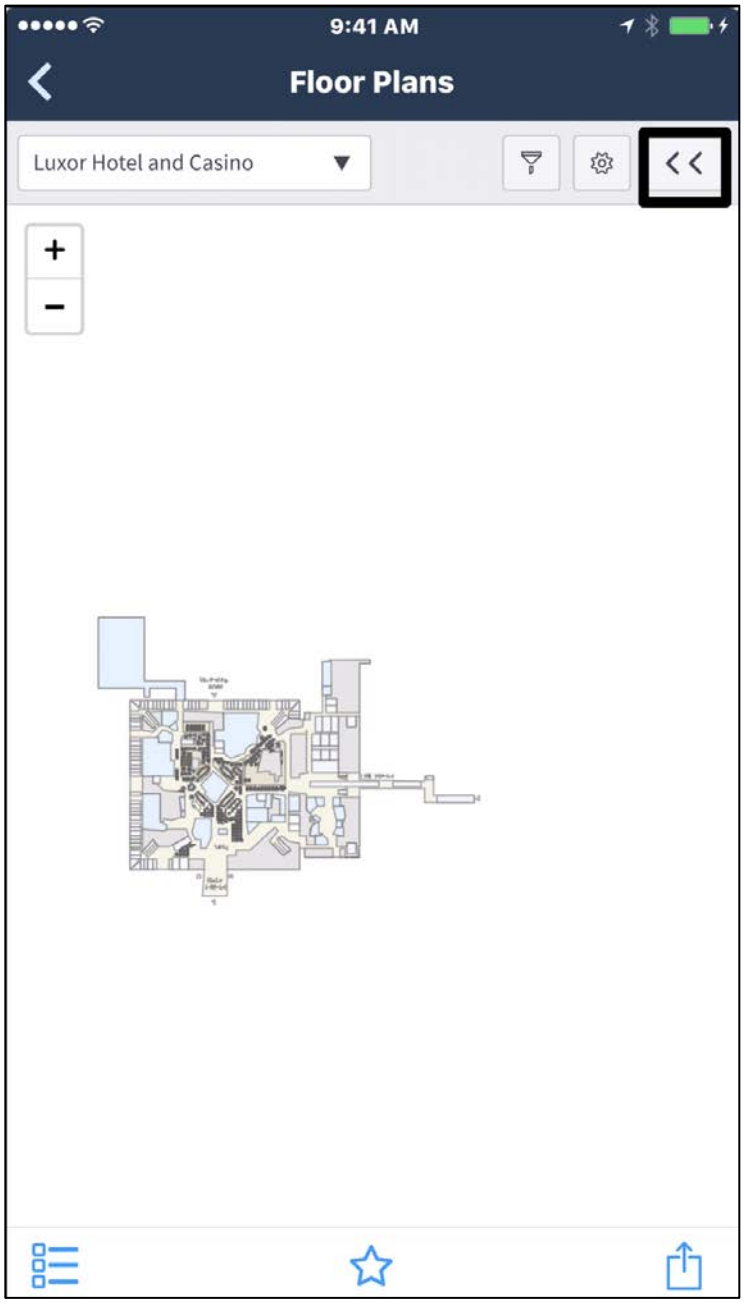
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21. Select **Floor Plans**.



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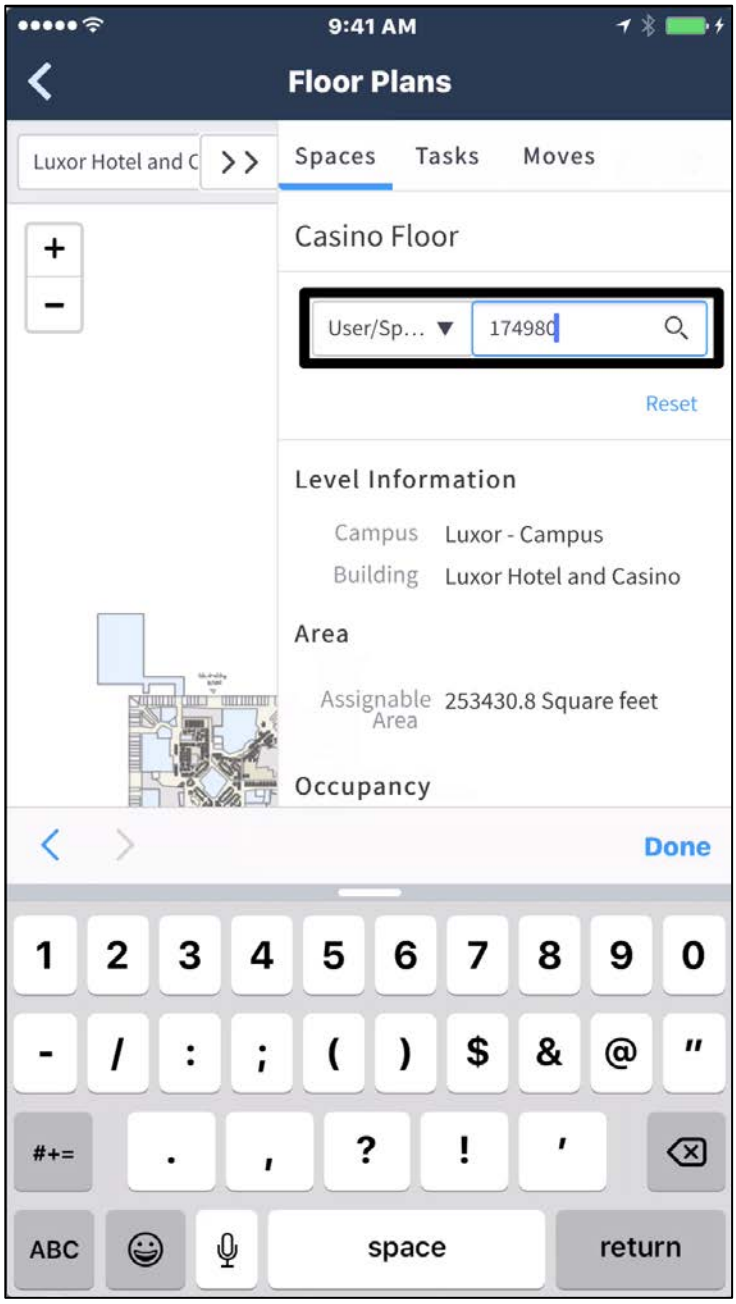
22. Select the **<<** found on the top-right of the map which will open the search capabilities.



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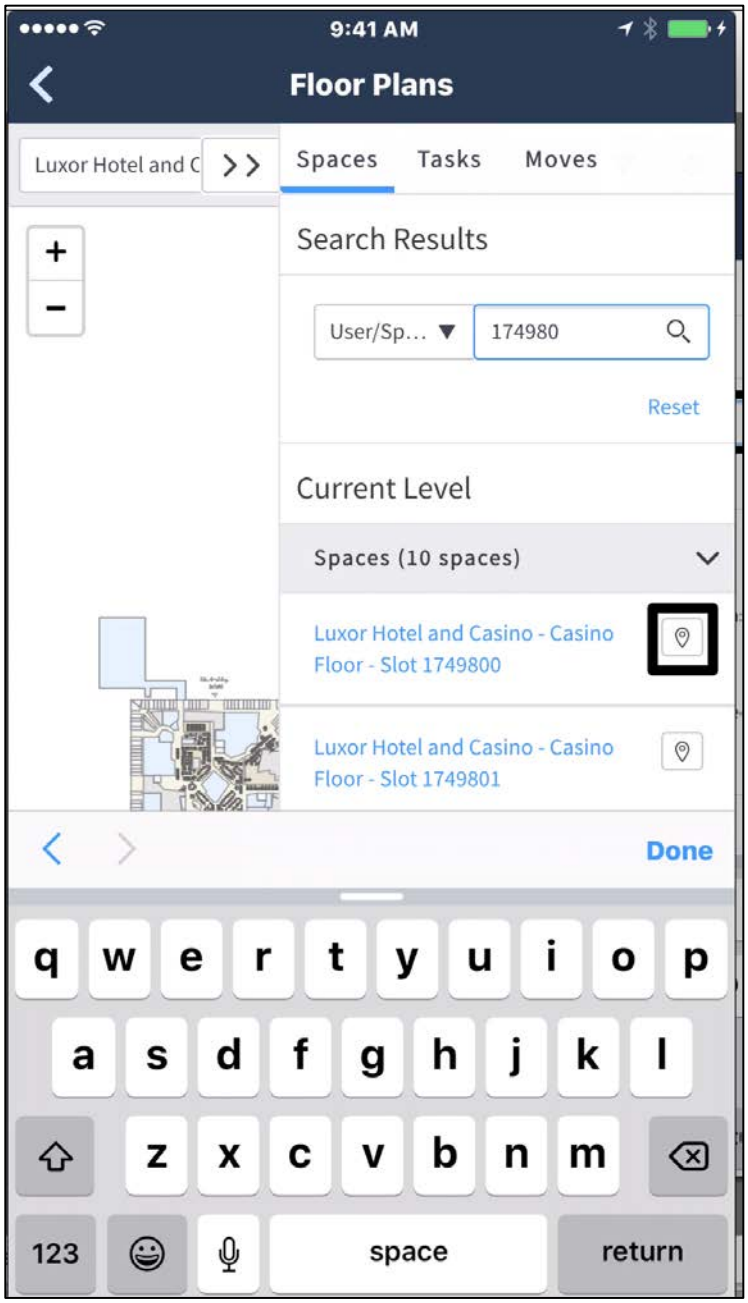
23. In the search field shown, enter the location number you captured earlier.

    Note: Only enter the location number, not the entire name. You must then hit the **Return** button.



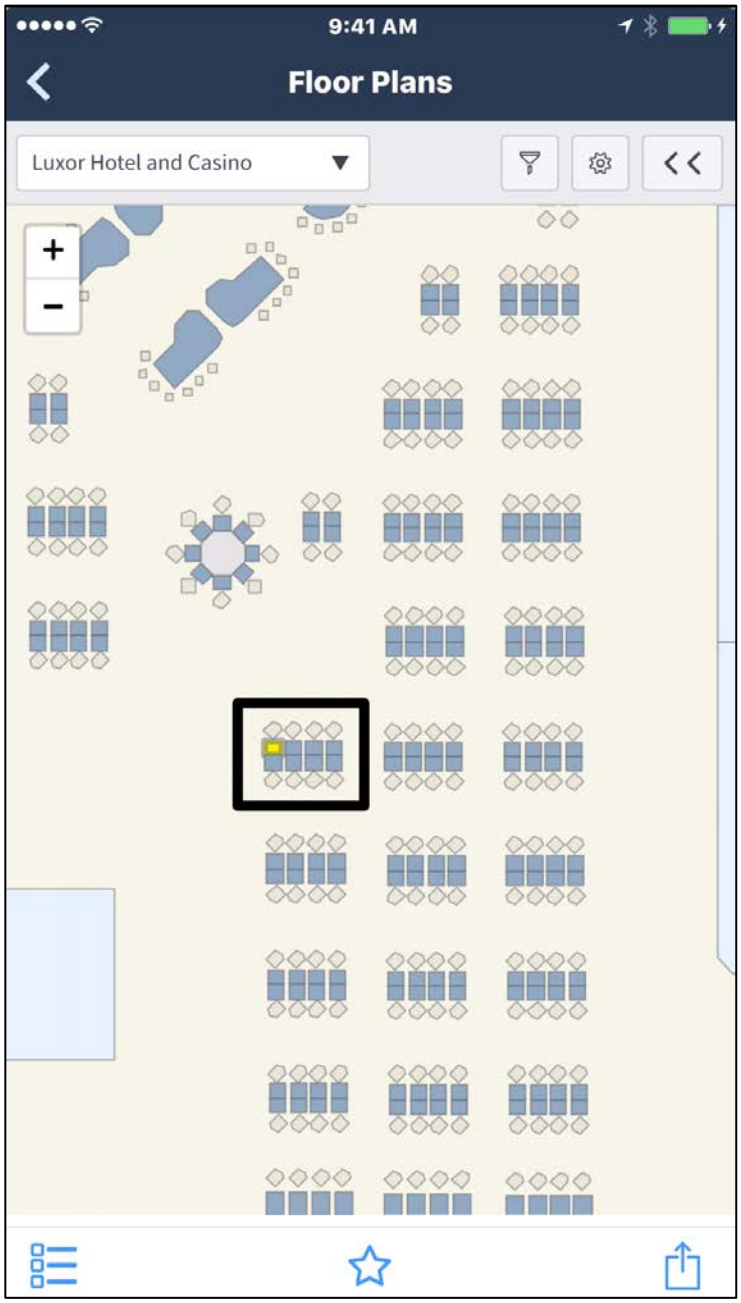
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24. After hitting **Return**, the list will update. Select the map pin just to the right of the location as shown.



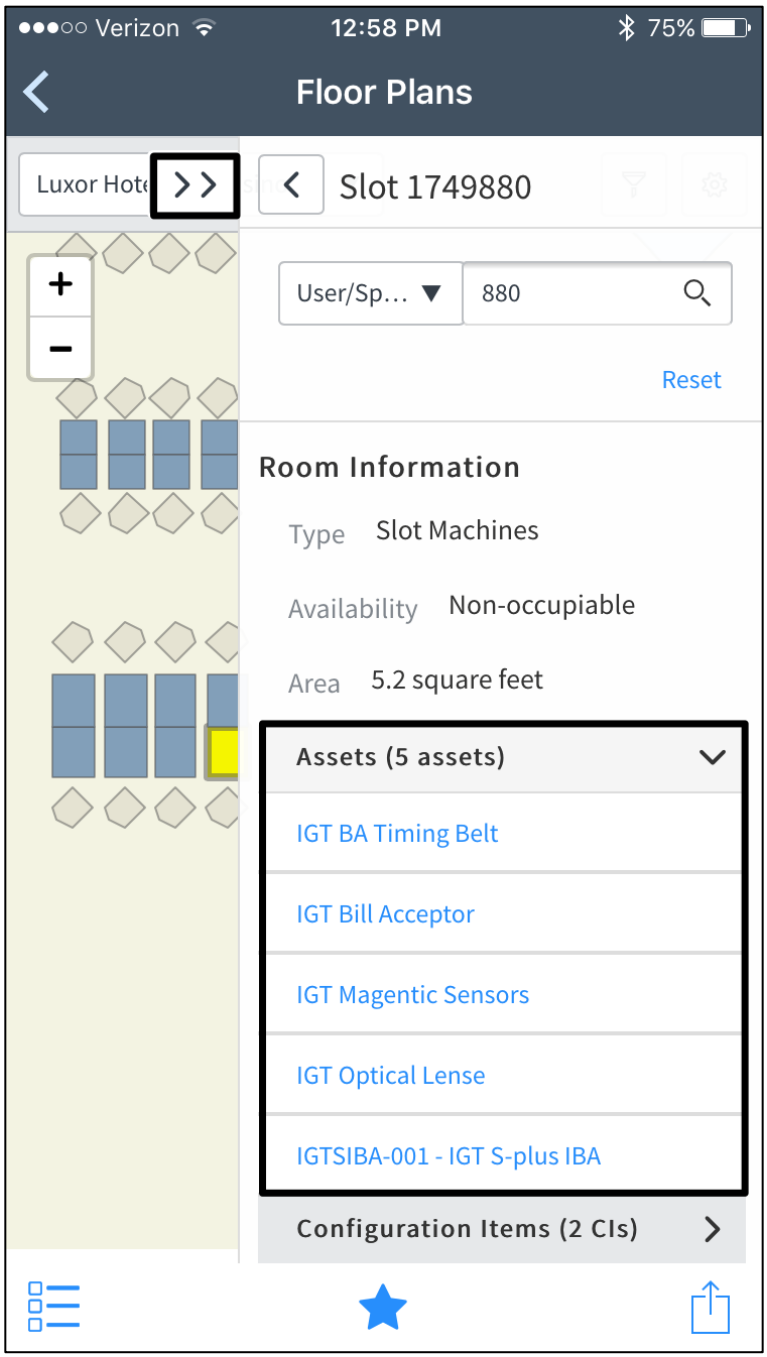
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25. The location you chose will be highlighted in yellow. You can pinch and zoom to find the location of the slot machine we'll be working on.



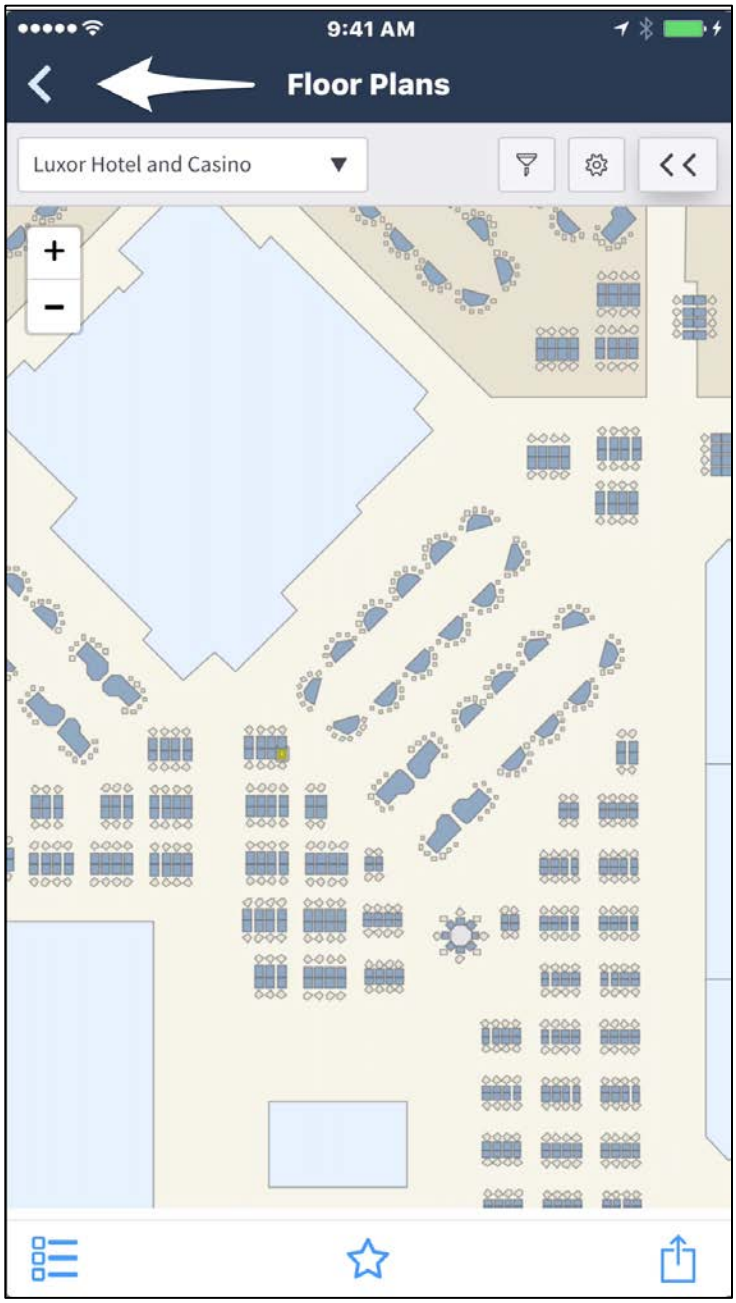
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26. Once the map loads, view the list of assets assigned to that slot machine, then select the **>>** as shown to close the search window.



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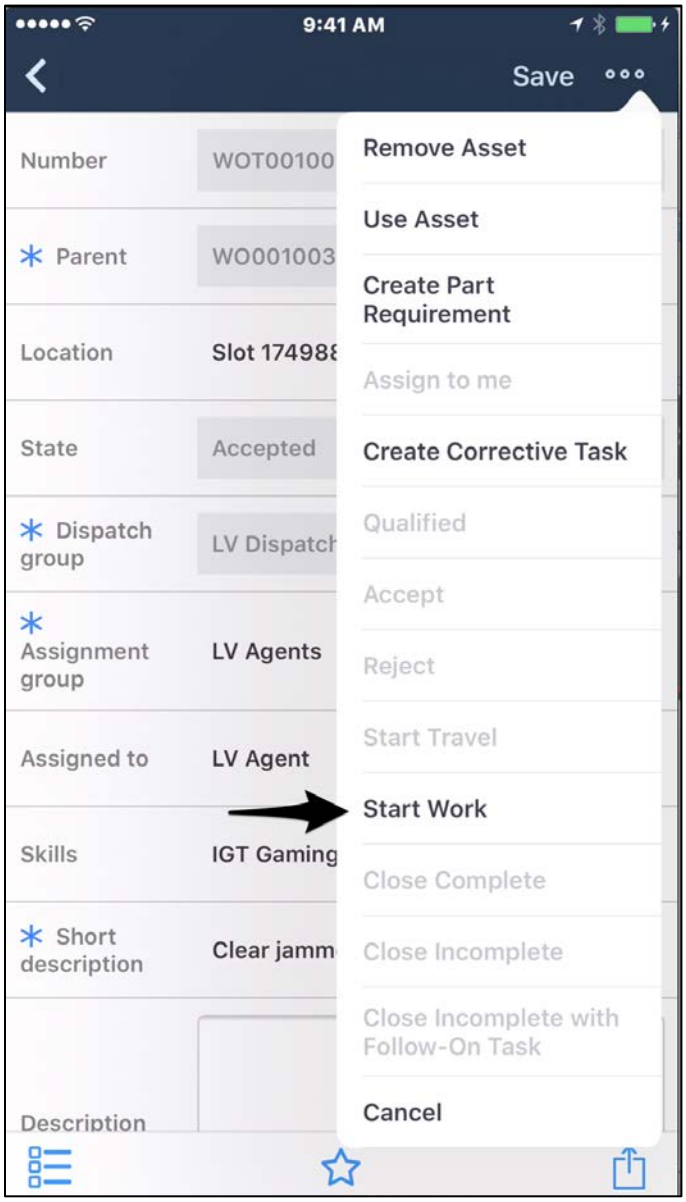
27. Click the **Back** Arrow to return to the Home Page and access **My Work** to go back into the Work Order Task.



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28. Once back on your Work Order Task summary screen, you will need to select the **>** to the right of the short description again. Once there, select the **Three Dots**. This time, select **Start Work**. This assumes that you've gotten to your location and have begun doing actual work, which will update the ticket with total travel time and the start time of your work.

    Note: On the desktop view of the record, you'll notice the travel and start times have updated in real time.

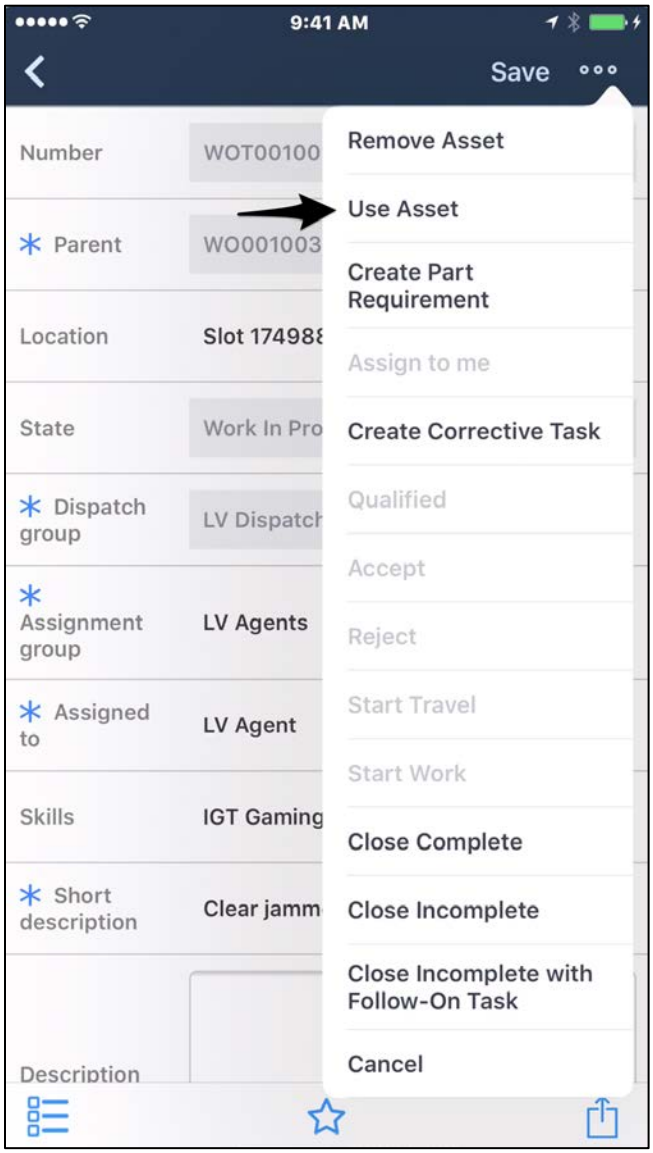


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29. You will again be taken back to the previous screen.

30. Select the **Three Dots** again and this time select **Use Asset**.

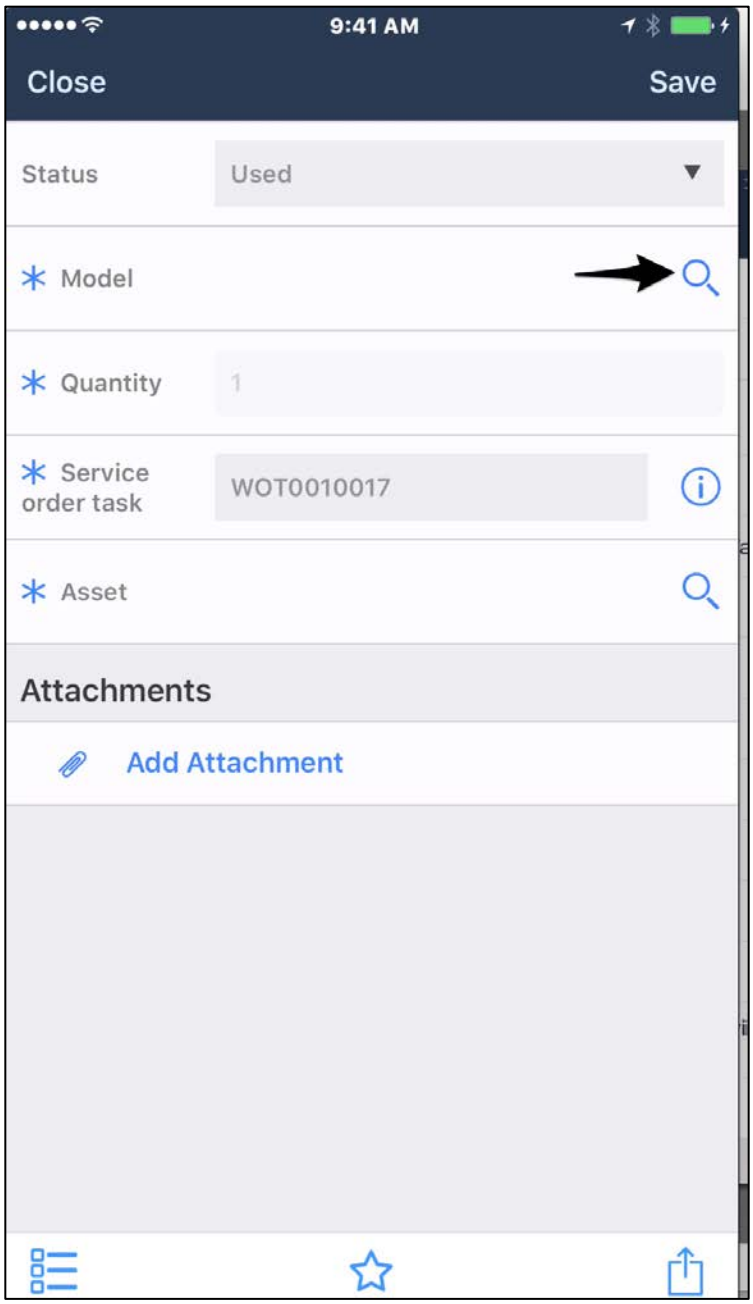
Note: This feature allows the technician to replace the defective asset or component with an operational one they may have in stock. If this asset will be returned, you would select **Remove Asset** first. This captures the asset being removed in the agent's personal stockroom. For the lab, we are simply going to use the asset as it is a consumable item that we assume will be discarded.



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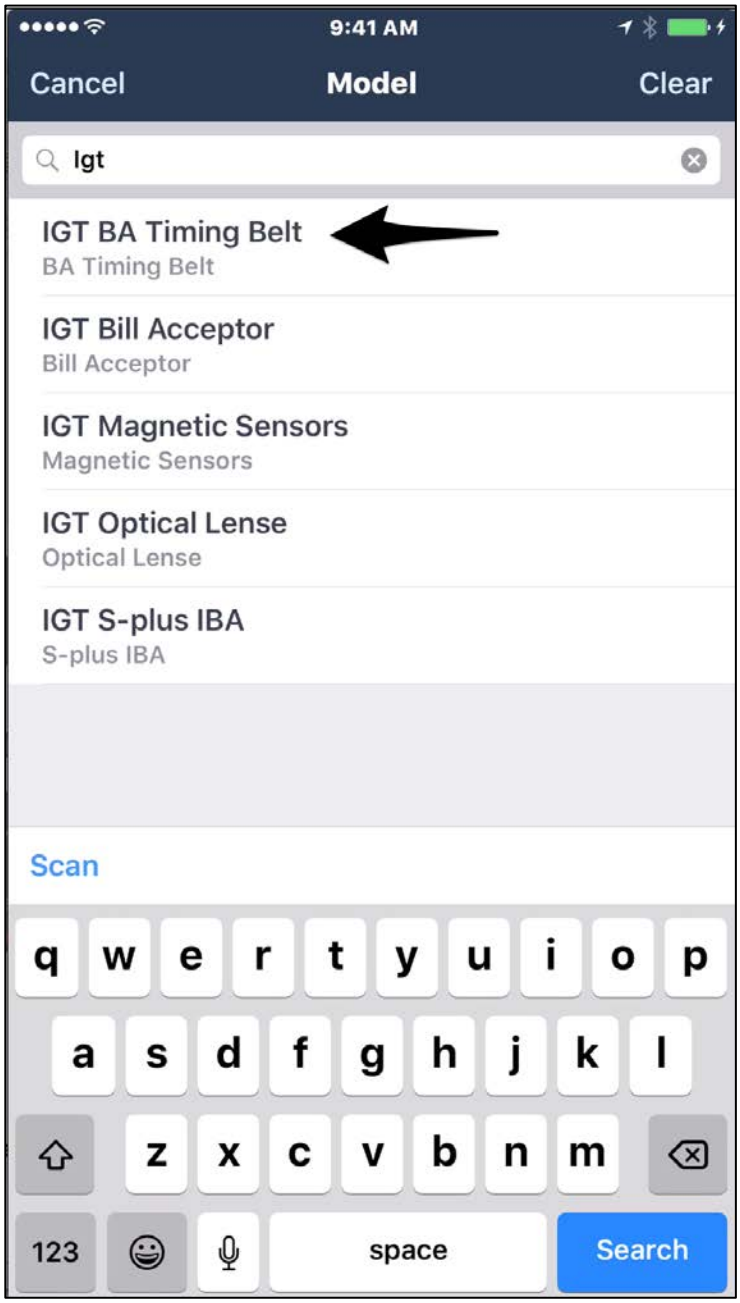
31. The Use Asset Dialog will open.

32. On the **Model**, select the magnifying glass.



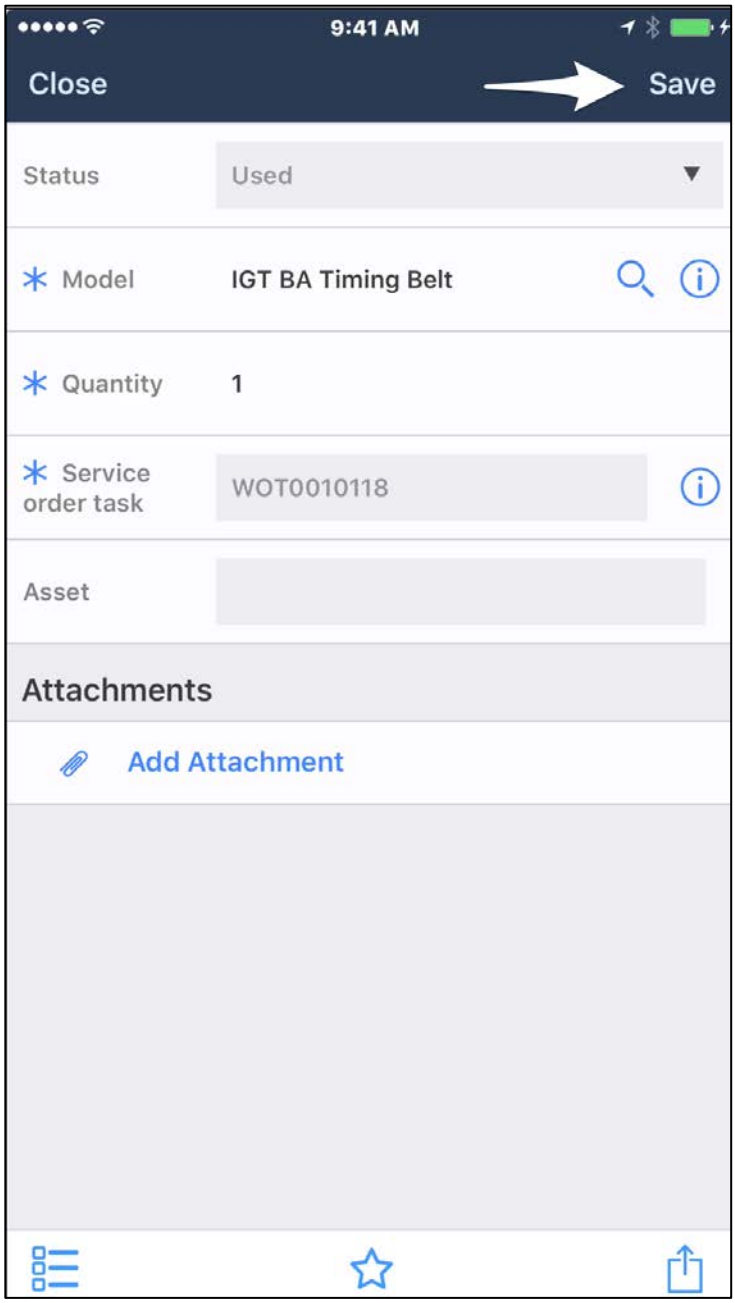
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33. In the query bar, type **IGT** then select the **IGT BA Timing Belt** from the list.



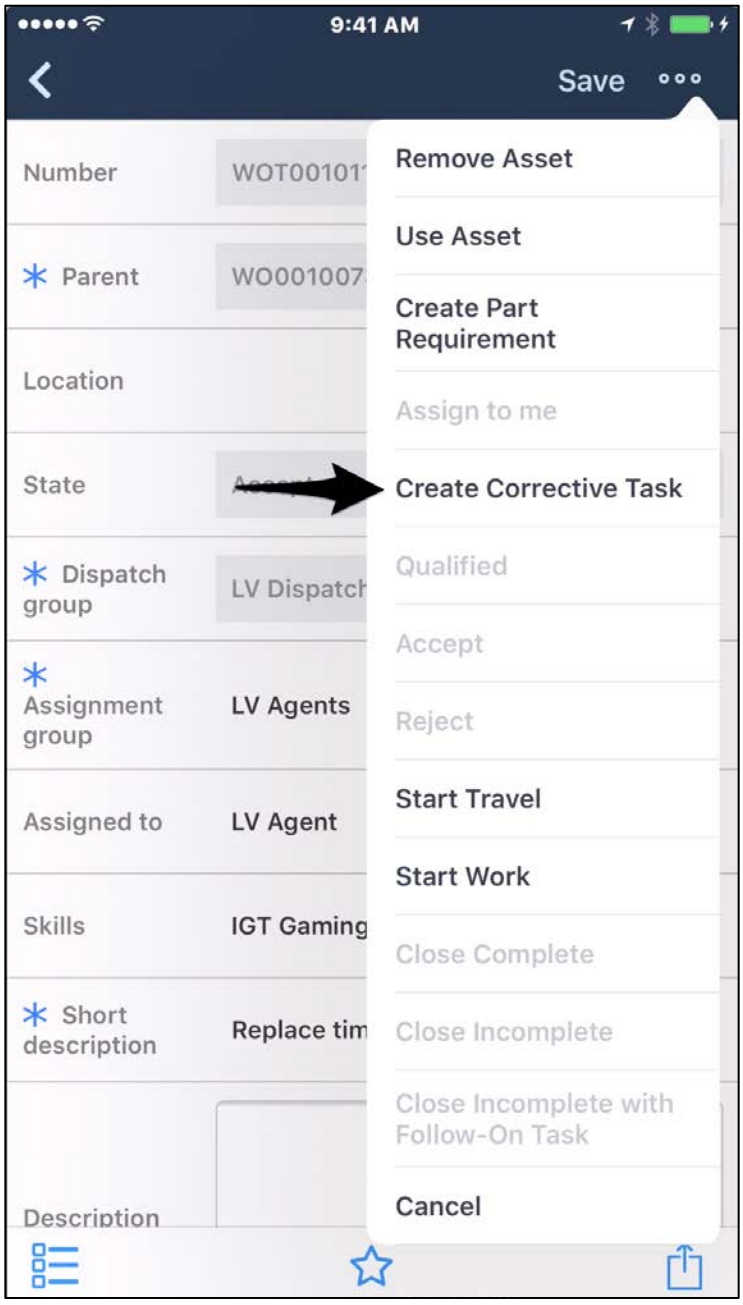
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34. Select **Save**. (**Note:** The status of the asset is set to used, showing that we've consumed an asset to repair this slot machine). Once the record saves, select **Close** to return to the previous screen.



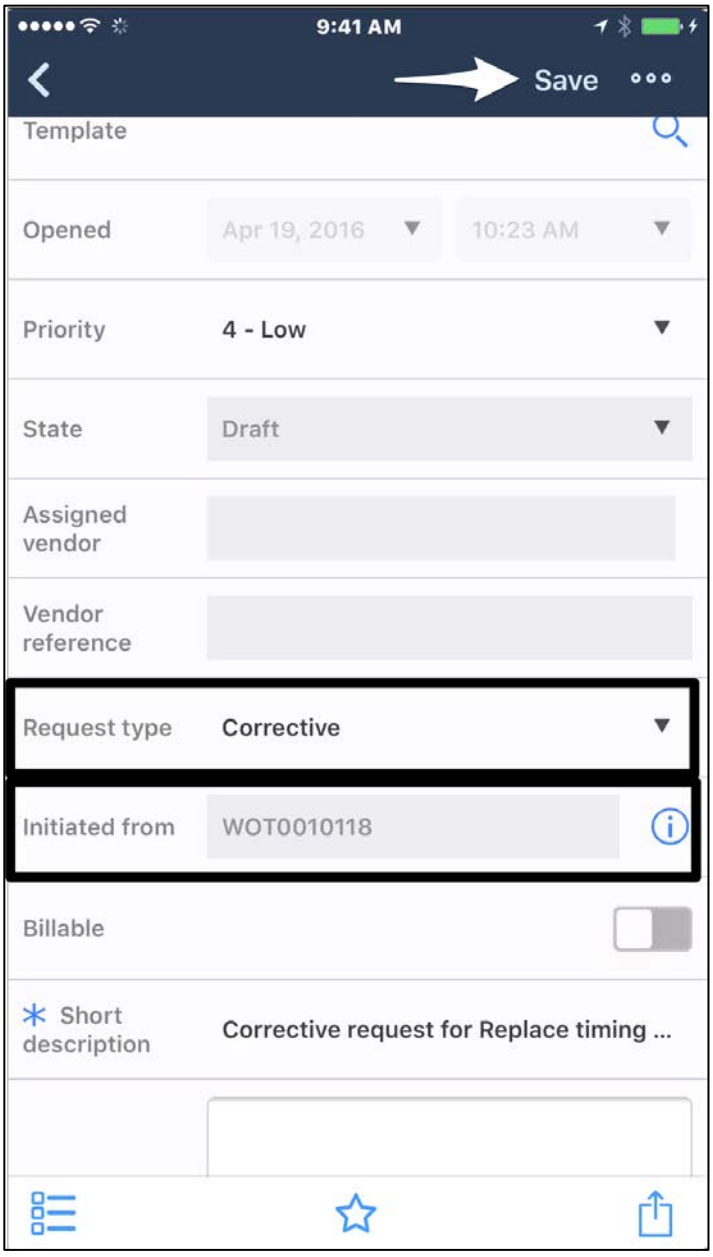
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35. Click the **Three Dots** and choose **Create Corrective Task**. **Note:** This is used when an agent wants to report an unplanned issue while in the field.



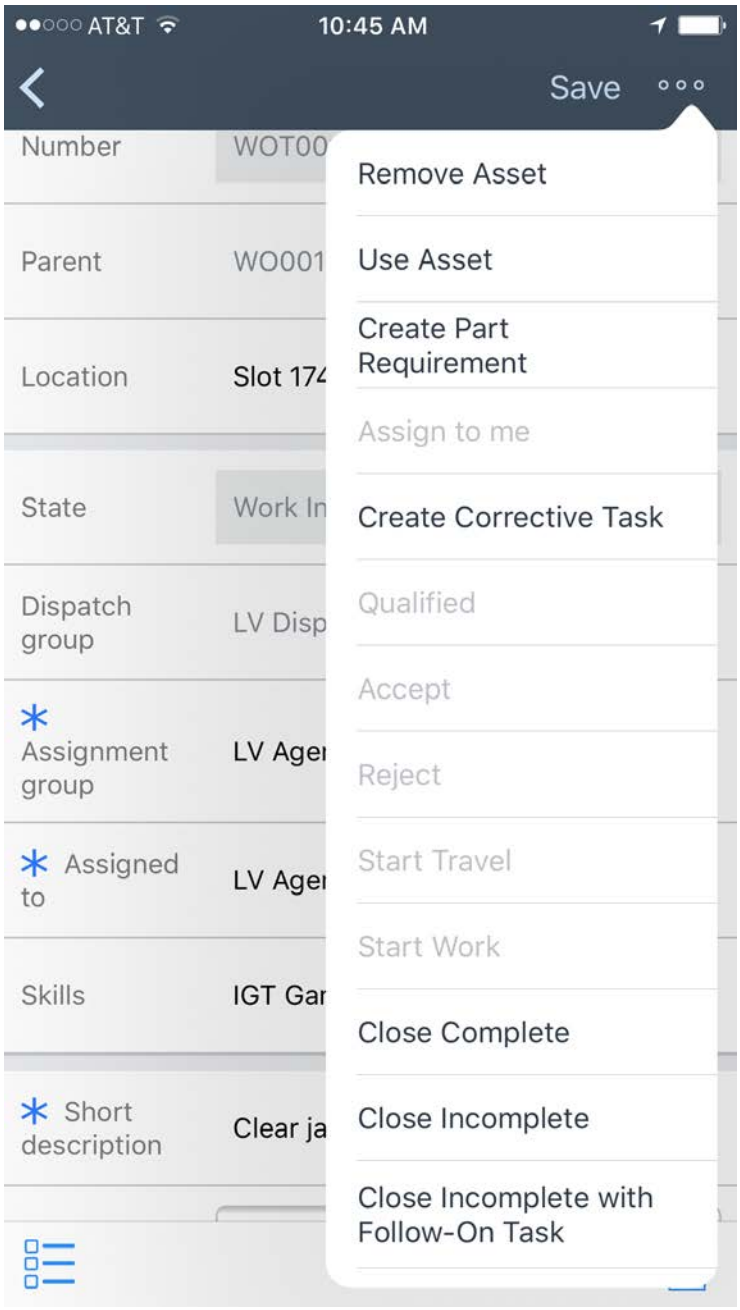
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36. Scroll down and note the Request Type is Corrective and the Initiated From is the parent Work Order Task. Select S**ave**. You will have to hit the back arrow to return to the Work Order Task.



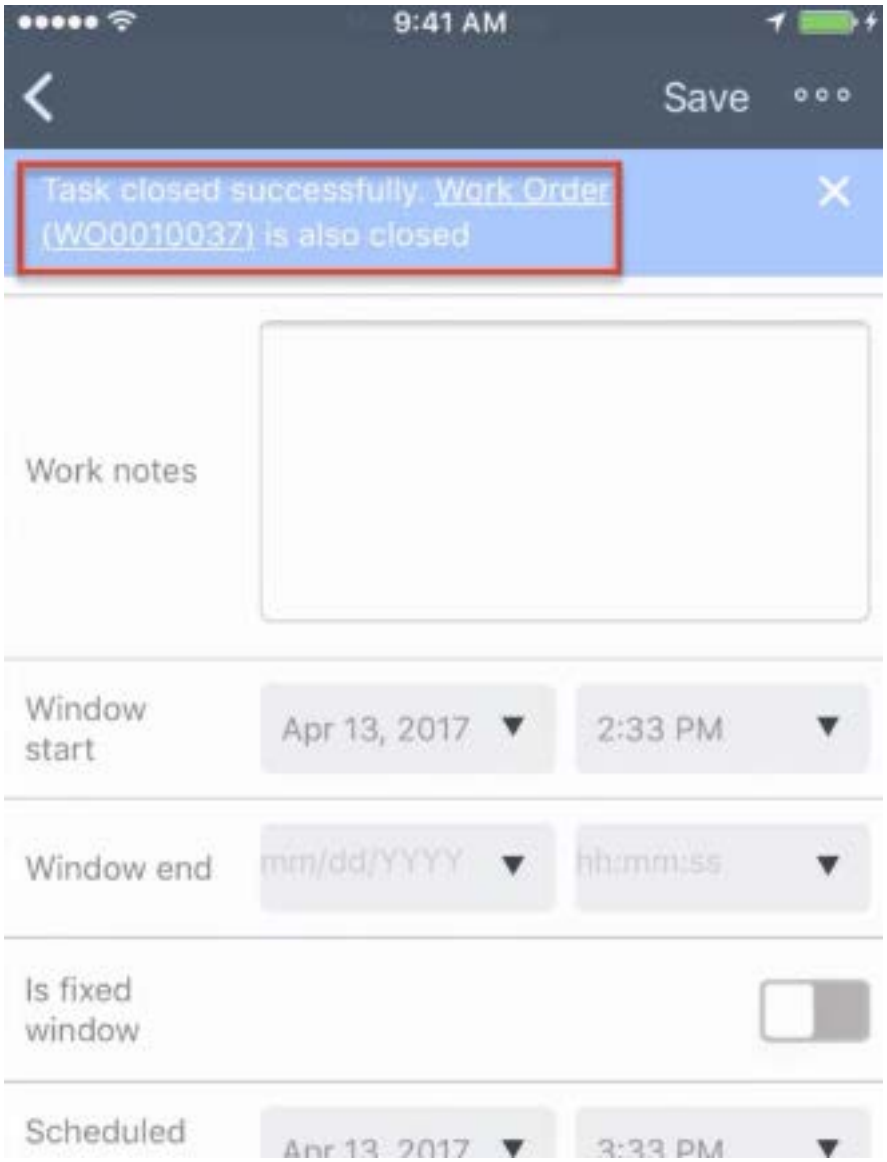
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37. Select **Closed Complete**.



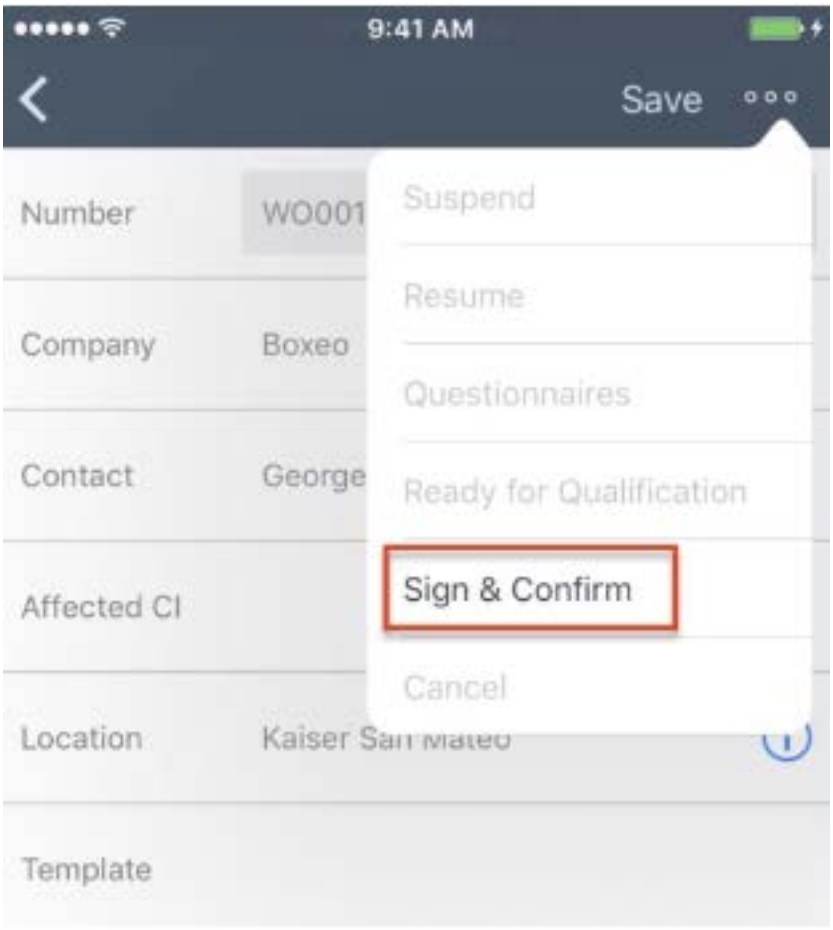
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38. Select the **Work-Order Link** in the alert notifying you that the Work Order has been closed.



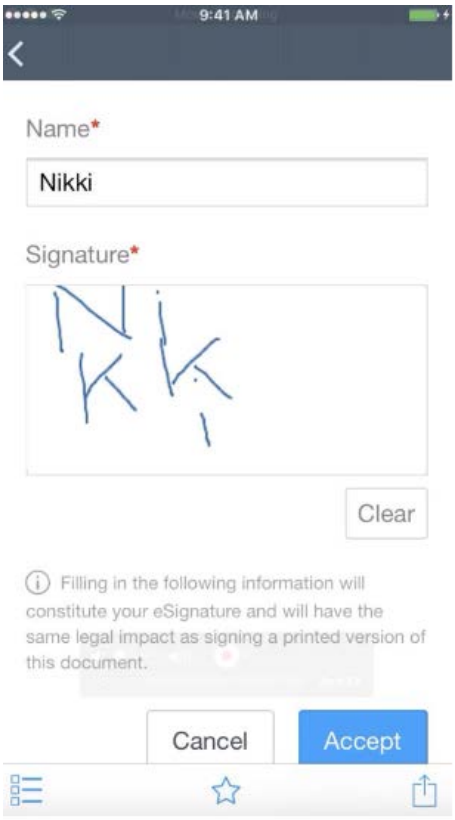
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39. Select **Sign & Confirm** from the dropdown on the Work Order.



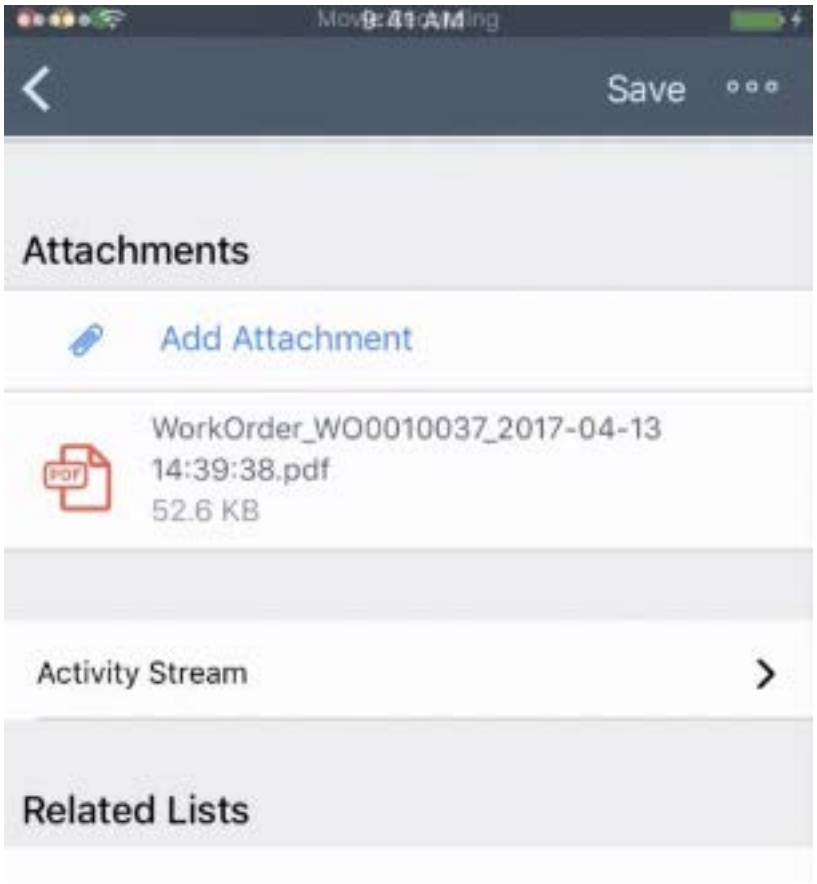
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40. Sign your name, or draw a picture.



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41. Scroll down the work order and view the attachment for PDF summary.



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42. Click on the Work Order PDF that was generated.



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Lab Goal

During this lab, we will cover the aspects of Planned Maintenance, using auto-assignment to task agents with work based on their skill, availability, and proximity to the location of the issue.

Lab 6
Planned Maintenance

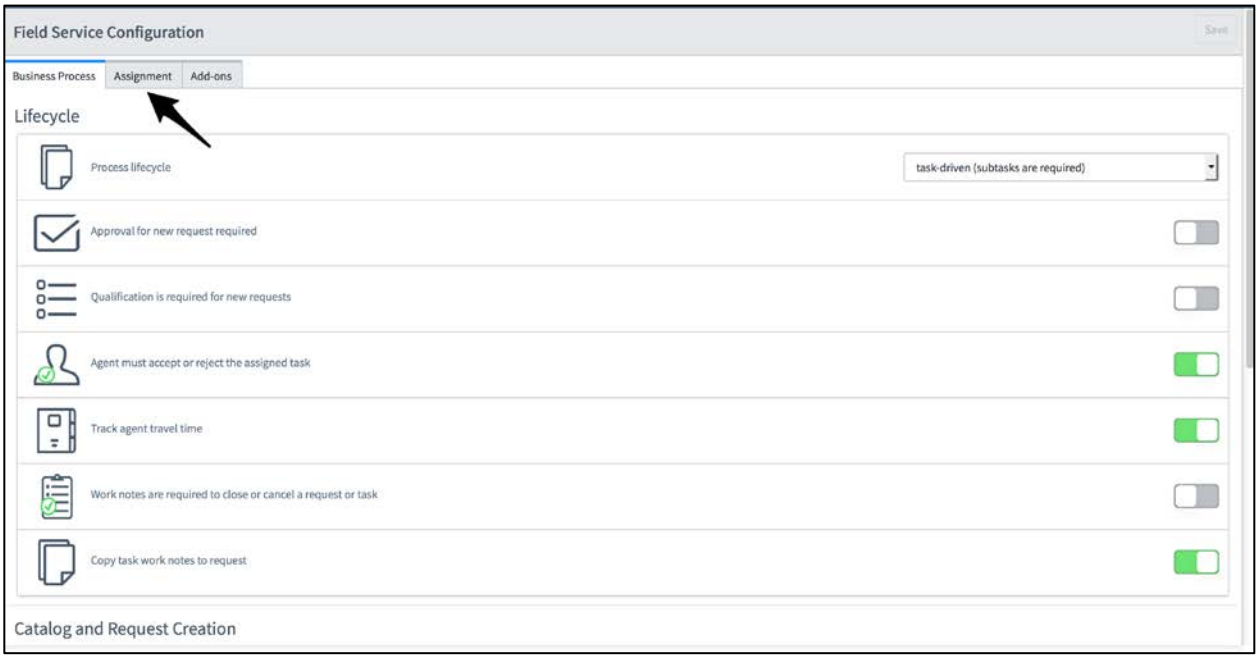
Enable Auto Dispatch

Note: Previously we were using manual dispatch to go through the steps of assigning a work order. If environments where Auto Dispatch is used, most of the steps we took would happen based on assignment rules which may include skills, available stock, and the agent's location.

1. Login or Impersonate the **System Administrator**.
2. Select **Field Service > Administration > Configuration**.

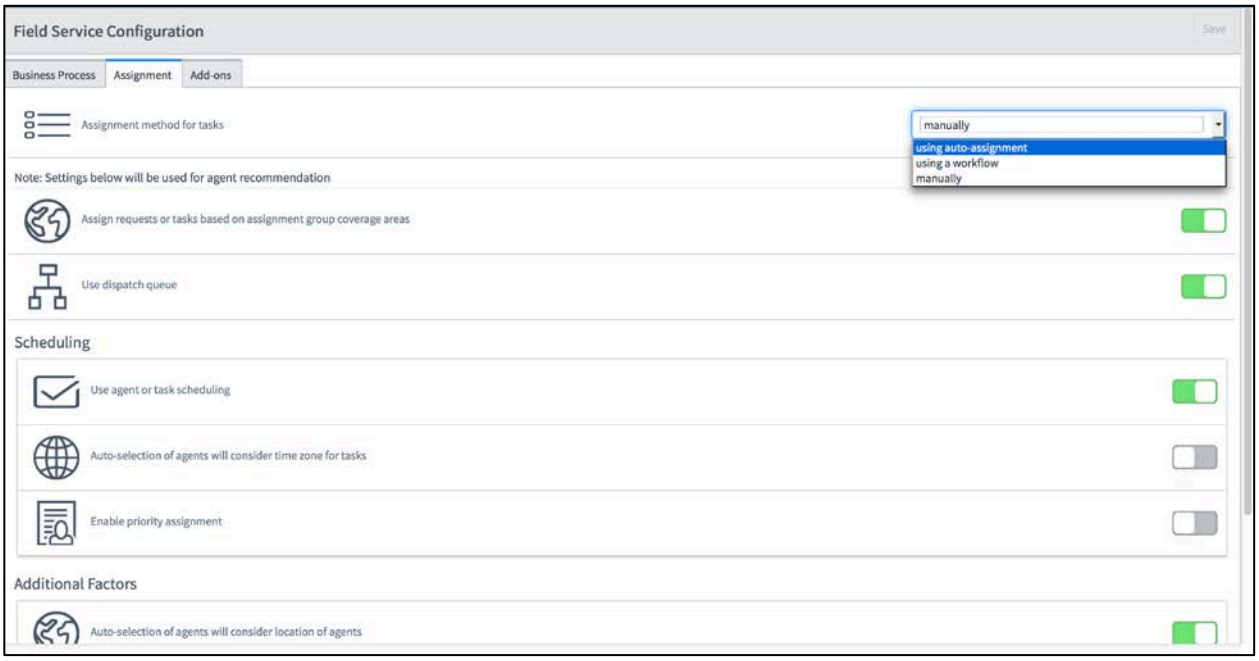
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3. Select the **Assignment** tab.



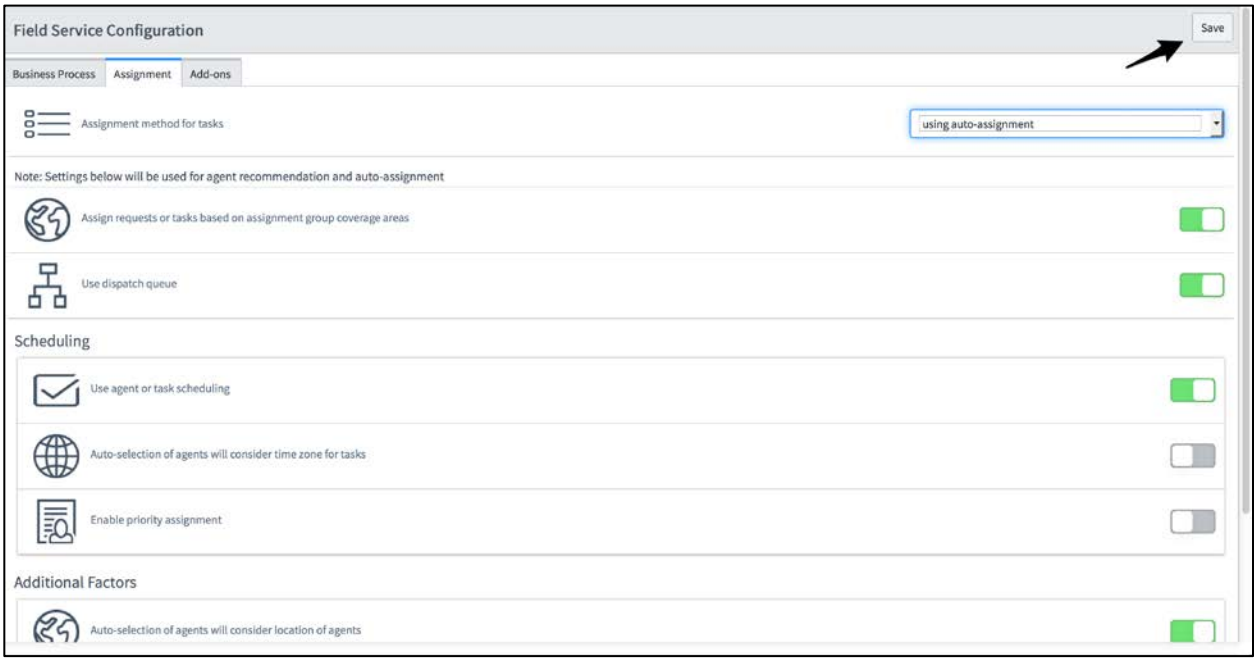
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4. For **Assignment Method for Tasks**, change the selection to **Auto Assignment**. This is a simple way to configure the behavior of (in this case) how the tool handles assignment. Note other options for Assignment like considerations for agent coverage location, agent task scheduling, skills requirements, etc.



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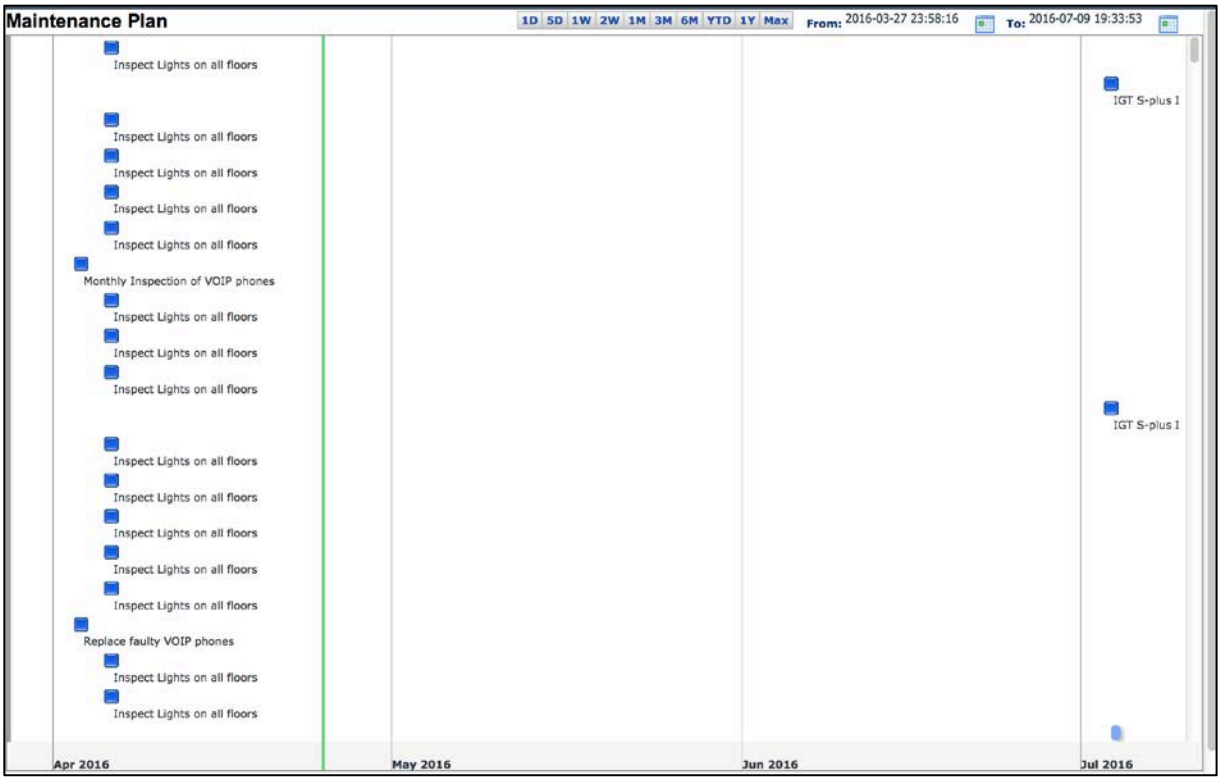
5. Select **Save**.



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Planned Maintenance Overview

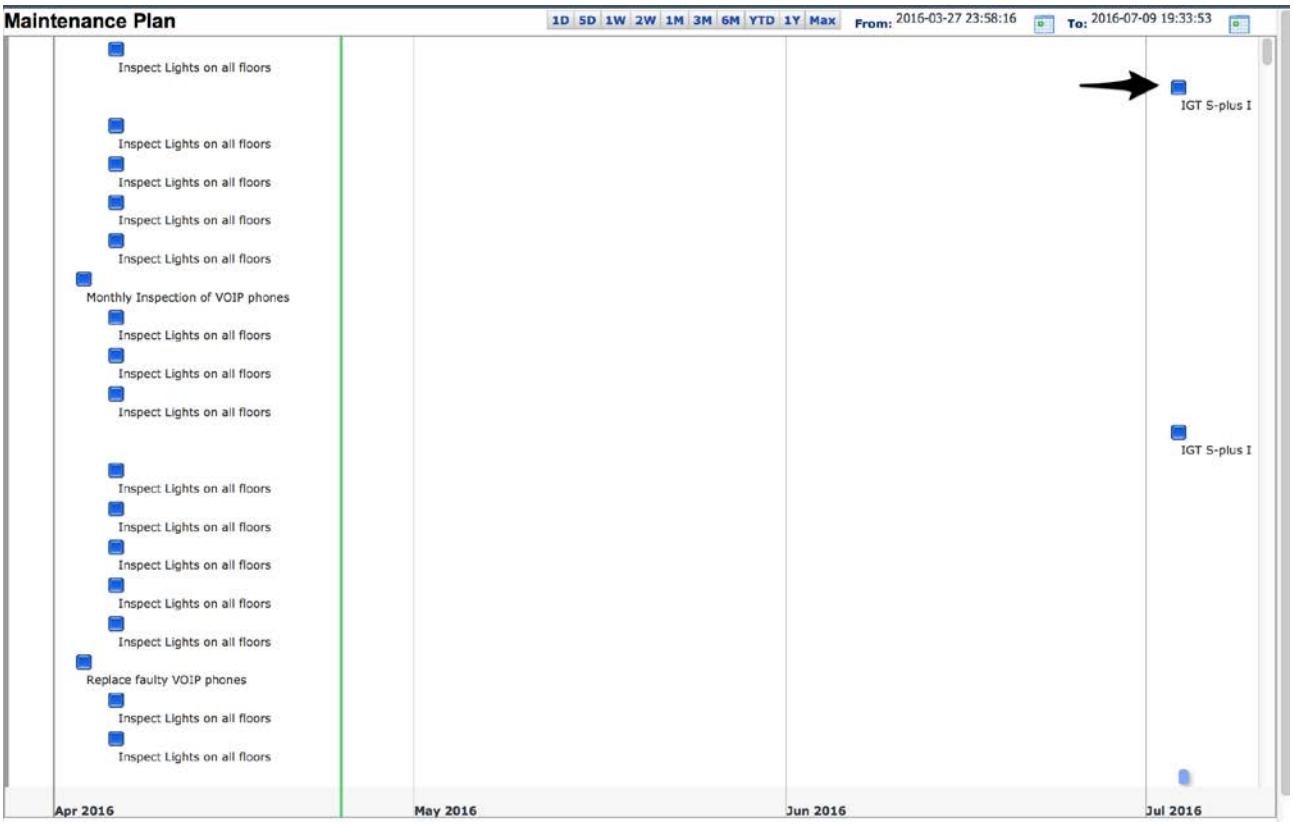
1. Select **Planned Maintenance > Maintenance Calendar**.



2. Review upcoming planned maintenance across all equipment.

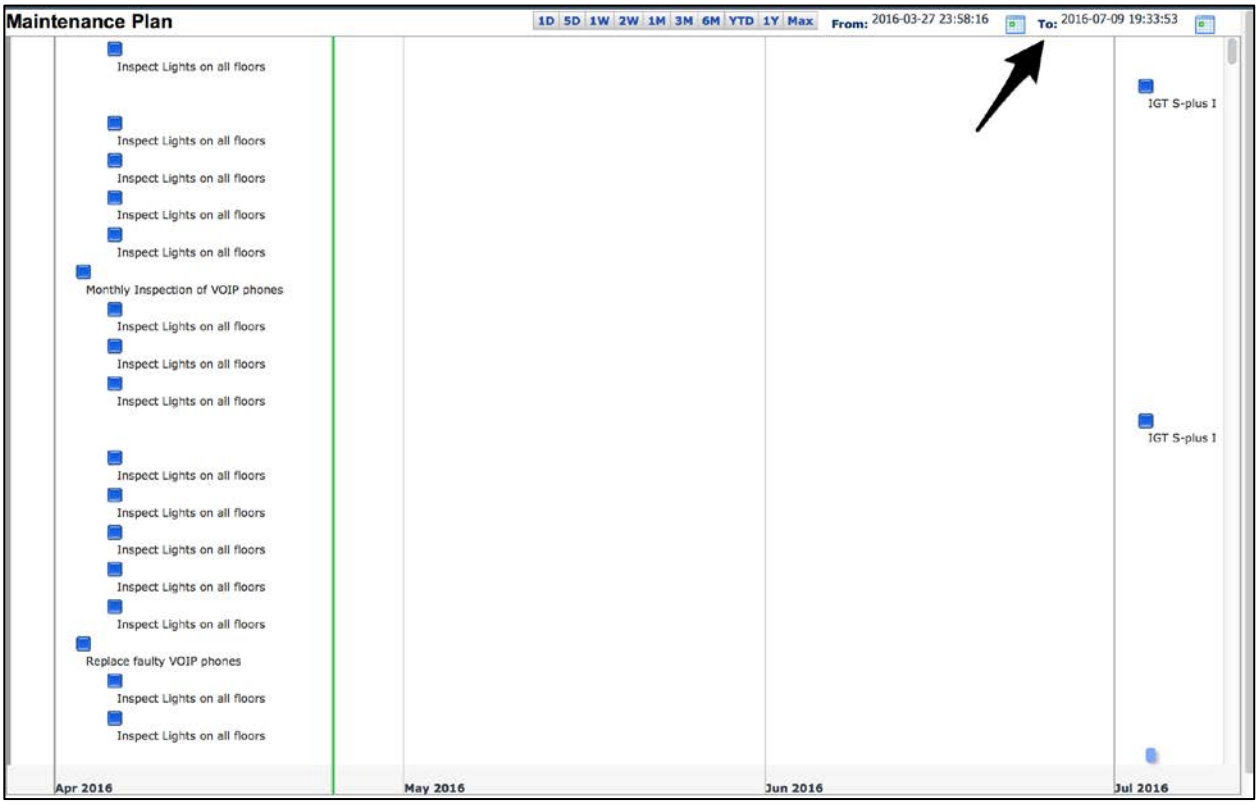
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3. Open a Planned Maintenance record by double clicking the blue dot as shown below.



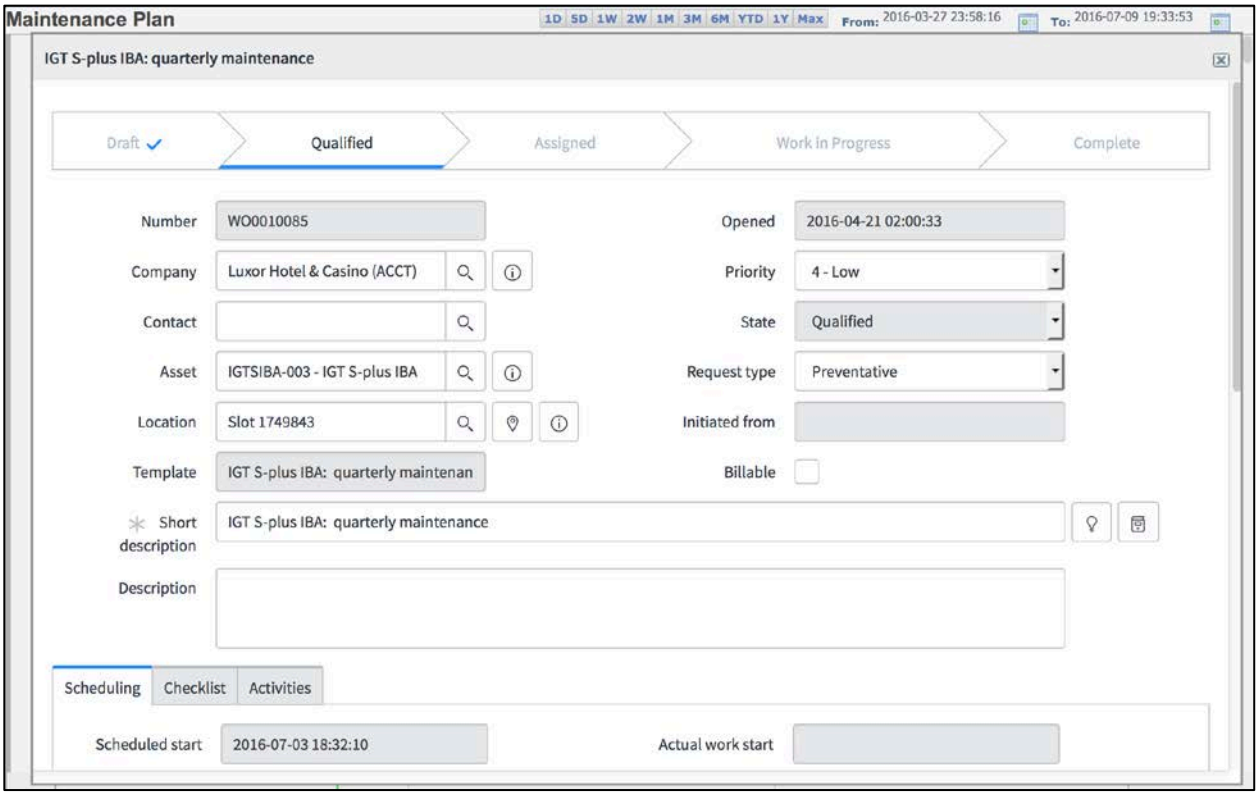
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4. You may need to change the end dates in the section highlighted below.



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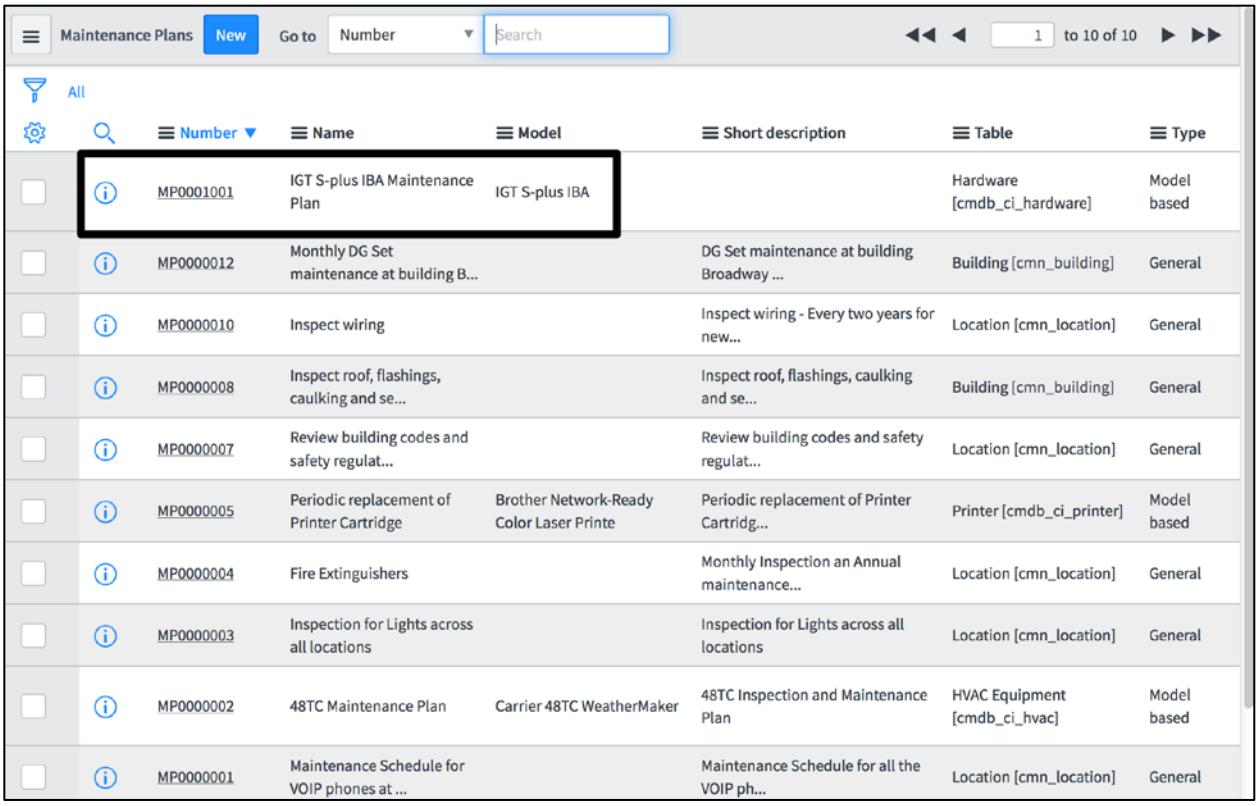
5. Once you open the record you should see something like the screen below. **Note:** The request type is preventative.



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Plan Design

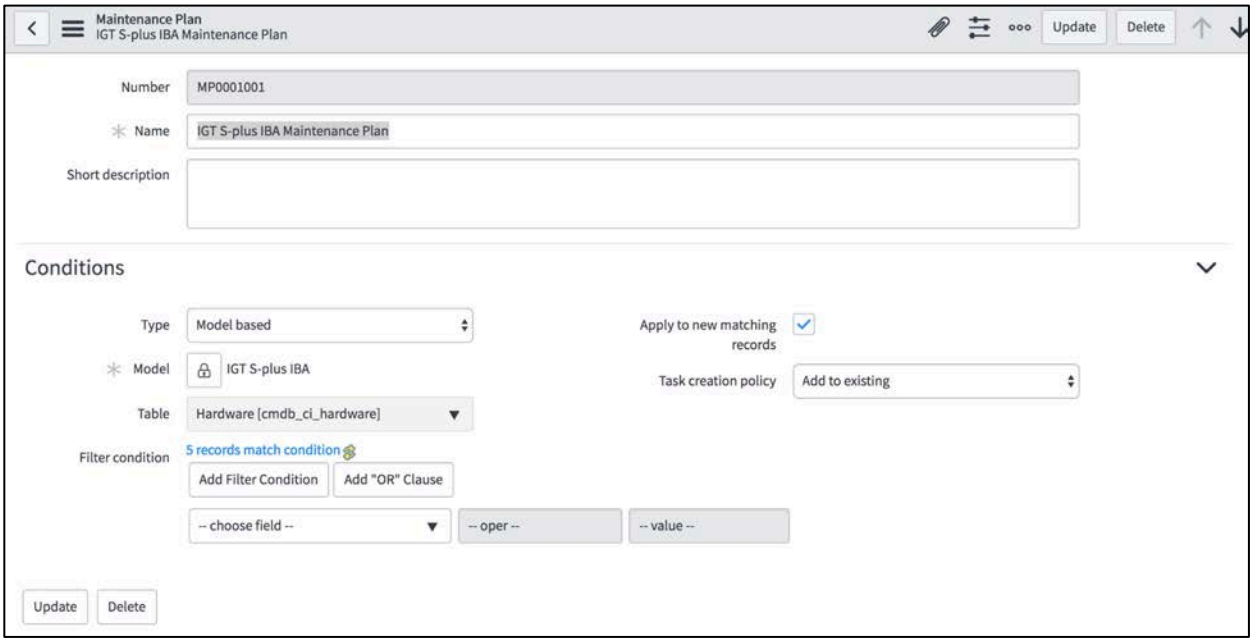
1. Select **Planned Maintenance>Maintenance Plans**.



Number	Name	Model	Short description	Table	Type
MP0001001	IGT S-plus IBA Maintenance Plan	IGT S-plus IBA		Hardware [cmdb_ci_hardware]	Model based
MP0000012	Monthly DG Set maintenance at building B...		DG Set maintenance at building Broadway ...	Building [cmn_building]	General
MP0000010	Inspect wiring		Inspect wiring - Every two years for new...	Location [cmn_location]	General
MP0000008	Inspect roof, flashings, caulking and se...		Inspect roof, flashings, caulking and se...	Building [cmn_building]	General
MP0000007	Review building codes and safety regulat...		Review building codes and safety regulat...	Location [cmn_location]	General
MP0000005	Periodic replacement of Printer Cartridge	Brother Network-Ready Color Laser Printe	Periodic replacement of Printer Cartridg...	Printer [cmdb_ci_printer]	Model based
MP0000004	Fire Extinguishers		Monthly Inspection an Annual maintenance...	Location [cmn_location]	General
MP0000003	Inspection for Lights across all locations		Inspection for Lights across all locations	Location [cmn_location]	General
MP0000002	48TC Maintenance Plan	Carrier 48TC WeatherMaker	48TC Inspection and Maintenance Plan	HVAC Equipment [cmdb_ci_hvac]	Model based
MP0000001	Maintenance Schedule for VOIP phones at ...		Maintenance Schedule for all the VOIP ph...	Location [cmn_location]	General

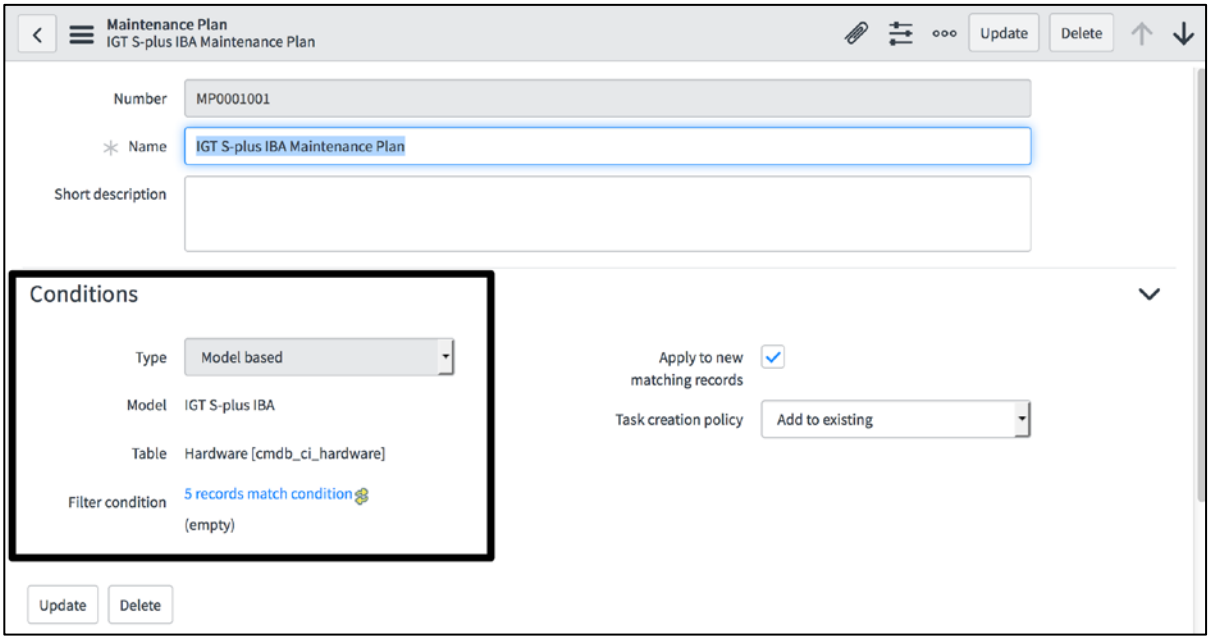
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2. Open the plan titled **IGT S-plus IBA Maintenance Plan**, highlighted in above list.



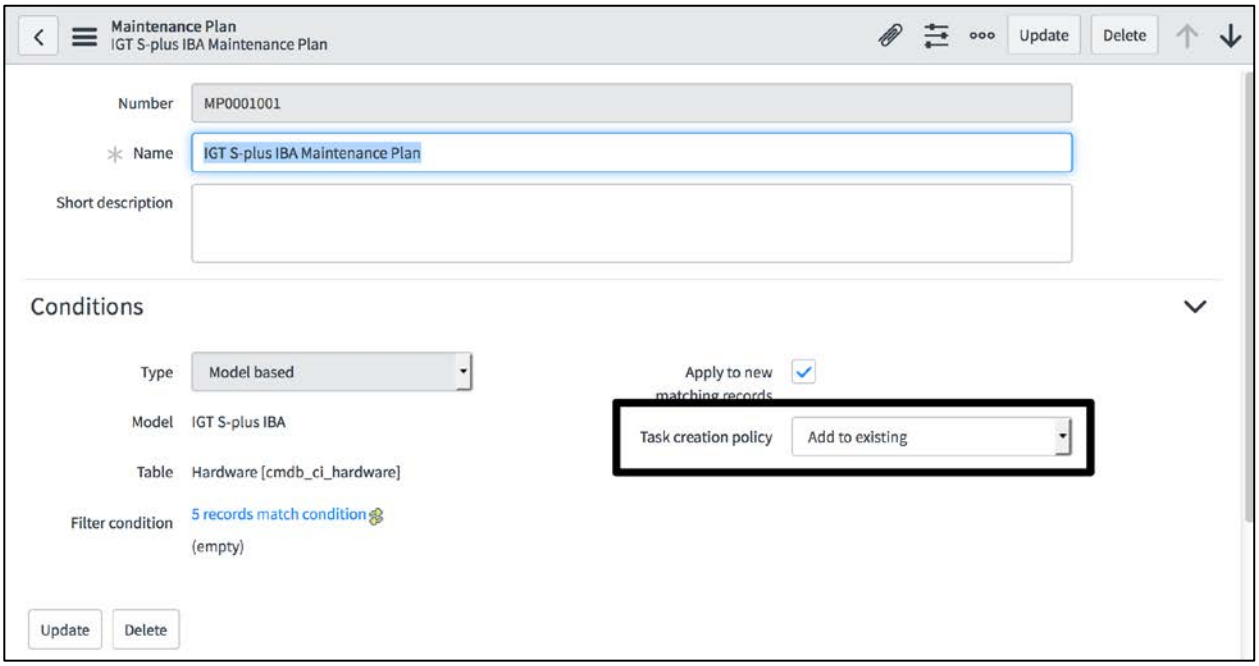
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3. In the **Conditions** section, you'll notice the **Type** is **Model based**. This means that the maintenance plan will be related at the Asset Model level. Also, note that the model captured filters down to 5 specific asset records that match that model (e.g., only assets that are in production should be maintained). Additional filtering can be applied, but we'll work with this as it is.



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4. Note that the Task creation policy is **Add to existing**. This defines the behavior of the tool if it encounters another set of planned maintenance activities on the same asset model. Drop down and view options, but leave as is.

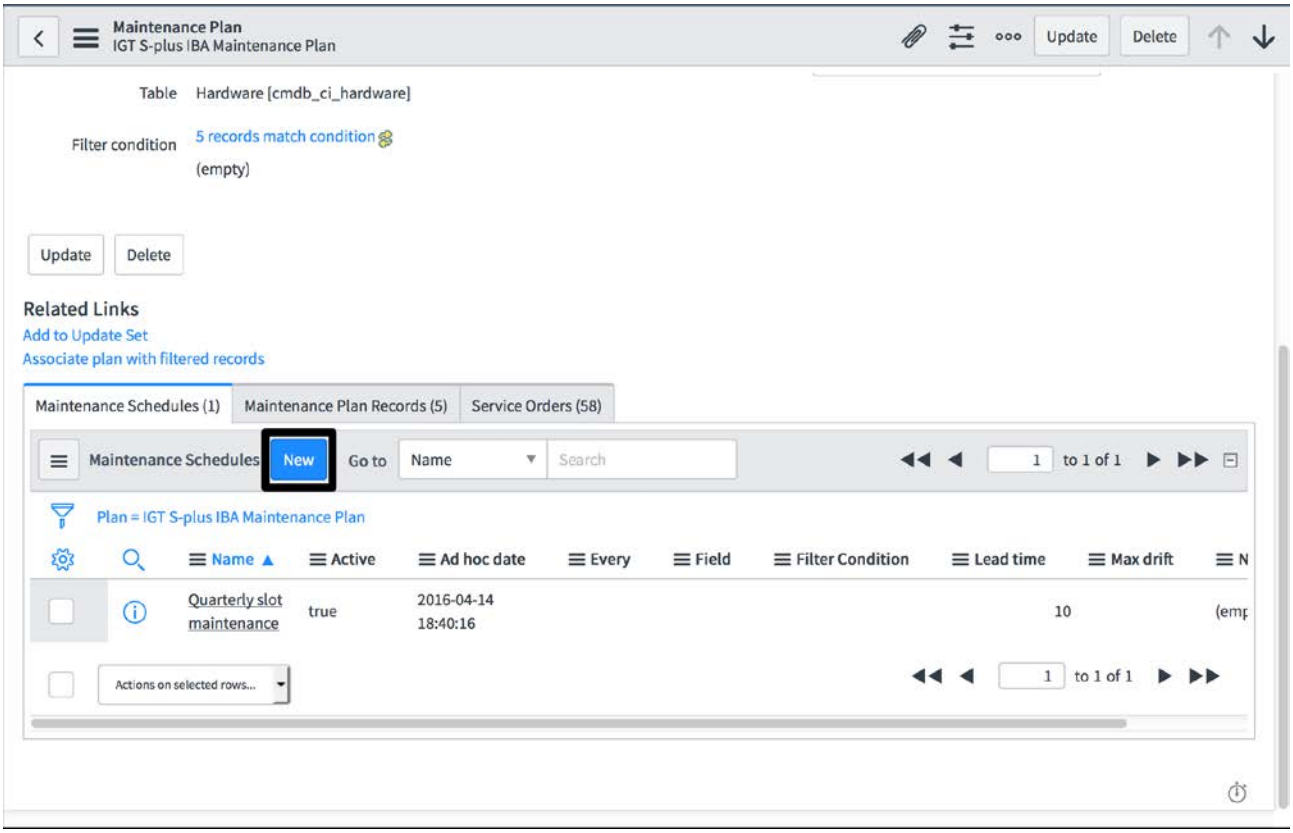


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Schedules and Templates

1. Scroll down until you see the **Maintenance Schedules** related list.

2. Select **New.**

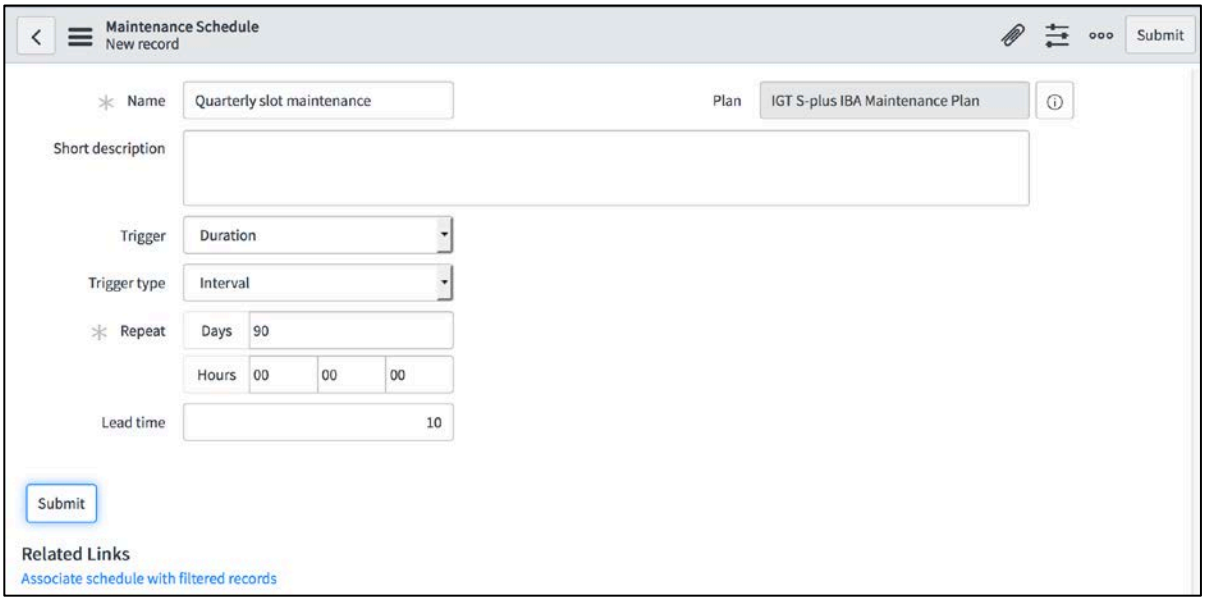


3. A New Maintenance Schedule record will open.

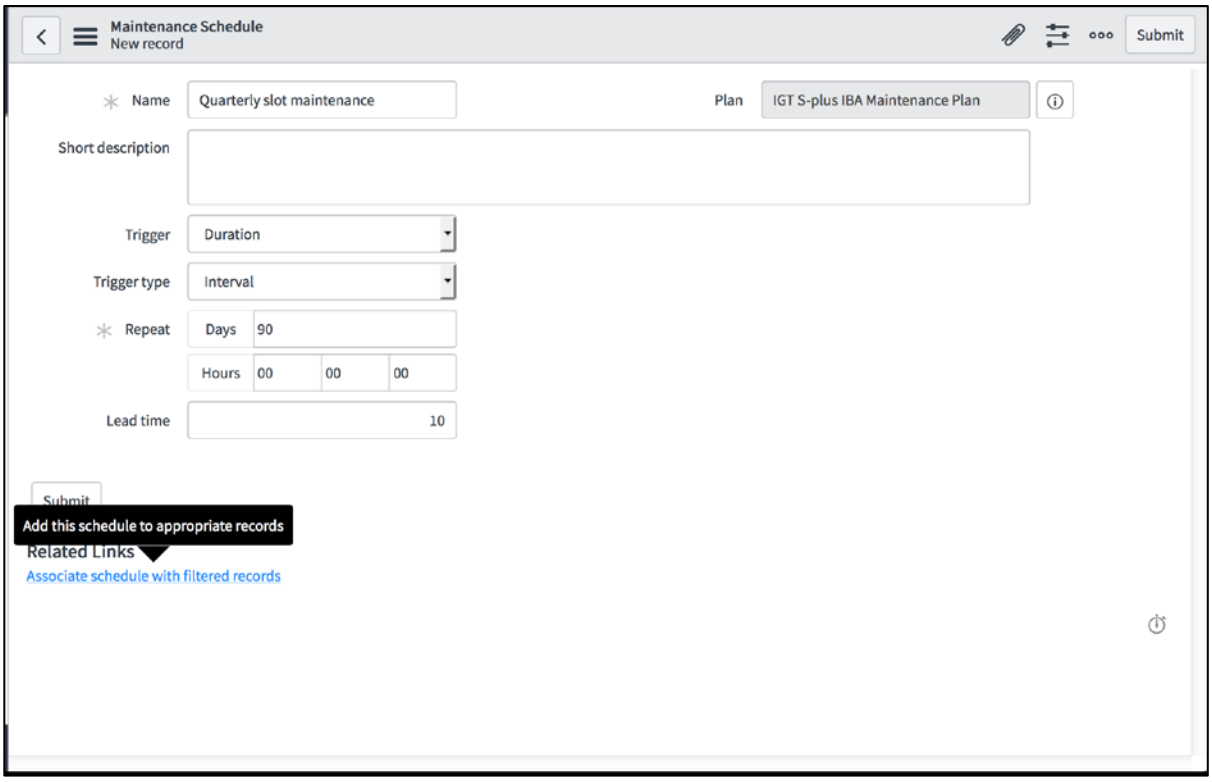
4. Fill out as follows:

   - Name: Quarterly slot maintenance
   - Trigger: Duration - Note: This can also be meter or conditional, to account for other systems that may feed information into ServiceNow (ex: monitoring system that tracks optimal temperature range for operation).
   - Trigger type: Interval
   - Repeat > Days: 90
   - Lead time: 10 - Note: Lead time simply defines how many days in advance of the due date should the work be issued to a field technician.

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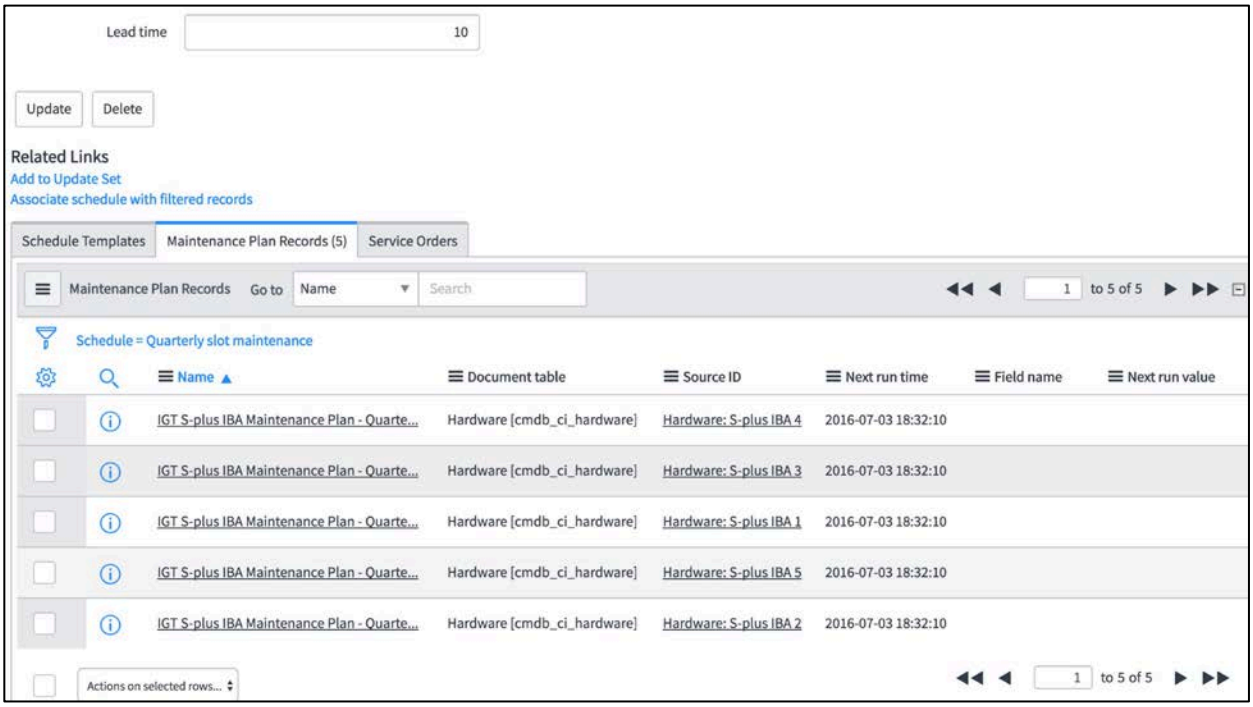


5. Select '**Associate schedule with filter records'**. This will apply the schedule to the 5 slot machines of the model chosen.



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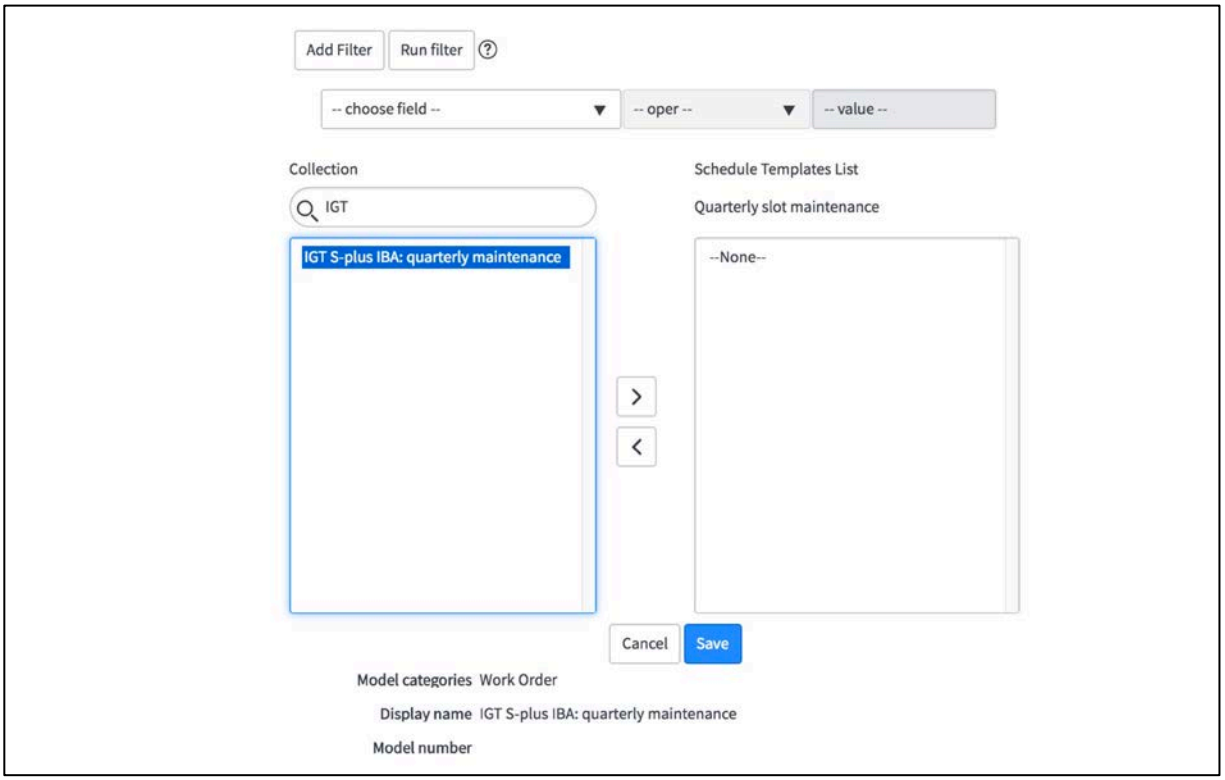
6. Note the newly created Maintenance Plan Records in the related list.



7. Under Schedule Templates, click **Edit** to associate an existing template to the schedule (search and add **IGT S-plus IBA: quarterly maintenance**) .

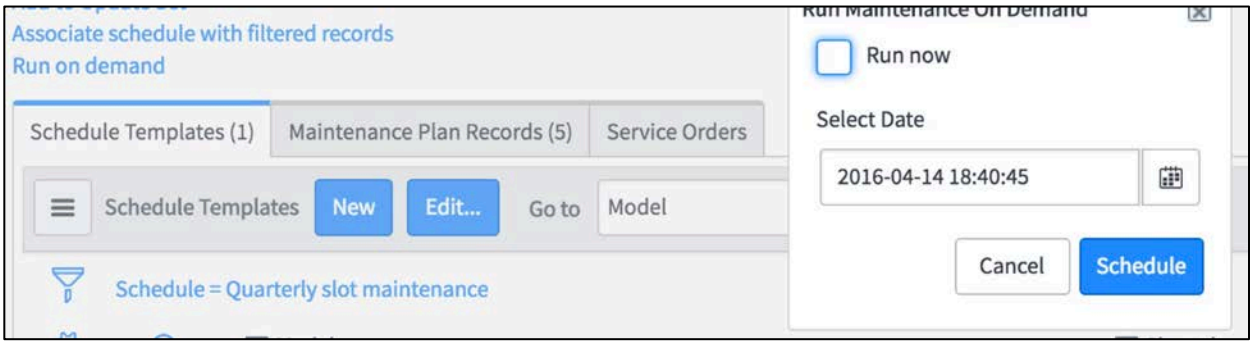
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8. Once you've selected the template, click **Save.**



On-Demand Execution

1. Click **Run on demand** under the Related Links. This allows maintenance manager to run ad-hoc maintenance on assets regardless of their associated schedule. This can be now or on a specified date. Uncheck Run now to see for yourself.



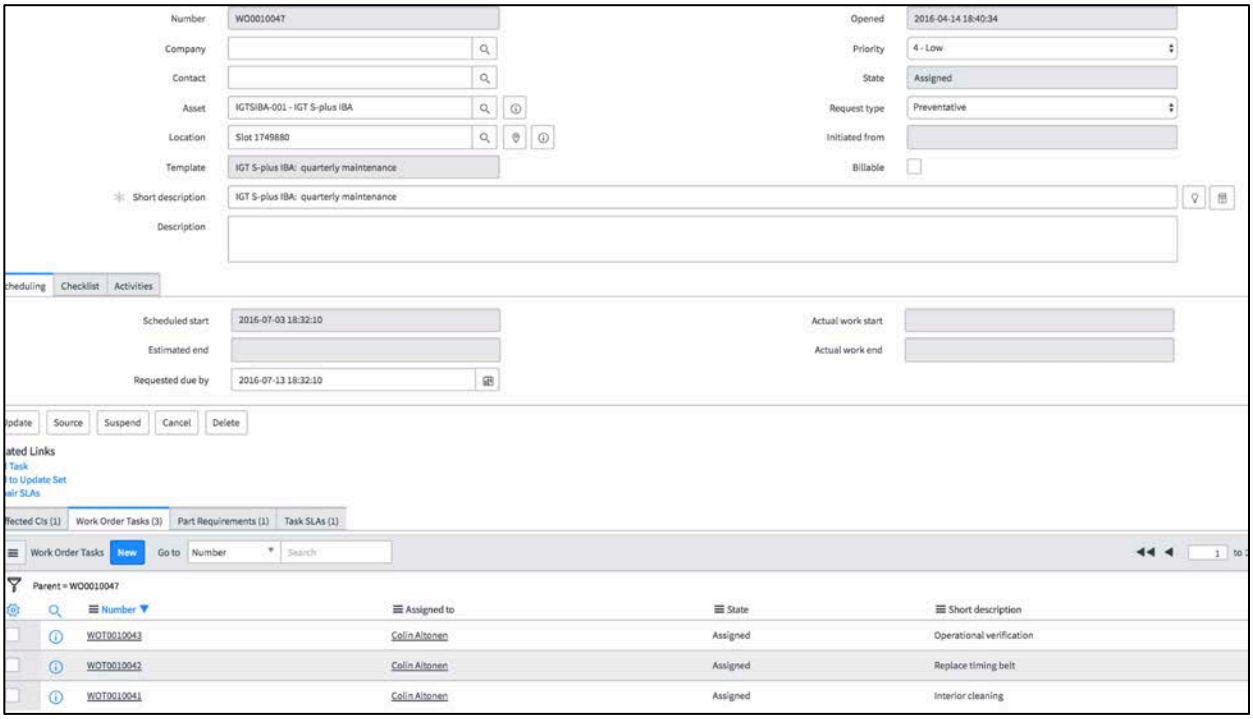
2. Check **Run now** and click **Schedule**.

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3. Note that 5 Service Orders were now created under the Service Order related list. Also note that this takes time, as the auto-assignment runs algorithms to decide who to assign work to. Neat, huh?

4. Drill into one of the work orders created and note the following:

   - A planned maintenance Template was applied for quarterly maintenance
   - All 3 work order tasks (related list) were auto-assigned to the same agent as they had availability, skills, and location coverage to do the work
   - A part requirement (related list) was also generated to send a part out with the assigned technician



We would like to thank you for attending this lab and hope that you found it informative.

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