knowledge14

April 27–May 1, 2014 • Moscone Center • San Francisco, CA

Lab Guide

Work Management:

Power Mobile Worker Productivity with Geolocation

Ben Hollifield & Melissa Moghaddam

Lab instance: https://**<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

Running K14 requires a lot of effort. The right equipment needs to be in the right place at the right time, or else! This year, Fred's Google Glass eyepiece is malfunctioning, and we need to dispatch a tech to repair it ASAP. First, let's setup ServiceNow with a new Work Order Model.

Lab 1
Create a Work Order Model

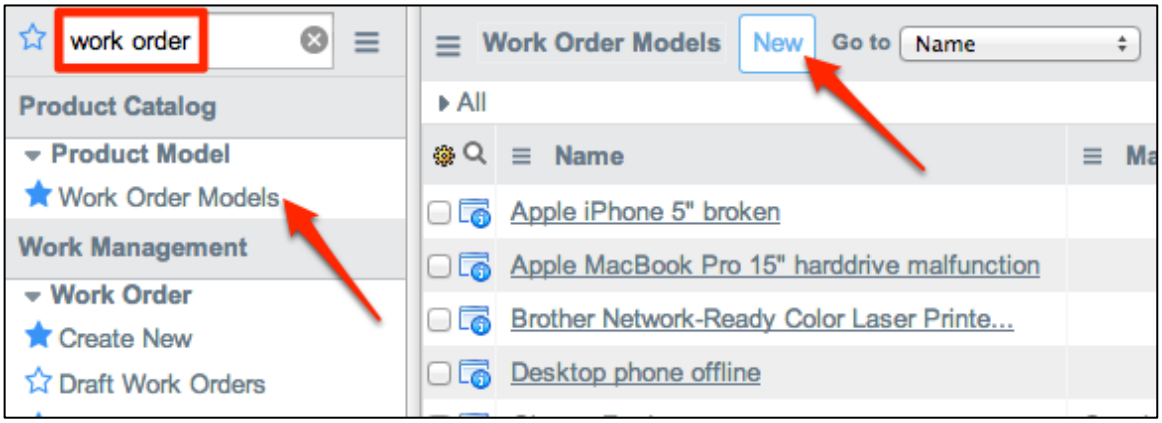
Log on to Your Lab Instance.

1. Your instructor will provide you with your own instance URL.

2. Log into your instance using the username **admin** and the password **Knowledge14**.

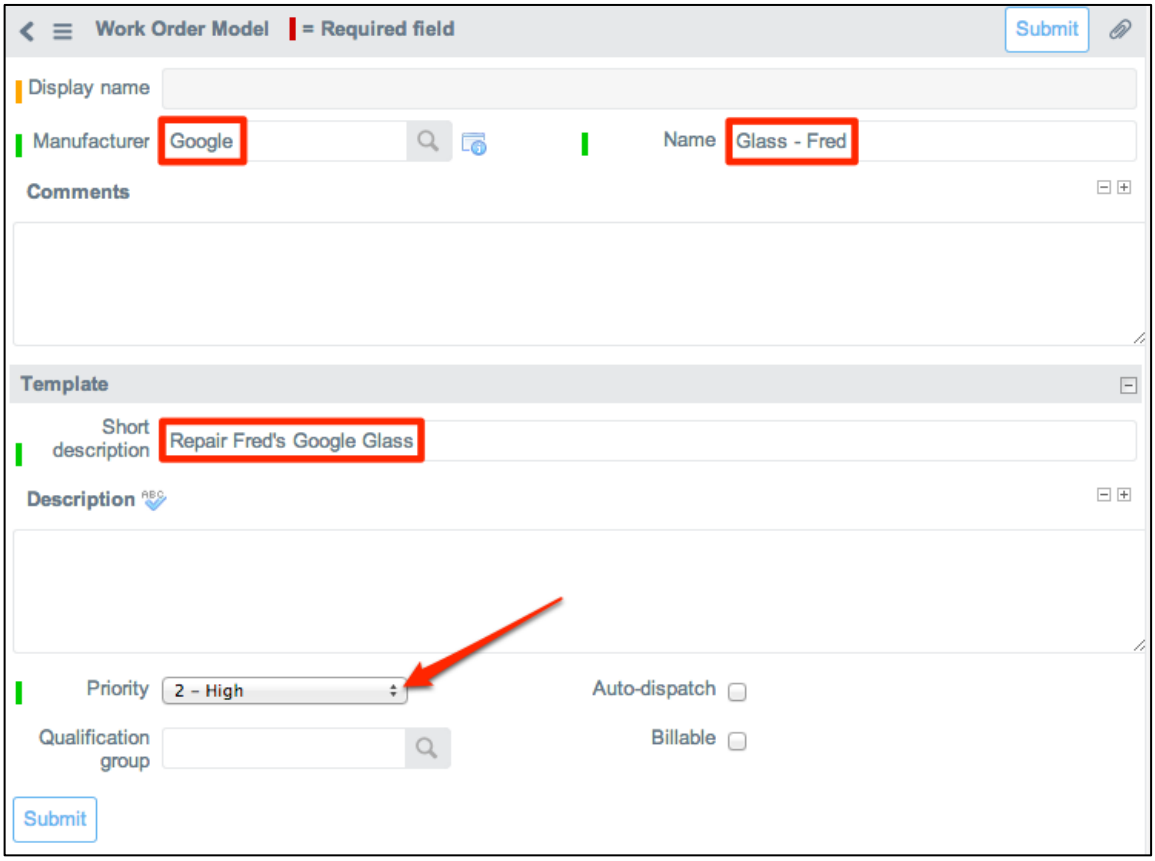
Create a New Work Order Model

1. Fred frequently breaks his Google Glass, so we're going to setup a work order model – this will simplify similar requests in the future. Navigate to **Product Catalog > Work Order Models** and click **New**.



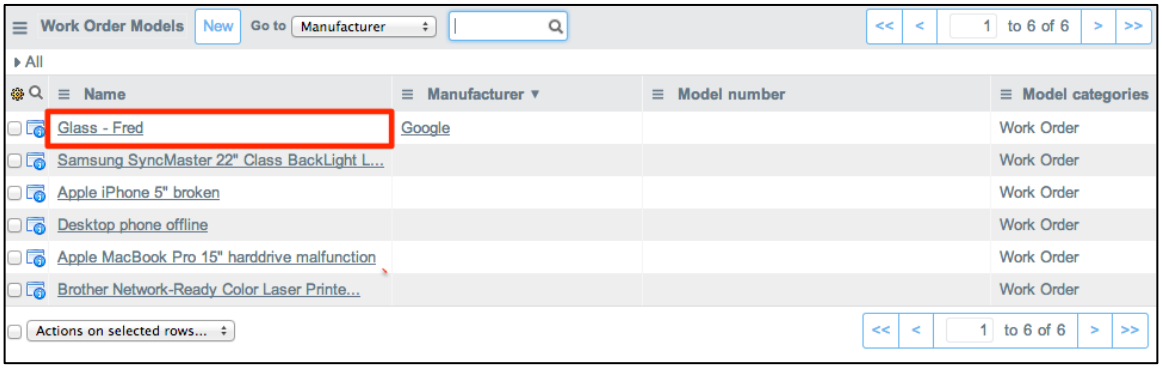
®2014 ServiceNow, Inc. All rights reserved.

2. Fill out the Work Order Model form as shown below and click **Submit**.

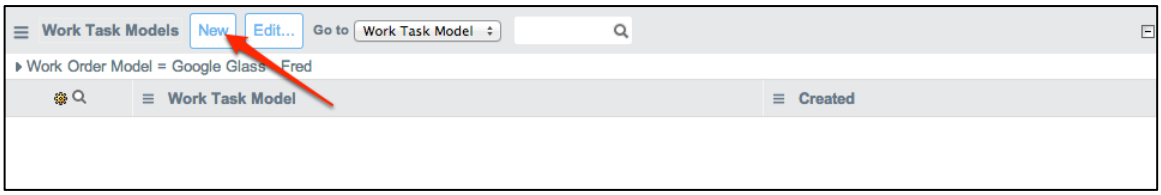


©2014 ServiceNow, Inc. All rights reserved.

3. After clicking **Submit**, you should see your new model listed. Click to open it.



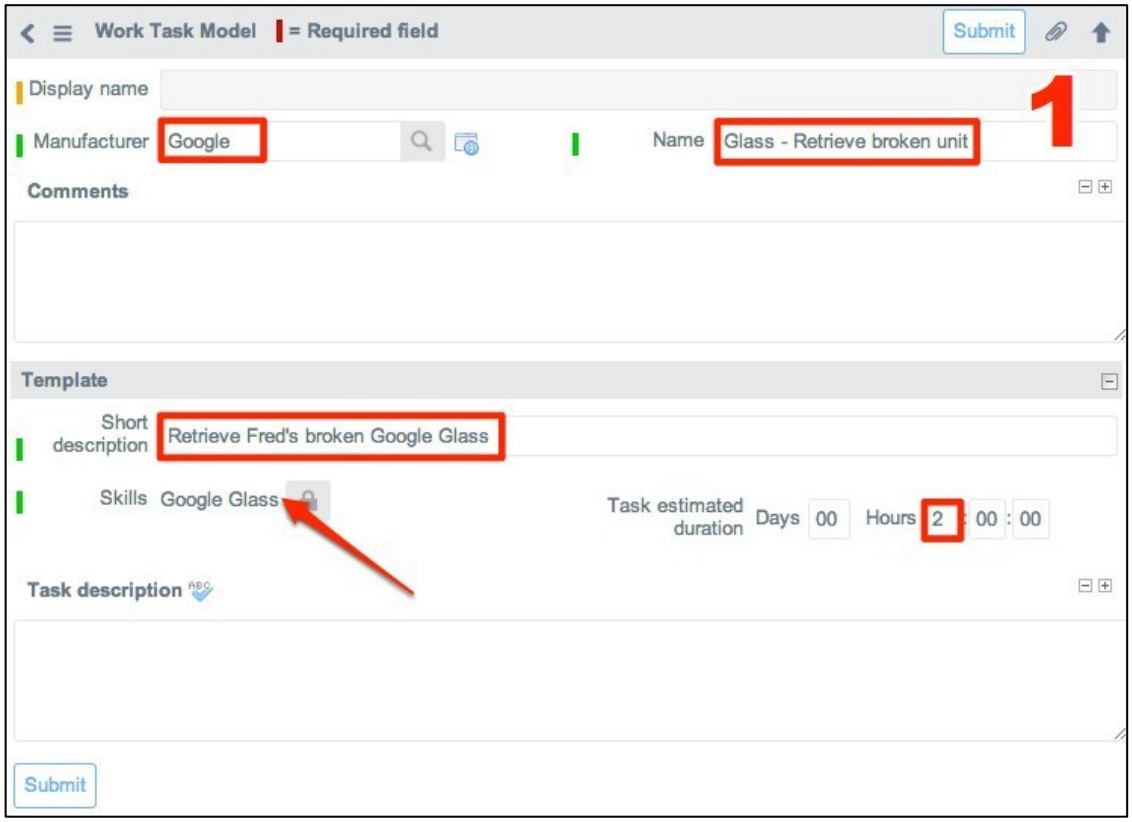
4. Scroll to the **Work Task Models** related list at the bottom of the form and click **New**.



®2014 ServiceNow, Inc. All rights reserved.

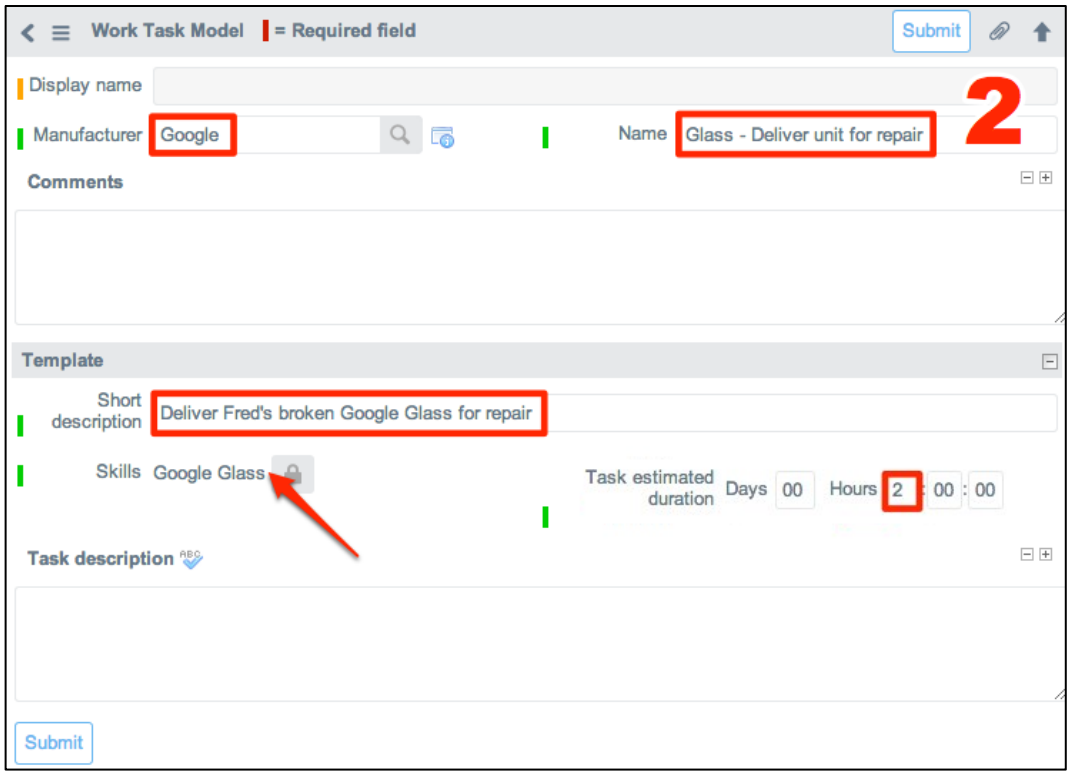
Now, we need to add some tasks to this work order model. These tasks represent the work needed to fulfill the work order. Because Fred breaks his glasses so often, we know exactly what needs to be done. Create the following 3 tasks.

Step 1: Retrieve the broken Google Glass unit from Fred:



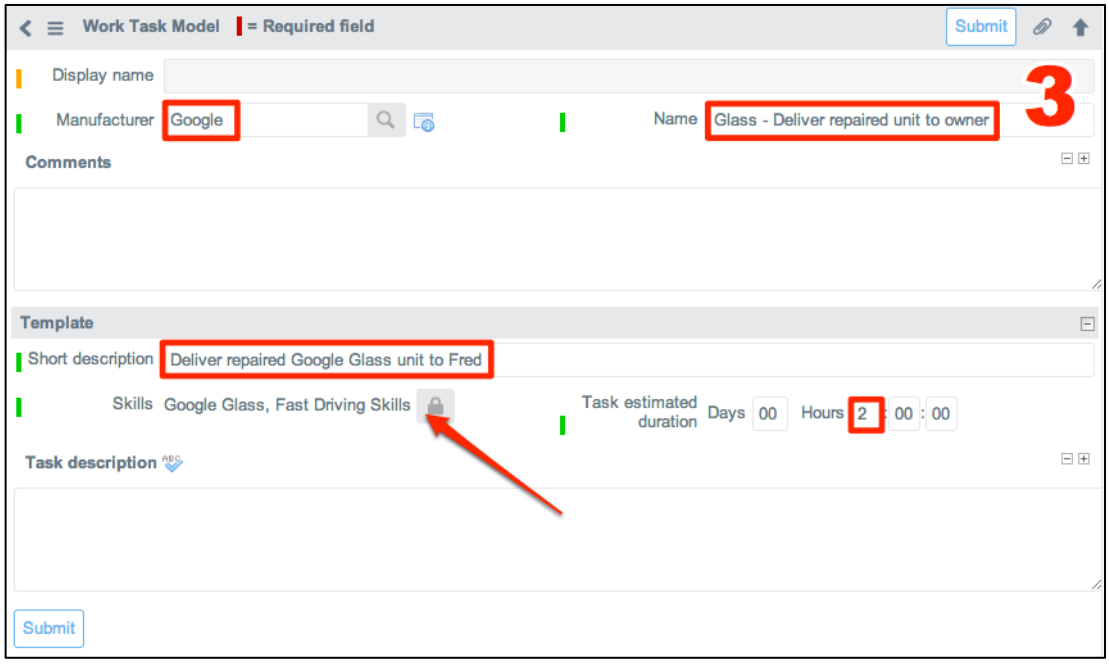
©2014 ServiceNow, Inc. All rights reserved.

Step 2: Deliver the broken unit to Google's top-secret barge in the San Francisco Bay for repairs:



©2014 ServiceNow, Inc. All rights reserved.

Step 3: Deliver the repaired Google Glass unit to Fred:



Bonus: For the return trip, we want to store the Google Glass in a padded case to ensure safe delivery. For this, we'll add a Part Requirement for the **Google Special Padded Case**.

1. At the bottom of the **Work Order Model** form, re-open the 3rd **Work Task Model** we just created.

2. At the bottom of the **Work Task Model** form, select the **New** button on the **Part Requirements** related list.

3. For the **Model**, select **Google Special Padded Case** with a quantity of **1**. Click **Submit**.



©2014 ServiceNow, Inc. All rights reserved.

Lab Goal

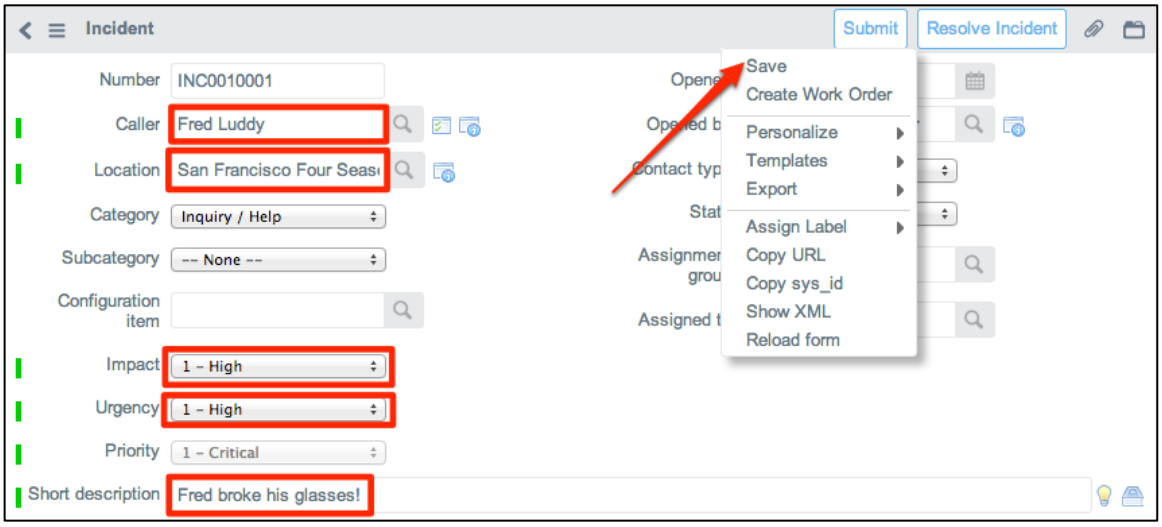
Fred just called in to the Service Desk, and he's broken his Google Glass again. We need to create a Work Order to have it repaired in time for his keynote presentation at Knowledge14!

Lab 2
Create a Work Order

Create a New Incident

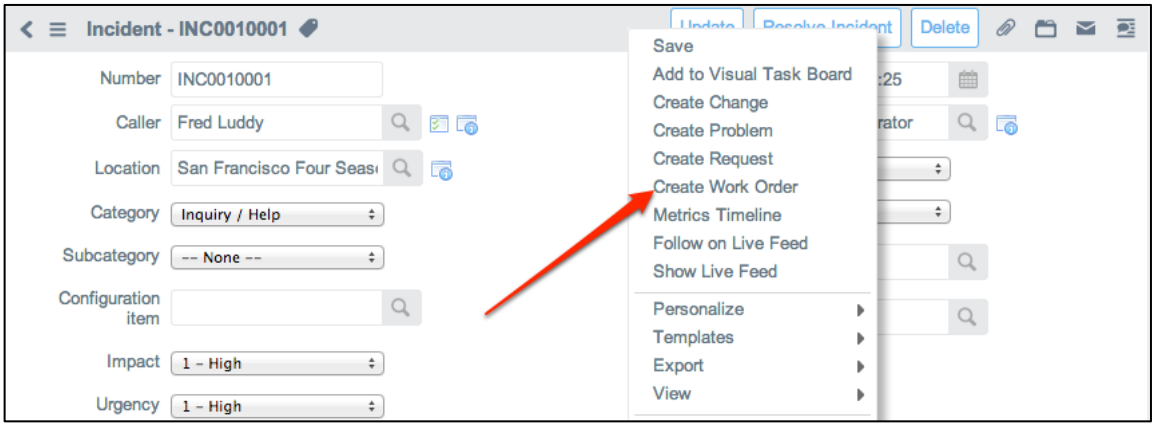
1. Navigate to **Incident > Create New**.

2. Complete the Incident form as shown below. When completed, right click the form header and click **Save**. Don't forget to change Fred's location – he's staying at the San Francisco Four Seasons!



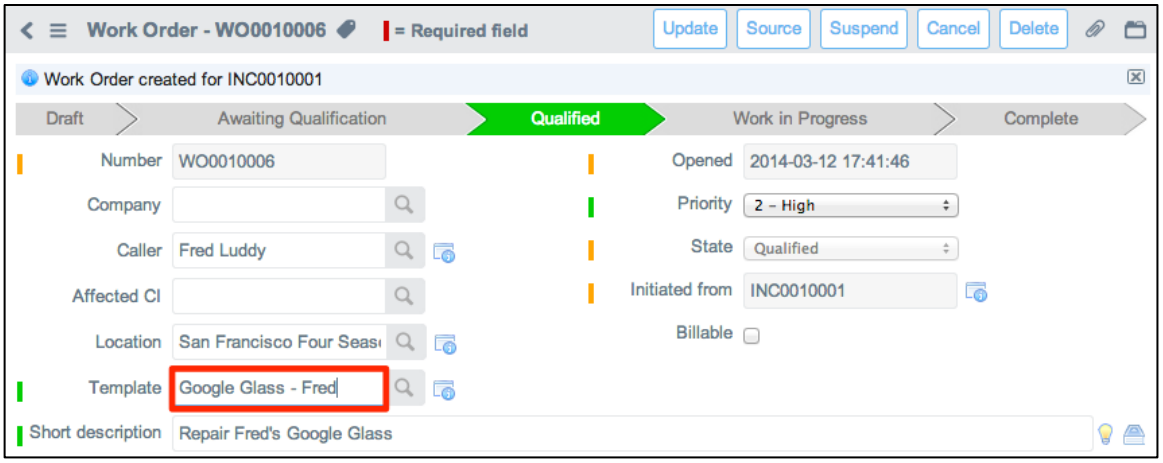
©2014 ServiceNow, Inc. All rights reserved.

3. After the form reloads, again right-click the form header and click **Create a Work Order**.



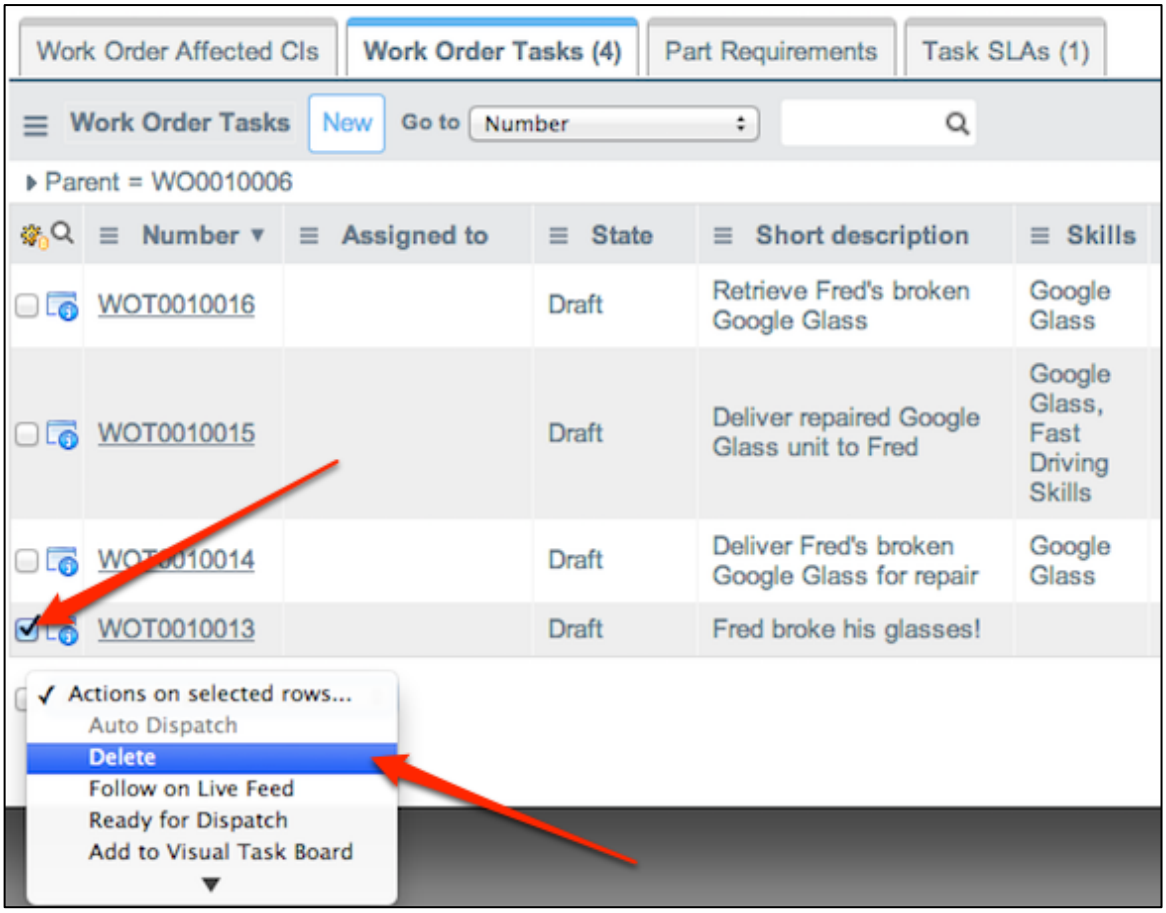
Create a New Work Order

1. After completing the step above, you should be redirected to a new **Work Order**. By default, we have a generic Work Order with a single Work Order Task. However, in this case, we want to use our newly created Work Order template. Enter **Google Glass – Fred** in the **Template** field, as shown below. Right-click the form header and click **Save**.



©2014 ServiceNow, Inc. All rights reserved.

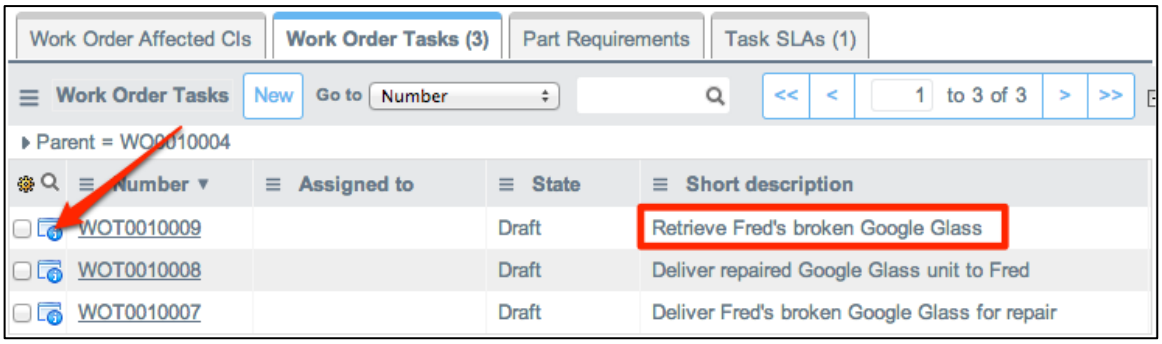
2. After our template is applied, you should notice 4 Work Order Tasks in the related list at bottom. 3 of those are the result of our Work Order template, but the 4th is the default Work Order Task that was created with the generic Work Order - Delete it.



©2014 ServiceNow, Inc. All rights reserved.

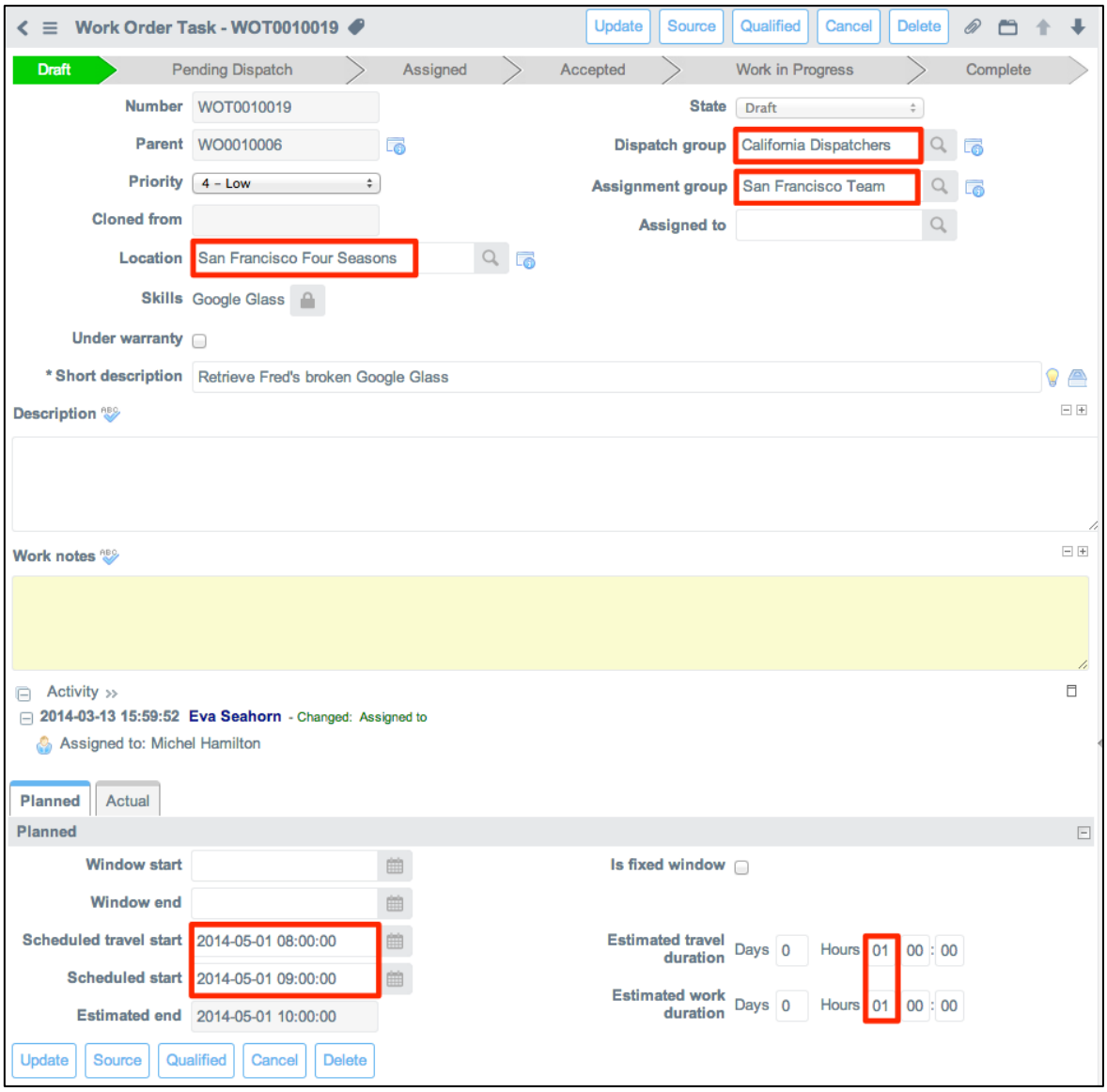
Add Detail to Work Order Tasks

1. We need to add some detail to the tasks for this particular Work Order, so click on the task, **Retrieve Fred's Broken Google Glass**.



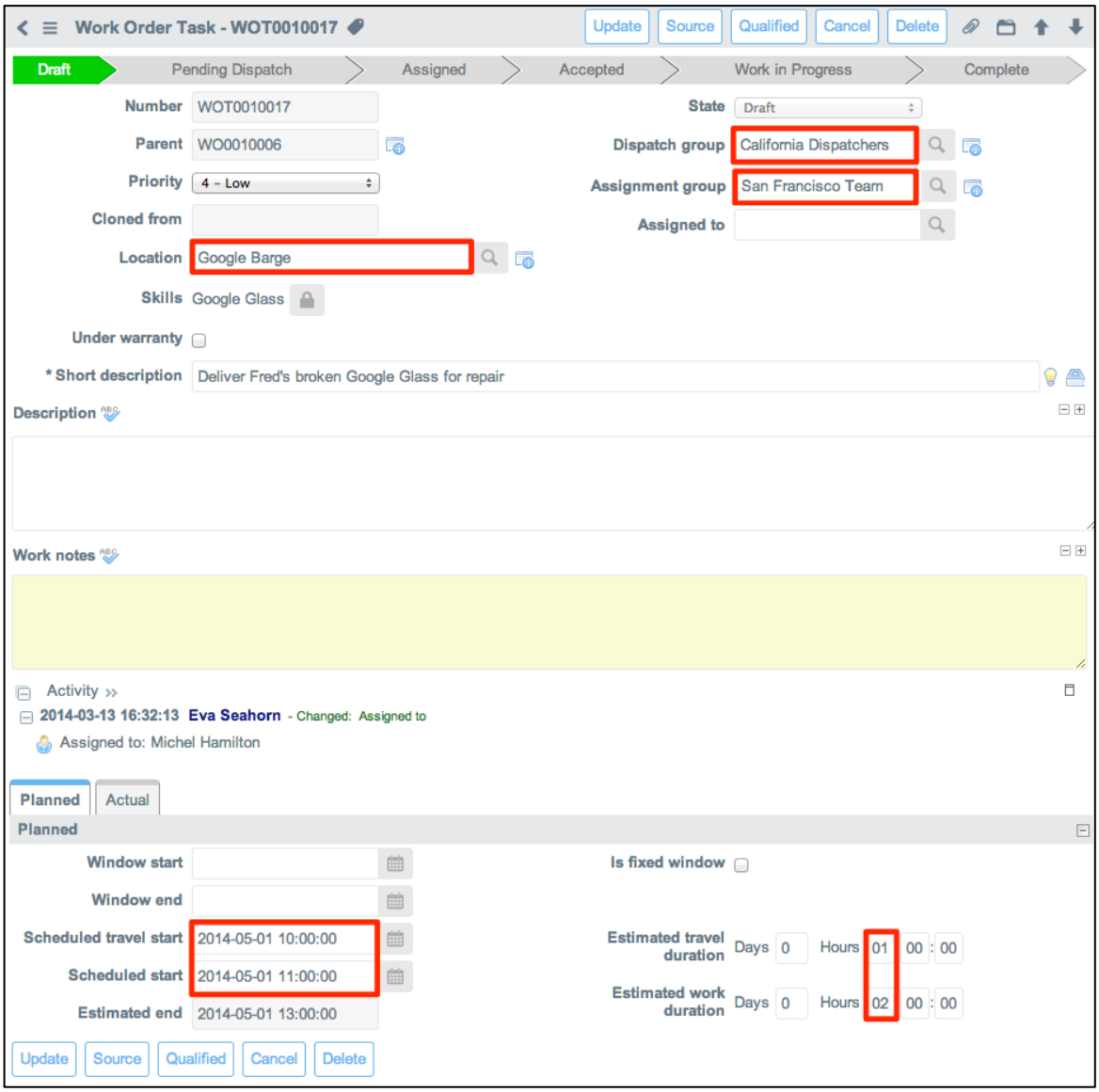
©2014 ServiceNow, Inc. All rights reserved.

2. The **Location** should already be correctly set to the **San Francisco Four Seasons** where the technician needs to pick up the Google Glass unit. In addition, set the **Dispatch group** to **California Dispatchers**, the **Assignment Group** to **San Francisco Team** and all of the timing fields to the values shown below. Click **Update**.



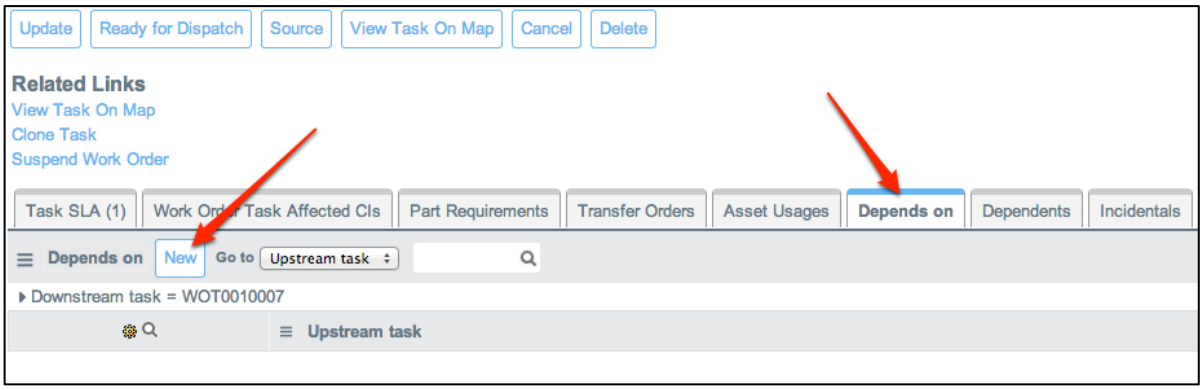
©2014 ServiceNow, Inc. All rights reserved.

3. For the next task, **Deliver Fred's broken Google Glass for repair**, we need to send the technician to the top-secret **Google Barge** in the San Francisco Bay with the same groups and the timing values shown below. This time, right-click the header and choose **Save** so that we remain on the Work Order Task form.

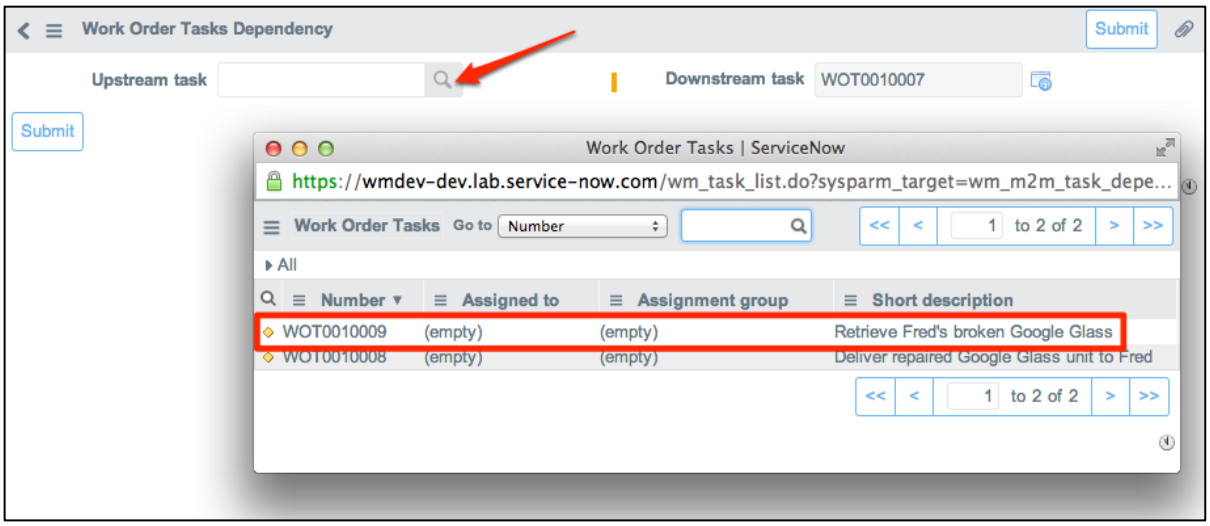


©2014 ServiceNow, Inc. All rights reserved.

4. On the same task, we need to account for the fact that we cannot deliver the broken Google Glass unit to the Google Barge until *after* we have picked it up from Fred. Therefore, this task *Depends on* the previous task. To account for this, find the **Depends on** related list at the bottom of the form and click **New**.



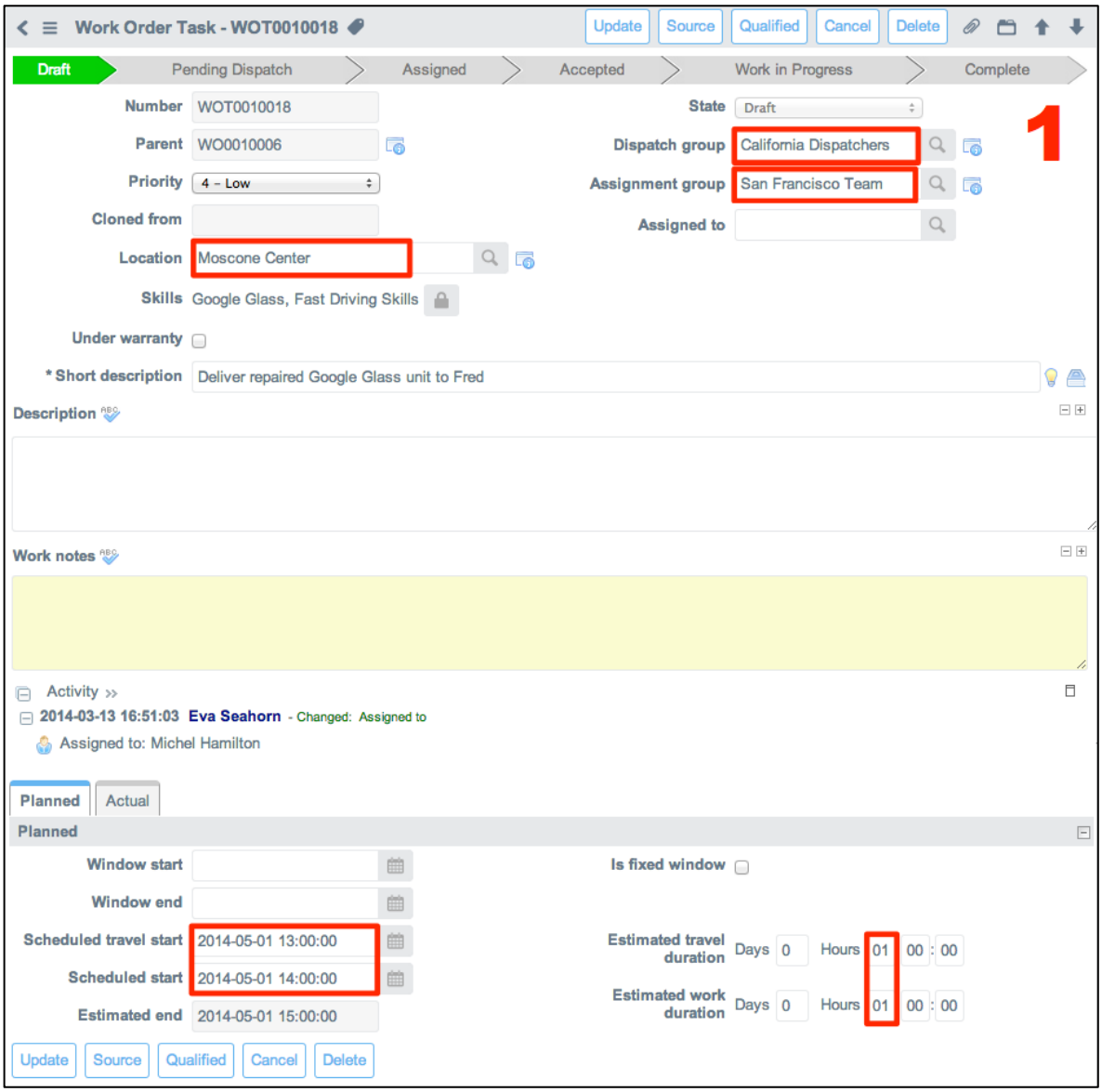
5. In the resulting form, use the search icon to the right of the **Upstream task** to select the task to **Retrieve Fred's broken Google Glass**. Click **Submit**.



©2014 ServiceNow, Inc. All rights reserved.

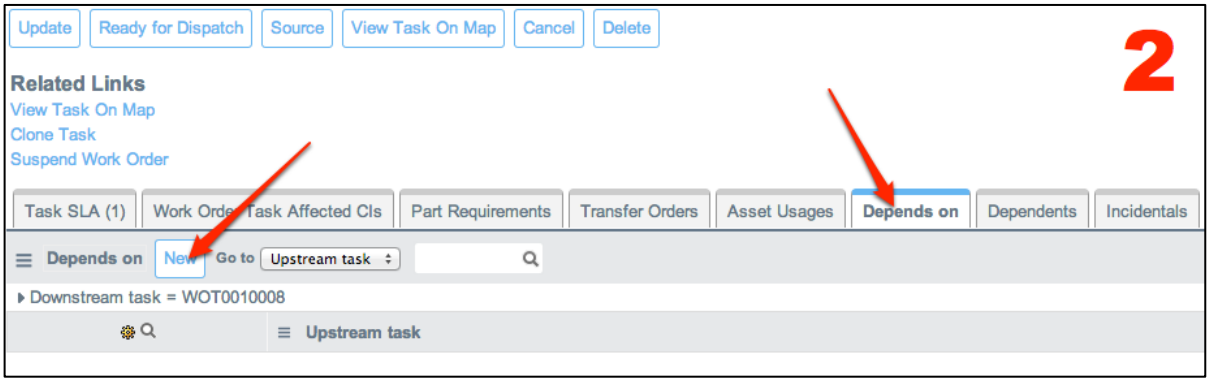
6. After submitting, you should be redirected to the Work Order Task form. From there, click the back arrow at the top of the form until you are back on the parent Work Order. We need to add detail to the final Work Order Task, **Deliver repaired Google Glass unit to Fred**.

   Step 1: Open the task and set the **Location** to **Moscone Center**, use the same groups, and set the timing values as shown below.

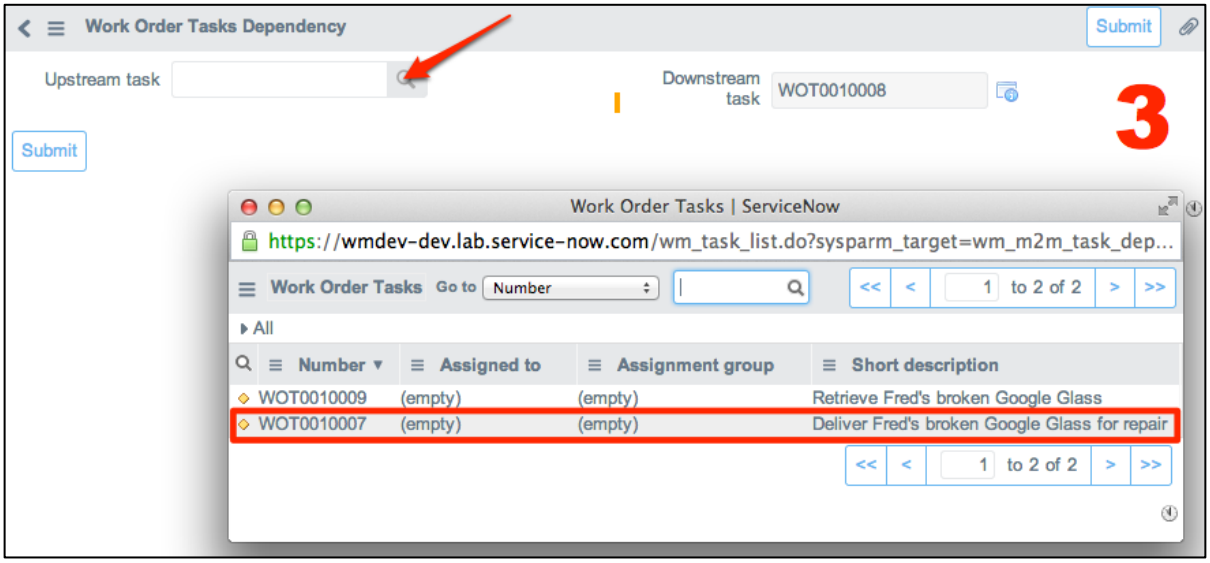


®2014 ServiceNow, Inc. All rights reserved.

Step 2: Finally, create the **Depends on** relationship to the previous task.



Step 3: Click the magnifier to display the popup below.

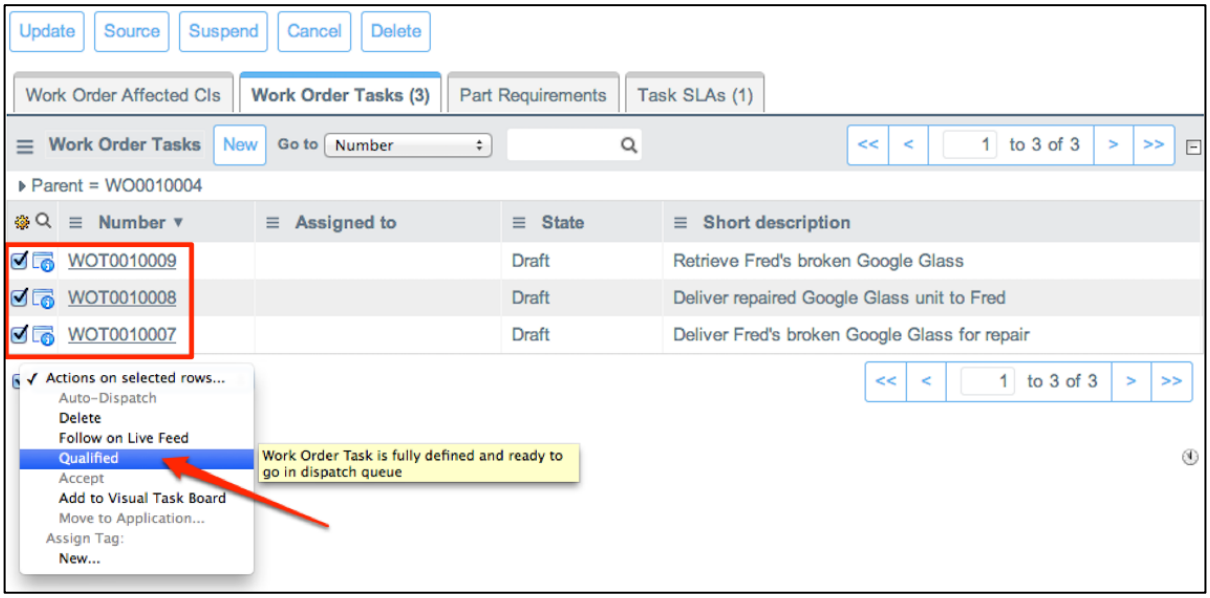


®2014 ServiceNow, Inc. All rights reserved.

Set Work Order Tasks 'Ready for Dispatch'

1. Back on the parent Work Order form, scroll to the **Work Order Tasks** related list at bottom – you should see our 3 Work Order Tasks.

2. Select the check boxes beside all 3 of the tasks, click the drop-down menu at bottom, and select **Qualified**.



©2014 ServiceNow, Inc. All rights reserved.

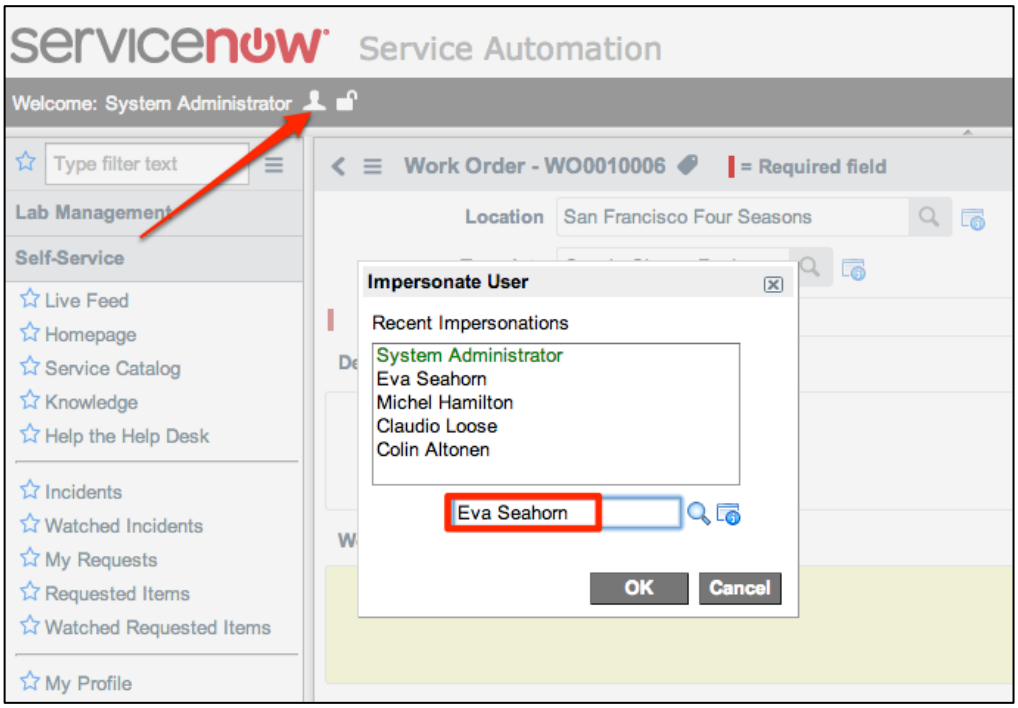
Lab Goal

Now that our Work Order is submitted and Pending Dispatch, it's time for our Field Services team to handle the work. There are a few ways to dispatch Work Order Tasks. Here, let's utilize the Dispatch Map.

Lab 3
Use the Dispatch Map

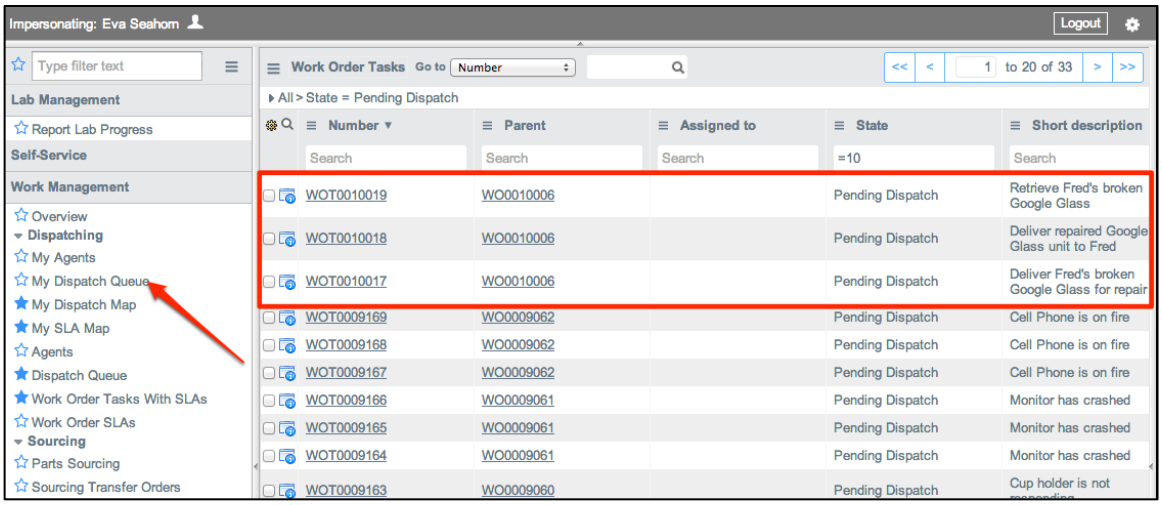
Dispatch a Work Order Task Using the Dispatch Map

1. Using the **Impersonate** icon in the header, impersonate user **Eva Seahorn**. Eva has the role of 'Dispatcher'.



©2014 ServiceNow, Inc. All rights reserved.

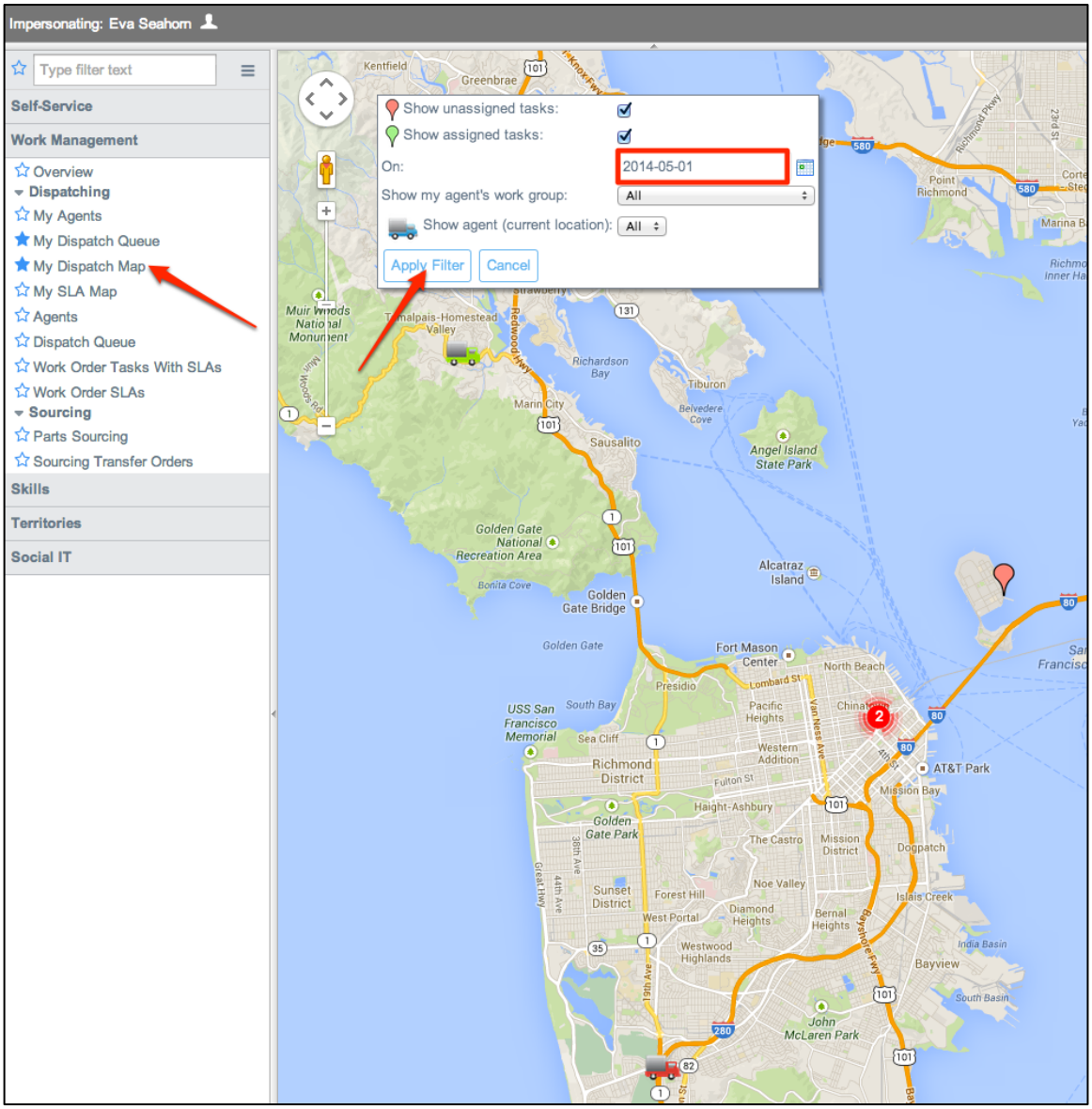
2. Navigate to **Work Management > My Dispatch Queue** in the left nav. You should see the 3 Work Order Tasks that we recently sent out for dispatch.



From here, we could manually assign the tasks to a field services agent of our choice. However, it will be more useful to understand the geographic location of our agents and their current workload so that we can more intelligently assign the tasks.

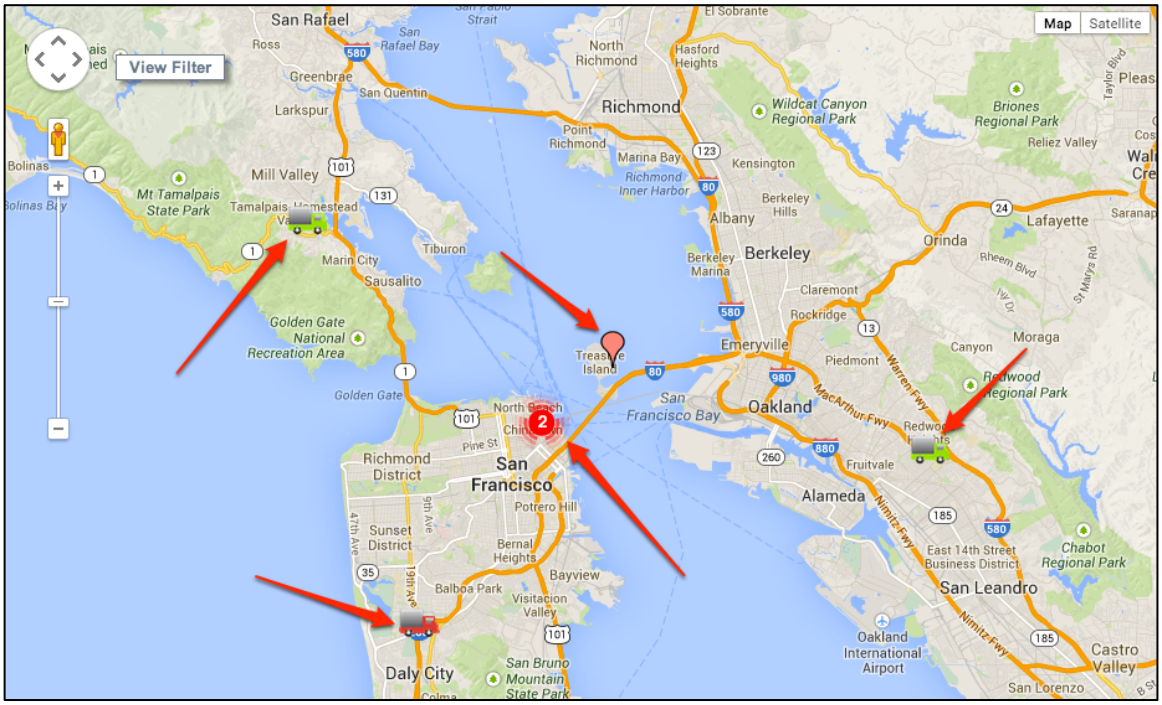
®2014 ServiceNow, Inc. All rights reserved.

3. Navigate to **Work Management > My Dispatch Map**. Click to open the map, and then click the **View Filter** button in the top left of the map view. In the filter, select an **On** date of **2014-05-01**. Ensure the rest of the filter is completed as below and click **Apply Filter.**



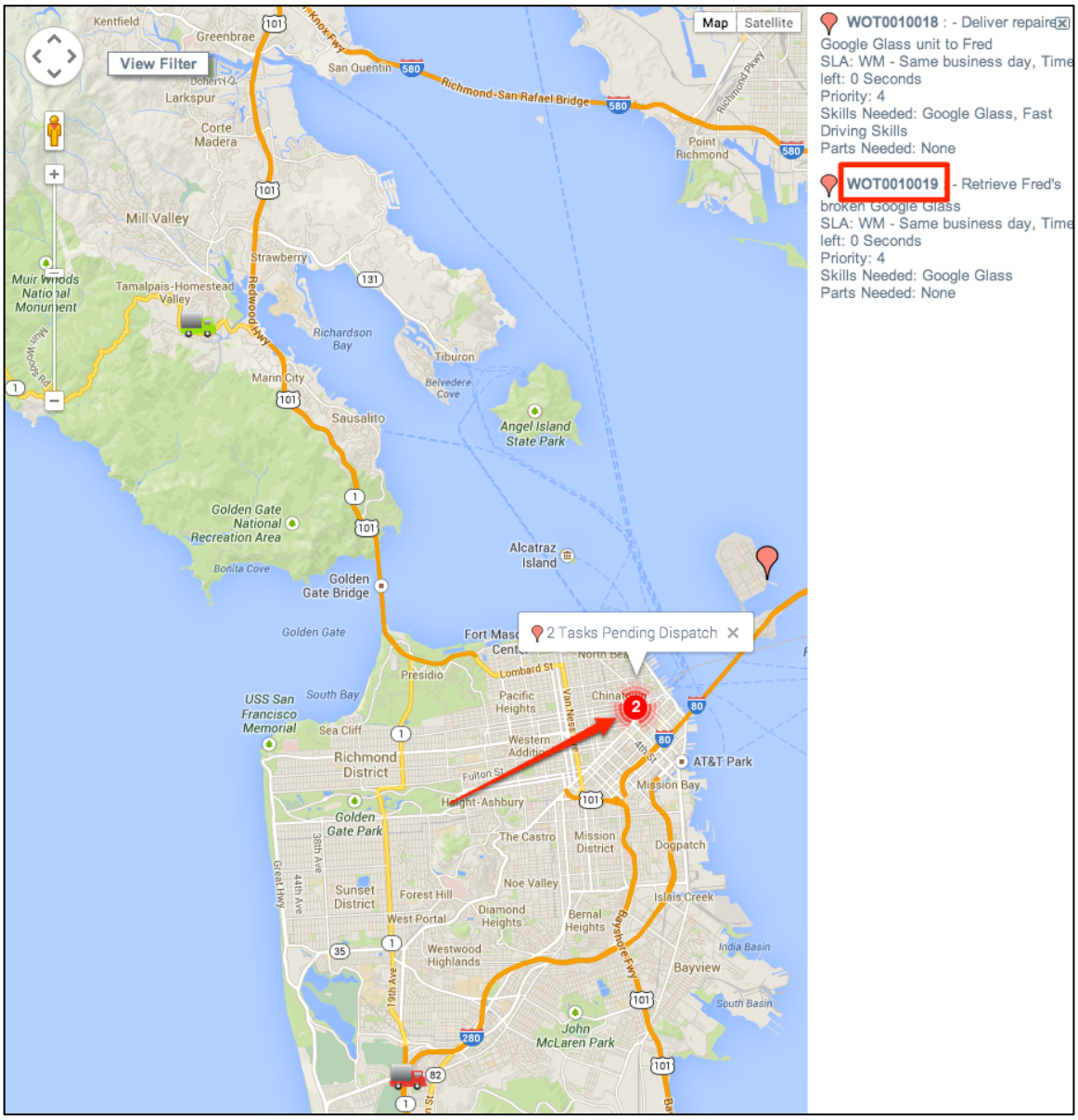
©2014 ServiceNow, Inc. All rights reserved.

4. On the map, notice field service agents represented by truck icons. A green truck represents an agent that is 'on schedule'; a red truck represents an agent that is 'behind schedule'. Also notice the 3 Work Order Tasks on the map. A traditional map marker represents a single task at that location; a circle marker with a number represents multiple tasks in close geographic proximity. Zoom and pan on the map to obtain your ideal view.



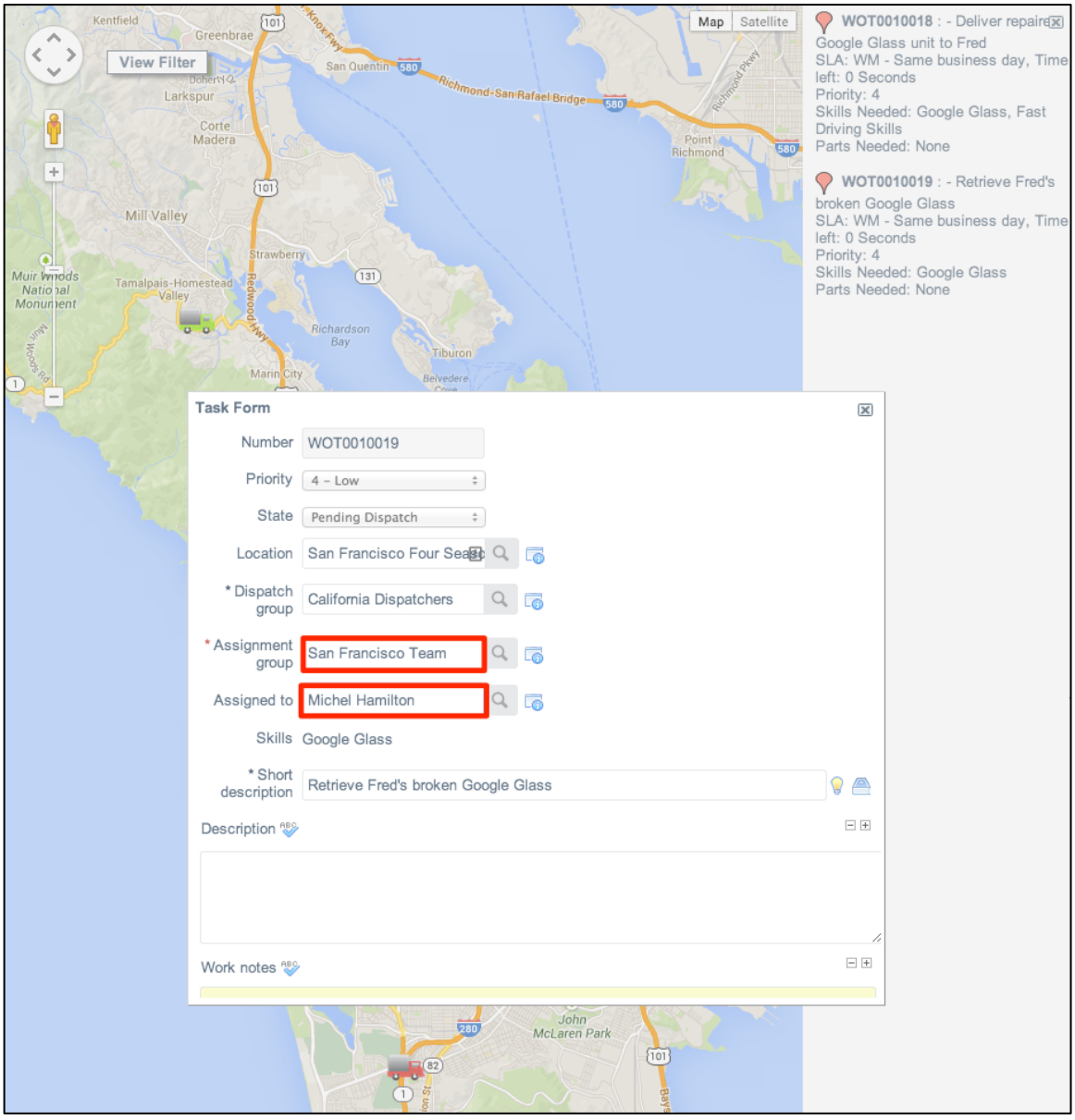
®2014 ServiceNow, Inc. All rights reserved.

5. Click on the trucks for details on particular agents. Click on the red icon labeled ‘2’, and then click **2 Tasks Pending Dispatch** in the pop-up. A sidebar will be displayed showing the Work Order Tasks at this location. Click the number next to the task to **Retrieve Fred’s broken Google Glass.**



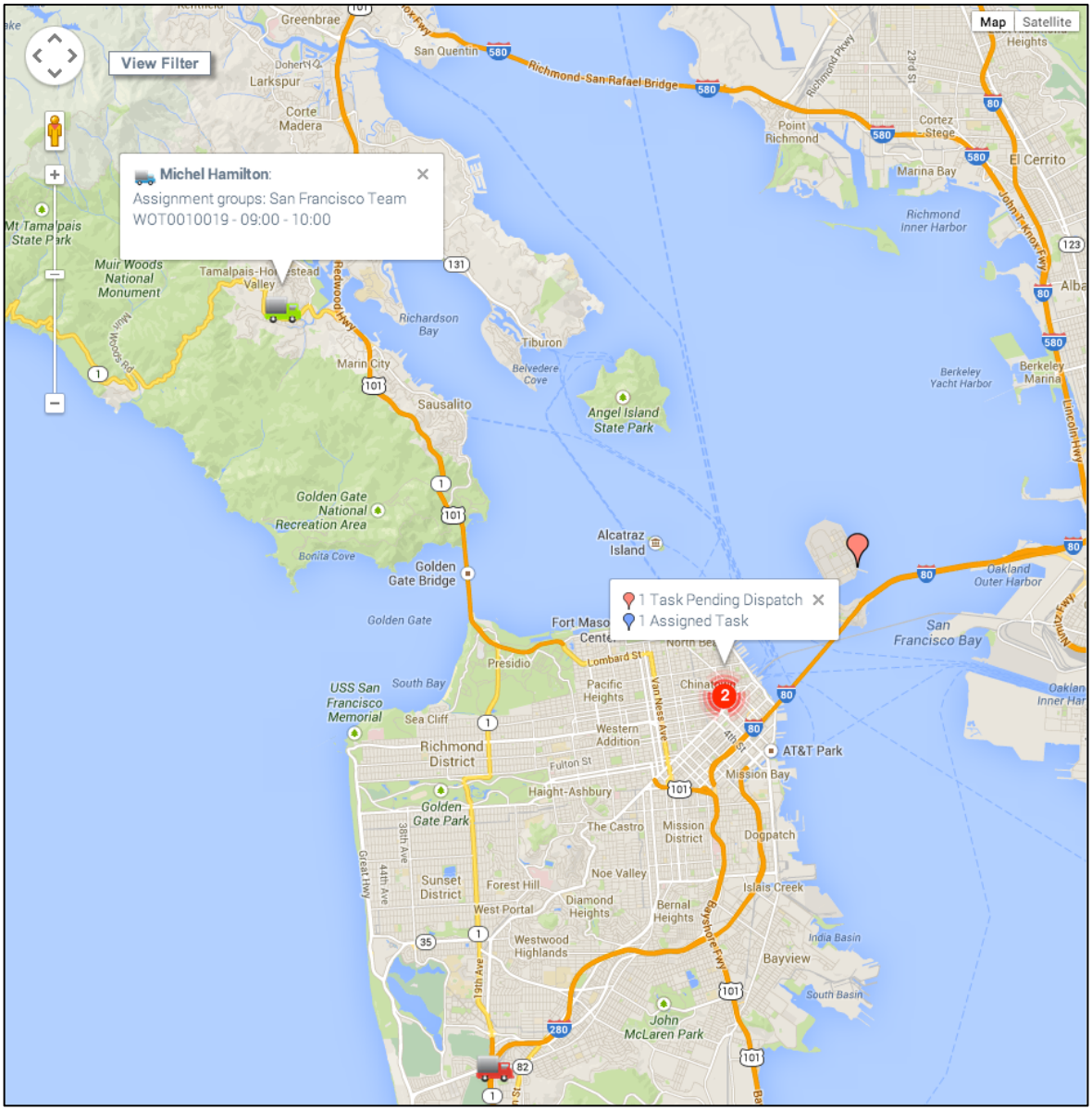
©2014 ServiceNow, Inc. All rights reserved.

6. Based on the agents' locations and scheduling, it appears that Michel is the best agent for this job. In the resulting task form, make sure the **Assignment group** is **San Francisco Team** and the **Assigned to** is **Michel Hamilton**. Scroll to the bottom of the task form and click **Update**.



®2014 ServiceNow, Inc. All rights reserved.

7. Back on the map page filtered to **2014-05-01**, you can click on Michel's truck to see this task added to his queue. You can click on the red circle labeled '2' to see that the task is now **Assigned**.



®2014 ServiceNow, Inc. All rights reserved.

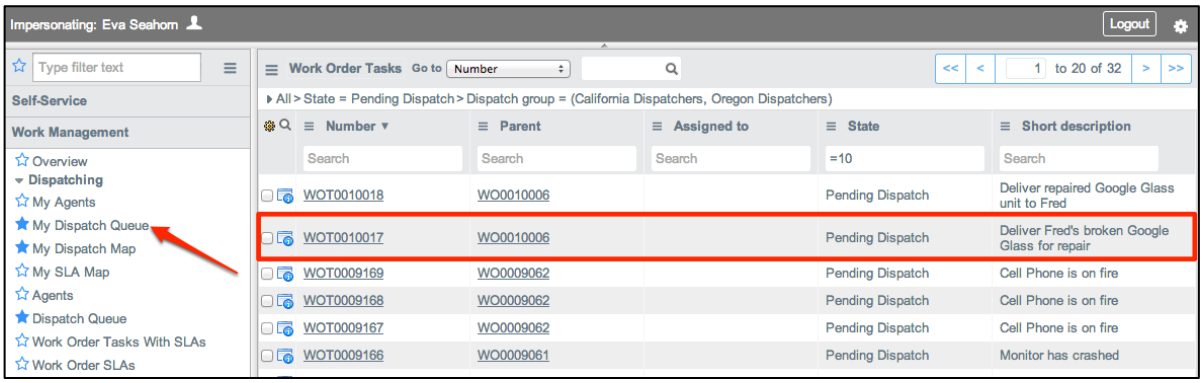
Lab Goal

We could continue using the Dispatch Map to allocate all Work Order Tasks. Instead, let's take a look at another way we can dispatch work to our field service agents using another Task map view.

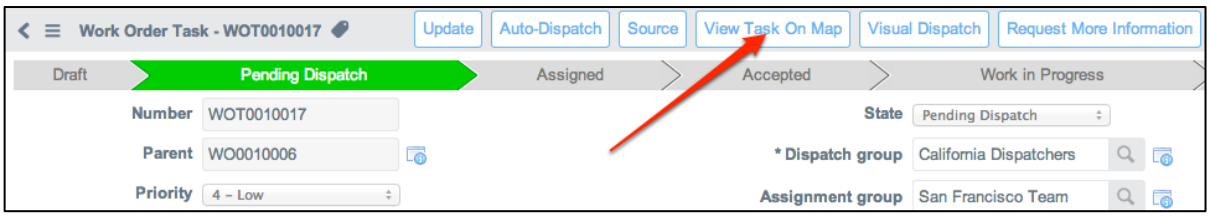
Lab 4
Use the Task Map View

Dispatching a Task Using the Task Map View

1. While still impersonating Eva Seahorn, navigate to **Work Management > My Dispatch Queue**. Click on the 2nd task to dispatch, **Deliver Fred's broken Google Glass for repair**.

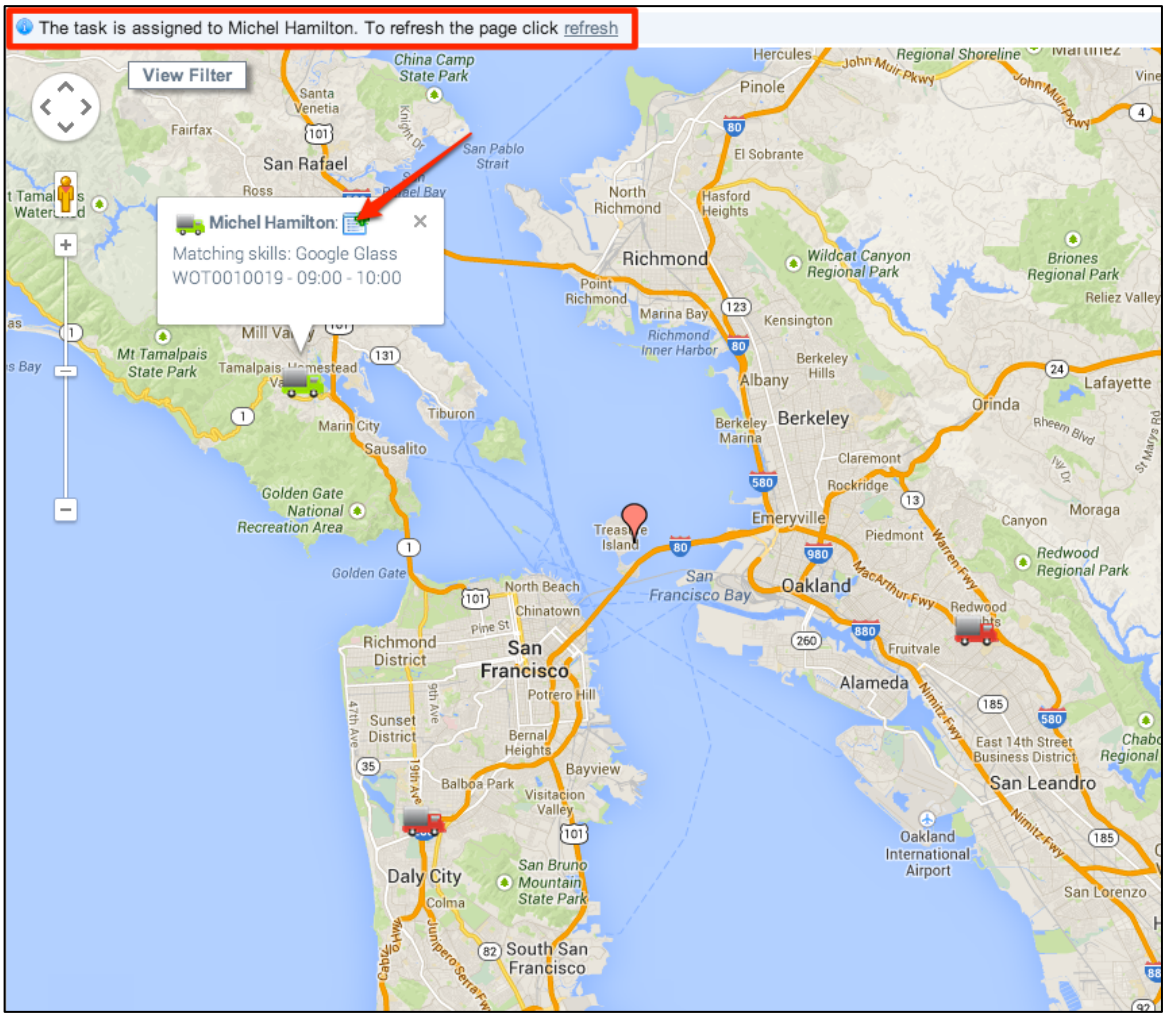


2. On the task form, click the **View Task On Map** button on the header.



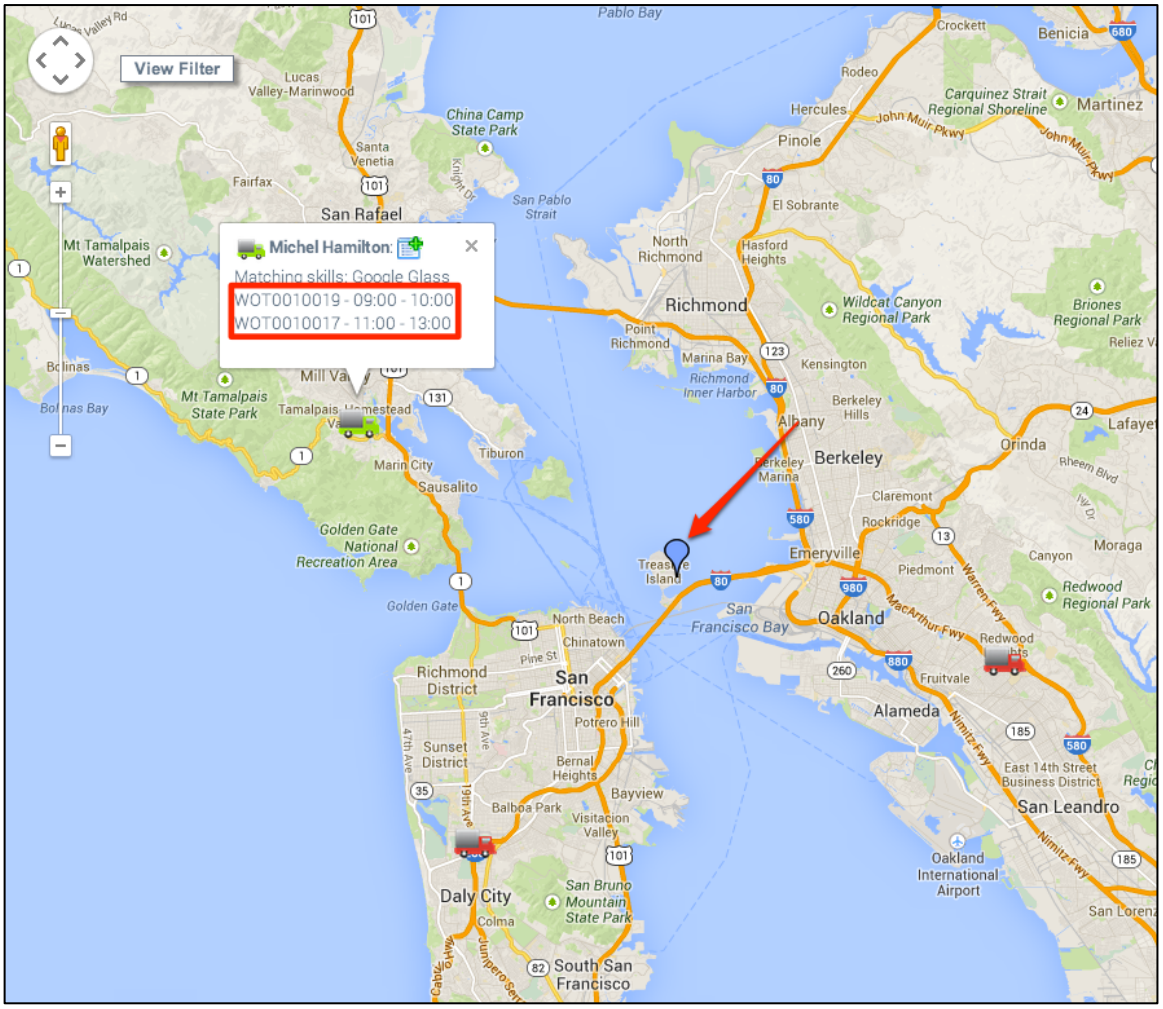
©2014 ServiceNow, Inc. All rights reserved.

3. On the map view, we can see from the red color of the truck icons that 2 of the agents are currently behind schedule. Clicking on the green truck belonging to Michel Hamilton, we see that he is on schedule and has the appropriate skills for the task. Click the icon in Michel's pop-up to assign the task to Michel. An info message will confirm the assignment.



©2014 ServiceNow, Inc. All rights reserved.

4. Click **refresh** in the info message. In the refreshed map view, we now see Michel's 2 tasks listed in his pop-up, and the Work Order Task icon has changed to blue to indicate it is assigned.



©2014 ServiceNow, Inc. All rights reserved.

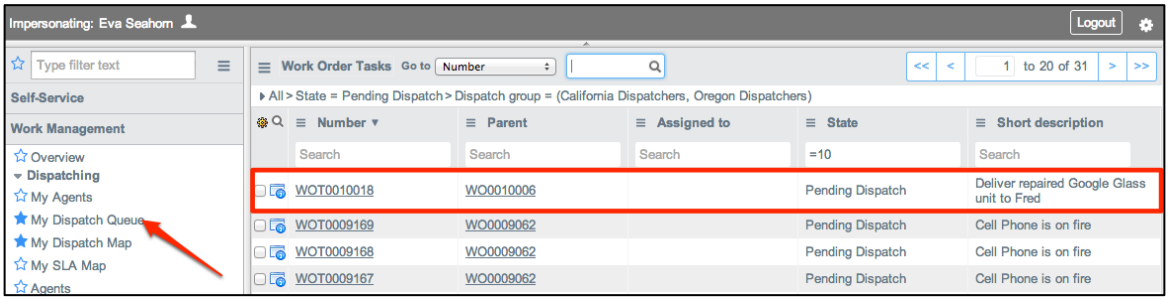
Lab Goal

For our final Work Order Task, we'll dispatch using yet another method - the **Source** button.

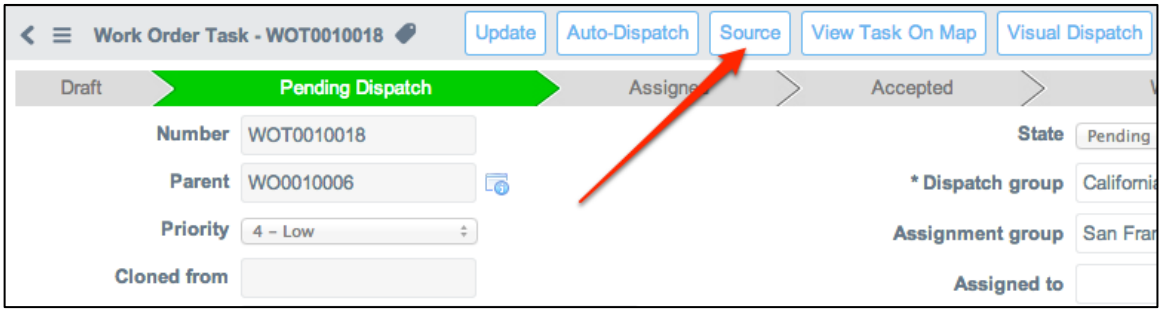
Lab 5
Use the Task Source Button

Dispatch a Work Order Task Using the Source button

1. While still impersonating **Eva Seahorn**, navigate to **Work Management > My Dispatch Queue**. Click on the 3rd and final task to dispatch, **Deliver repaired Google Glass unit to Fred**.

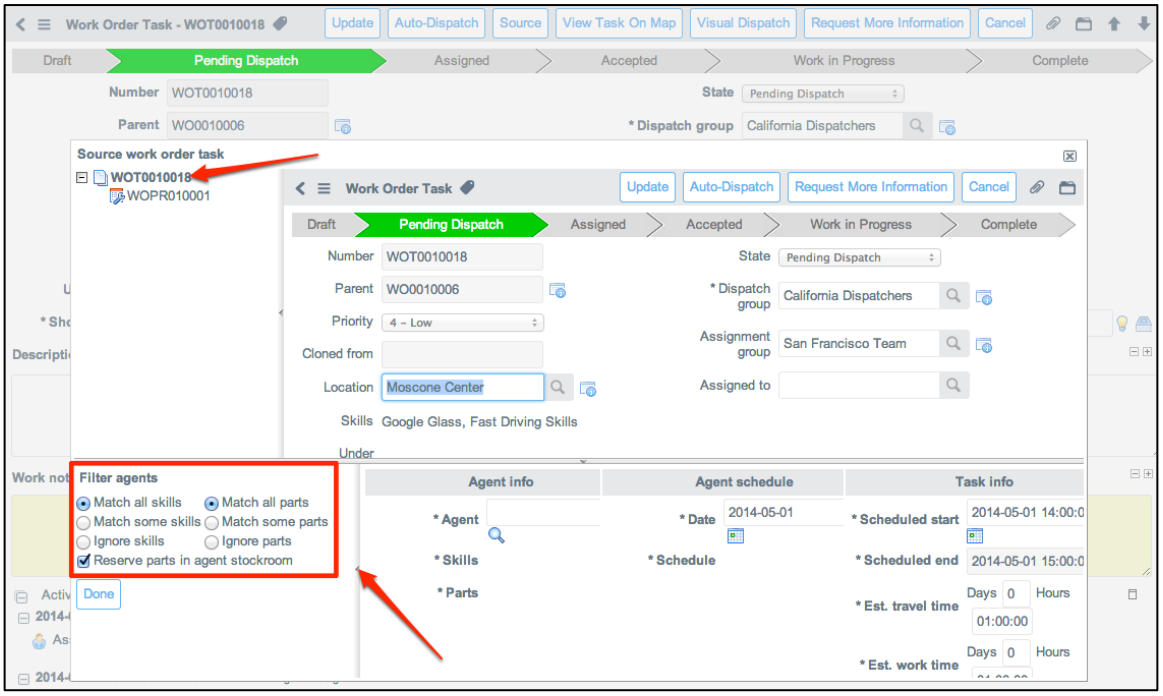


2. On the task form, click the **Source** button on the header.



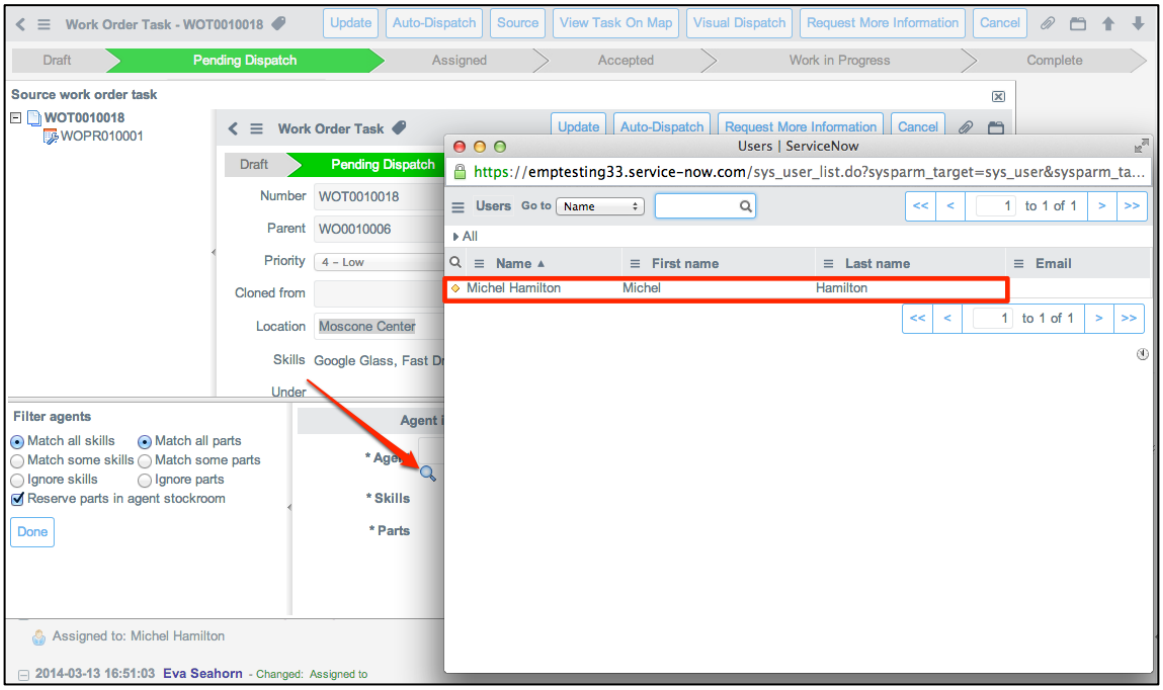
©2014 ServiceNow, Inc. All rights reserved.

3. In the resulting pop-up, first click on the Work Order Task number in the top-left corner. Then, click on the small sidebar at the lower-left of the window – this will display details of the task, along with agent sourcing and task info along the bottom panes.



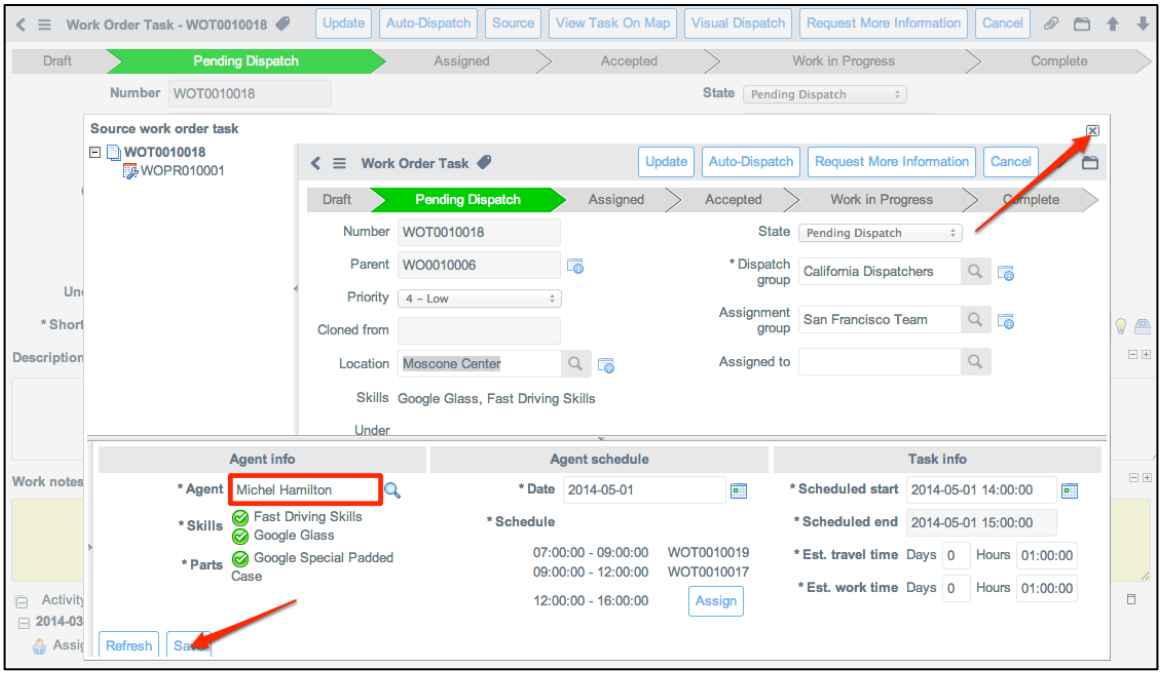
®2014 ServiceNow, Inc. All rights reserved.

4. You may recall that our final task requires skills of **Google Glass** and **Fast Driving Skills**. In addition, the final task requires a part – **Google Special Padded Case**. When you click the magnifying glass beside **Agent**, a filtered list of agents will appear containing only those with the skills and parts we require. Notice that the only matching agent is Michel Hamilton – select him.

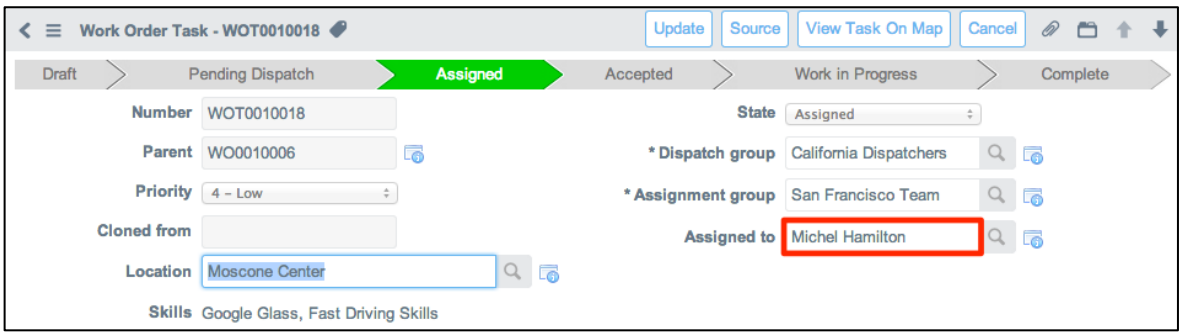


®2014 ServiceNow, Inc. All rights reserved.

5. After selecting Michel, his schedule, skills, and parts will be populated in the window. After ensuring that everything looks good (you may close the sidebar now for better visibility), click **Save** and then close the pop-up window.



6. Back on the task form, right-click the header and click **Reload form**. You will see that the task has now been assigned to Michel Hamilton.



©2014 ServiceNow, Inc. All rights reserved.

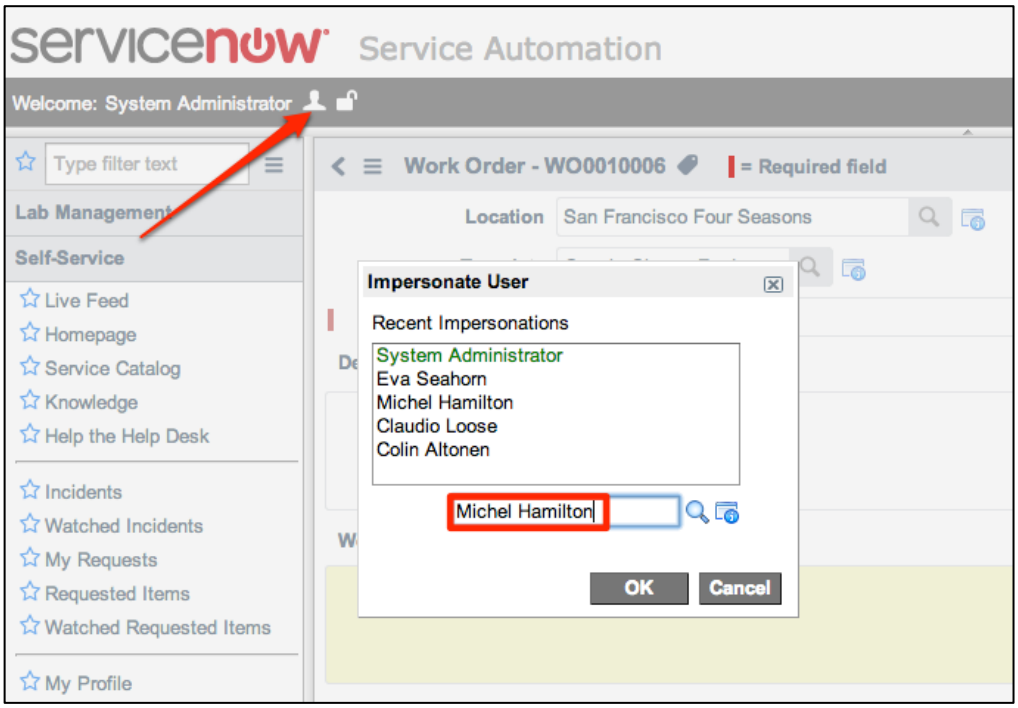
Lab Goal

The Work Order Tasks have been dispatched. Now, it's up to our speedy Field Services Technician to get the work done before Fred's keynote address at Knowledge14!

Lab 6
Work a Task from the Desktop

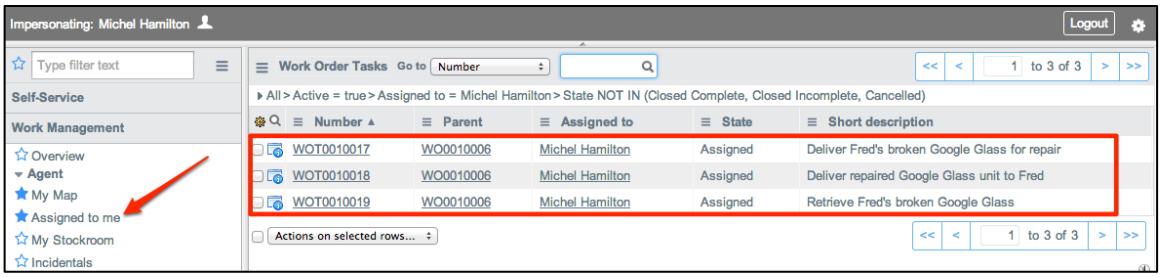
View Assigned Work Order Tasks

1. Using the **Impersonate** icon in the header, impersonate user **Michel Hamilton**. Michel has the role of 'Agent'.



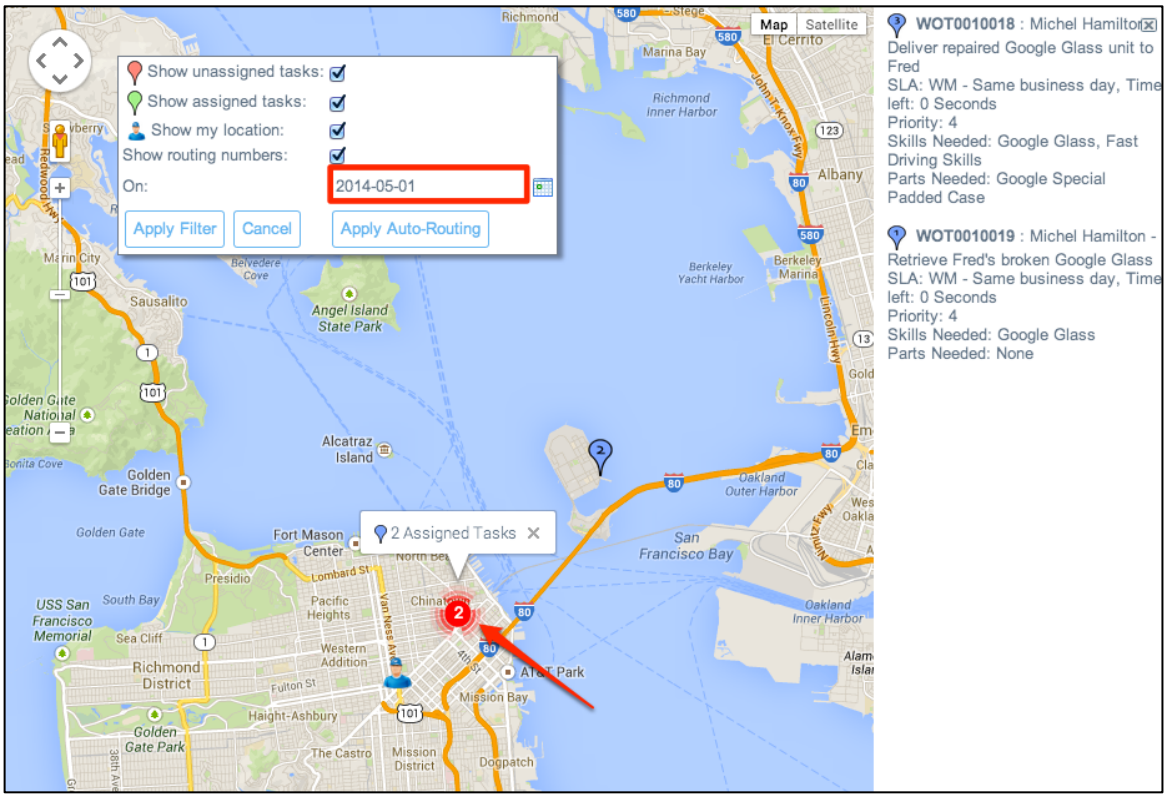
©2014 ServiceNow, Inc. All rights reserved.

2. Navigate to **Work Management > Assigned to me** in the left nav. You should see the 3 Work Order Tasks that were assigned to Michel.



Visualize Work Order Tasks on the Map

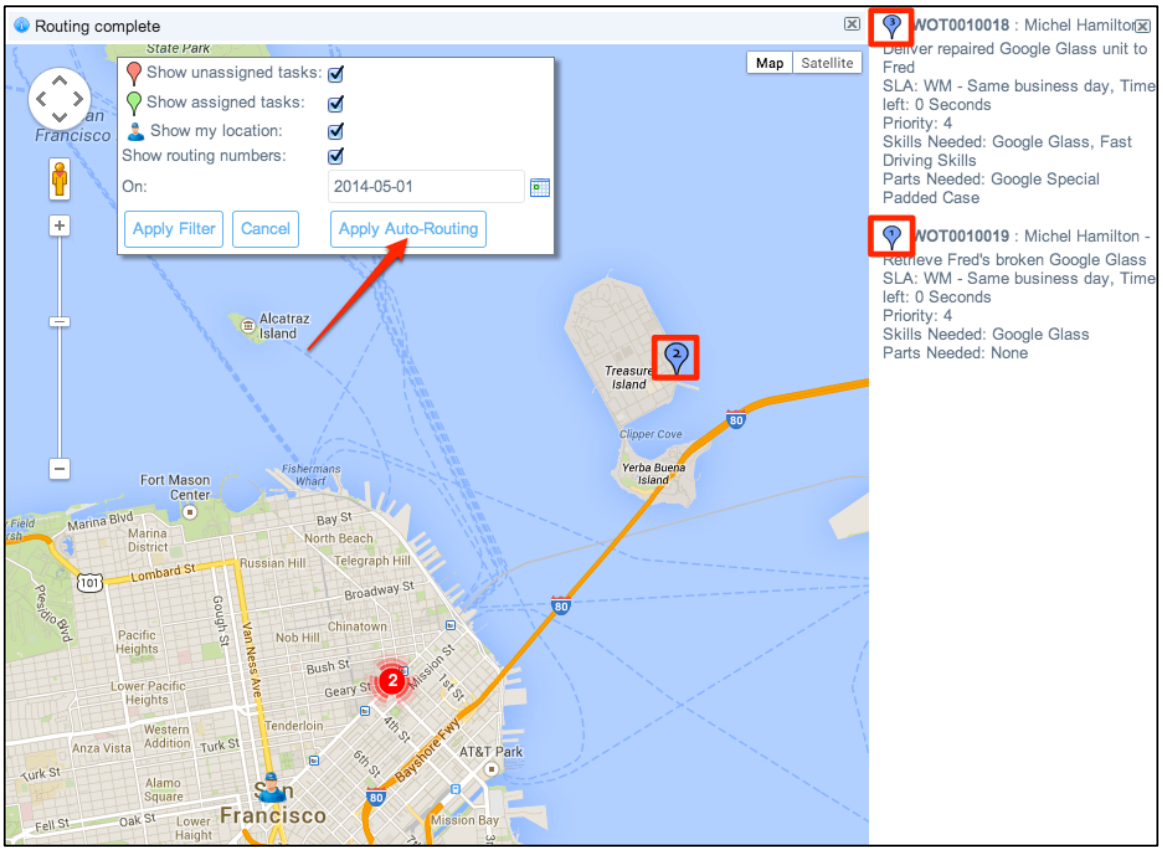
1. Navigate to **Work Management > My Map**. On the filter, set the **On** date to **2014-05-01** and click **Apply Filter**. You should see a map view indicating Michel's location, as well as the location of his 3 Work Order Tasks. Click on Michel's tasks to view details.



©2014 ServiceNow, Inc. All rights reserved.

Apply Auto Routing

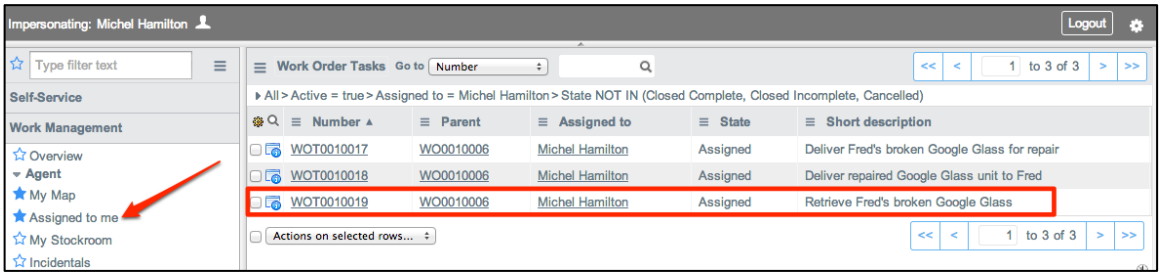
1. On the map, click **View Filter** and then click **Apply Auto-Routing**. This will automatically sort Michel's task according to their geographic proximity, schedule, and dependency to reduce overall driving time to complete his tasks. After auto-routing, numbers will be placed on each task indicating the order in which they should be completed. This same functionality is available on both the desktop and mobile interfaces to best enable field service agents, regardless of how they access ServiceNow.



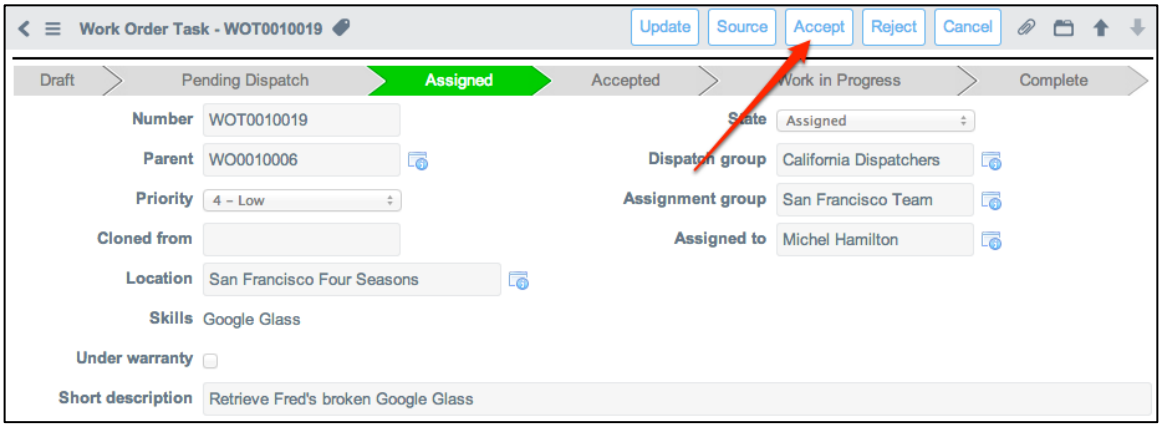
©2014 ServiceNow, Inc. All rights reserved.

Accept Work Order Tasks

1. Before beginning work, Michel should verify and accept the tasks that have been assigned to him. Navigate to **Work Management > Assigned to me**. Click on the first scheduled task, **Retrieve Fred's broken Google Glass**.



2. On the task form, review the work and ensure it is suitable for Michel. Once complete, click **Accept** in the form header.

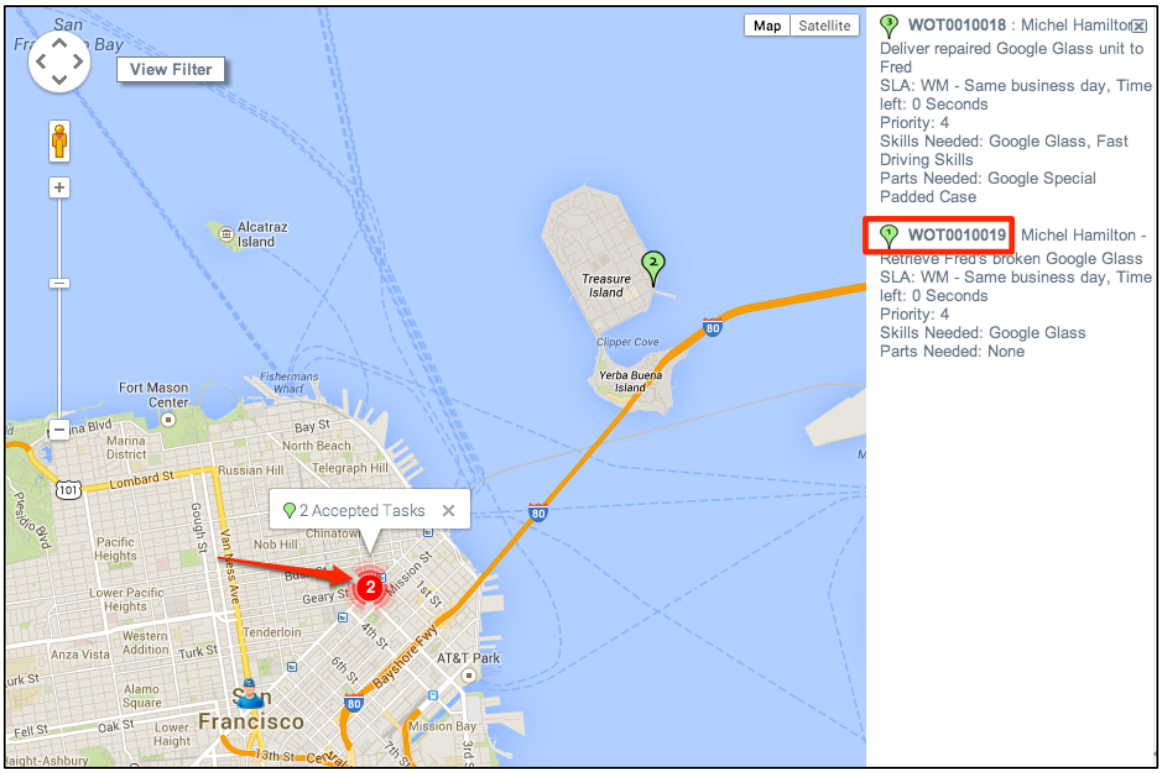


3. Complete Steps 1 & 2 for the remaining Work Order Tasks in Michel's queue. Alternatively, select multiple tasks from the list view and click **Accept** in the drop-down menu at the bottom of the list.

©2014 ServiceNow, Inc. All rights reserved.

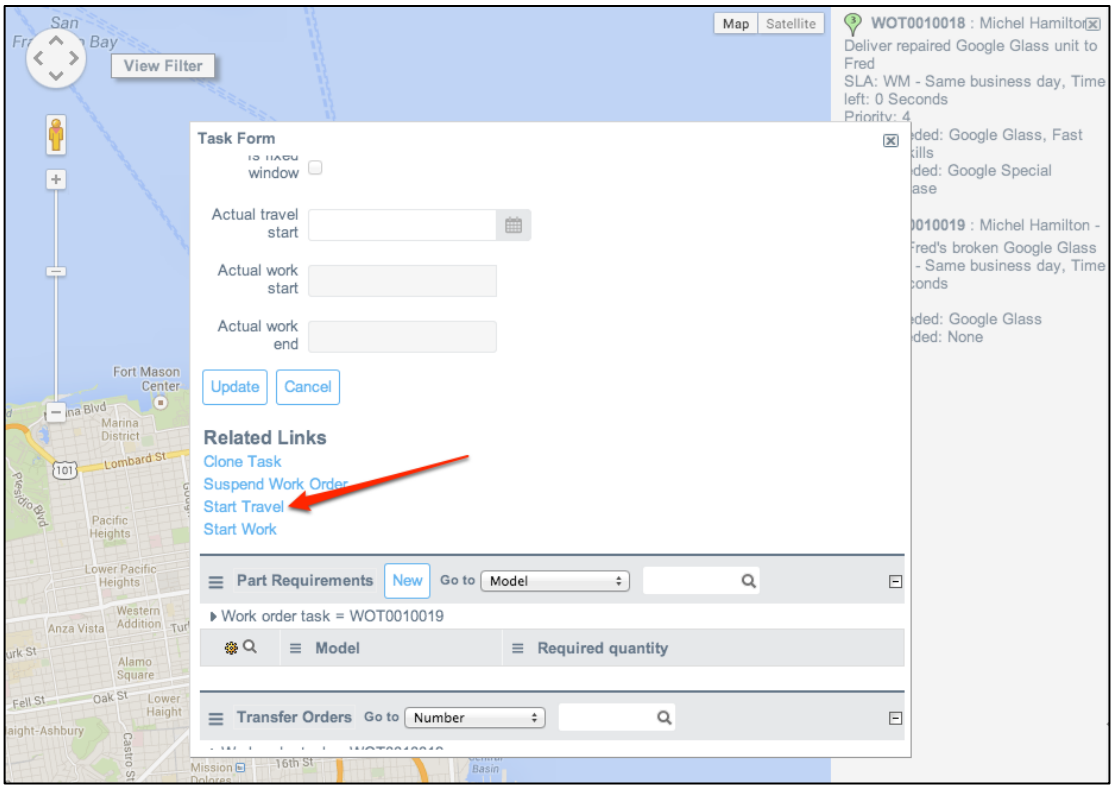
Work a Task

1. Still impersonating Michel Hamilton, navigate back to **Work Management > My Map**, and ensure the filter is set to **2014-05-01**. Notice that the task icons have now changed to a color of green to indicate they have been 'Accepted'. Click on the cluster of 2 tasks and Click on the number for Michel's first task, **Retrieve Fred's broken Google Glass**.



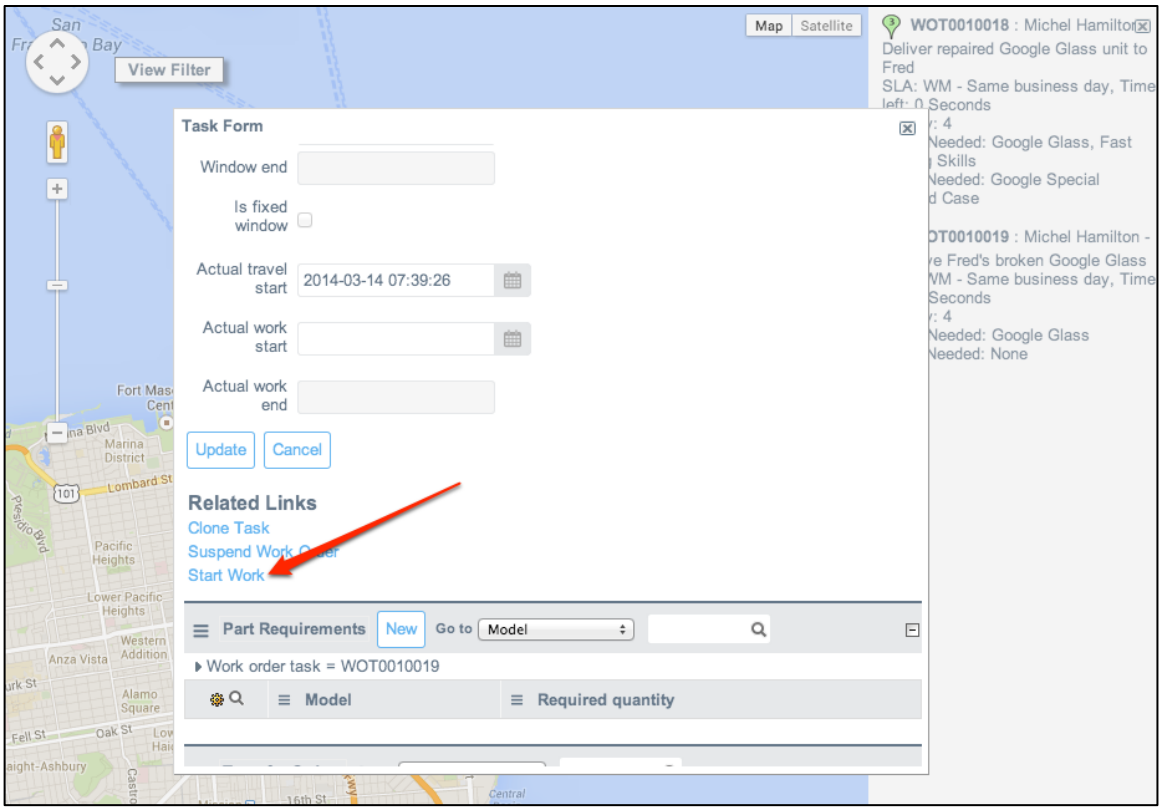
©2014 ServiceNow, Inc. All rights reserved.

2. A task form will now overlay the map. When Michel is ready to begin travel to his first task, scroll to the bottom of the task and click **Start Travel**.



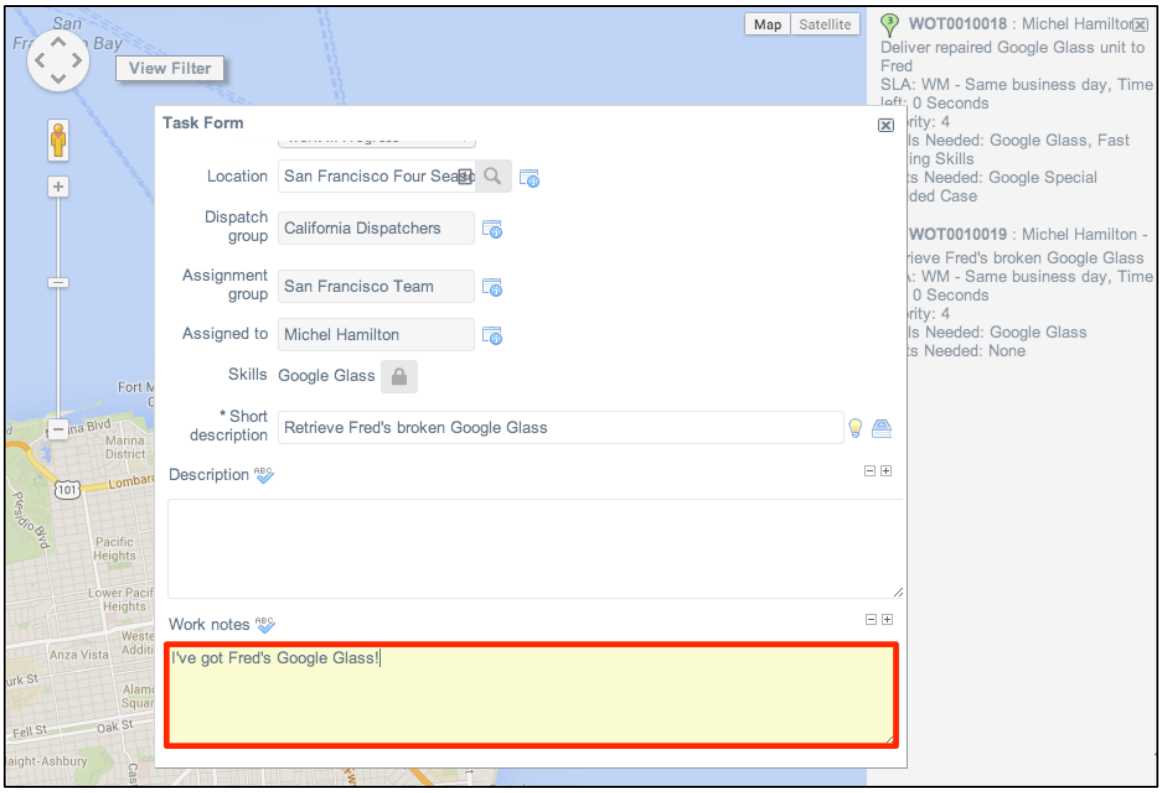
©2014 ServiceNow, Inc. All rights reserved.

3. Michel has arrived at Fred's hotel! Scroll to the bottom of the task to click **Start Work**. Note that the **Actual travel start** automatically populated after our last step.



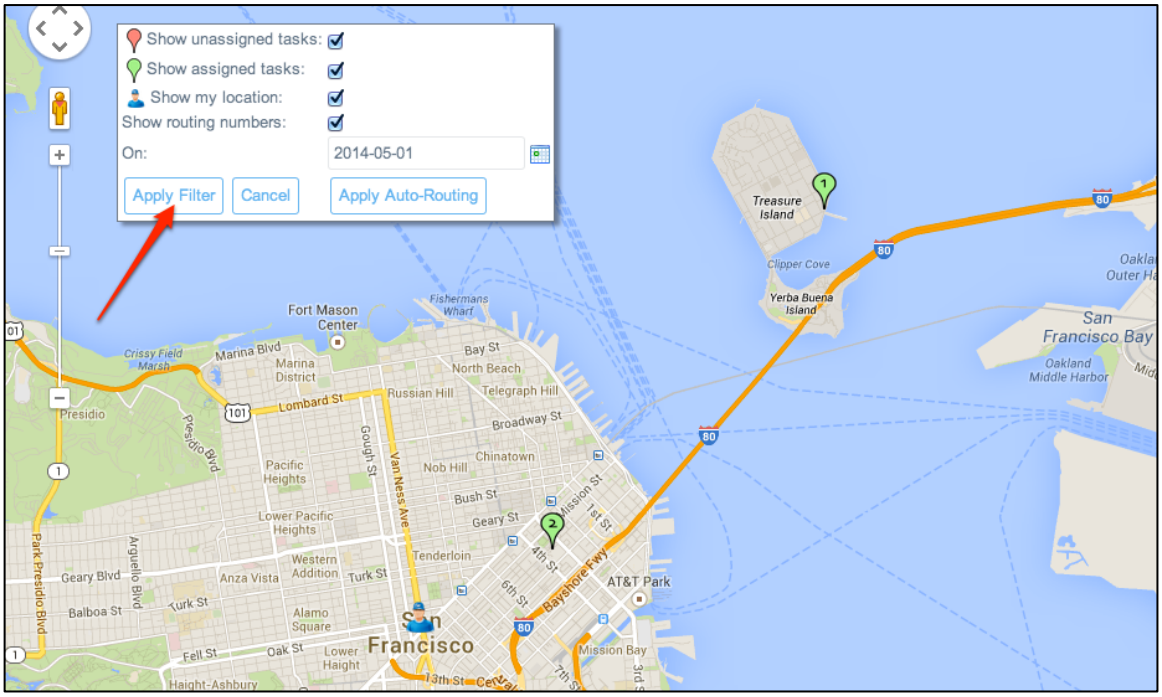
©2014 ServiceNow, Inc. All rights reserved.

4. Once Michel has retrieved Fred's broken Google Glass, this task is complete. Scroll down to add **Work notes** to the task and then click **Close Complete**. Notice that **Actual work start** was automatically populated after our last step – the same will happen to **Actual work end** after we complete the task. Also note that you *must* enter work notes before completing the task.



©2014 ServiceNow, Inc. All rights reserved.

5. After closing the task, close the pop-up window to return to the map view. Open the **View Filter** box and click **Apply Filter** to reload the map. Notice that the first task has now disappeared, leaving only Michel's 2 remaining tasks with the appropriate ordering.



©2014 ServiceNow, Inc. All rights reserved.

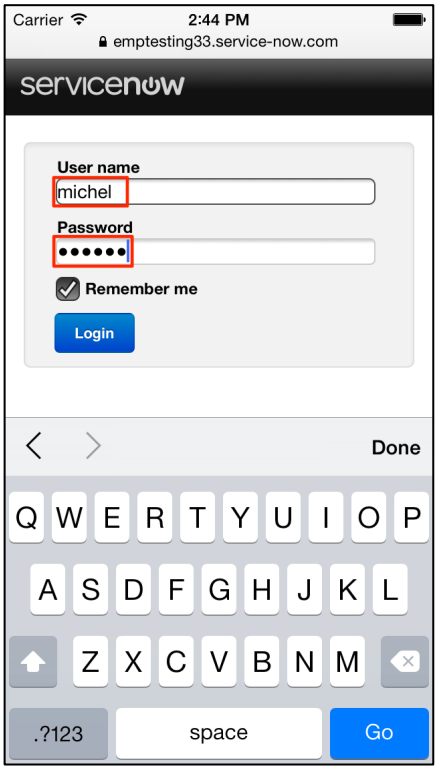
Lab Goal

Field service agents don't always have a laptop at their disposal. ServiceNow makes it easy for agents to do their work using a mobile device.

Lab 7
Work a Task from a Mobile Device

Login to the Mobile Interface

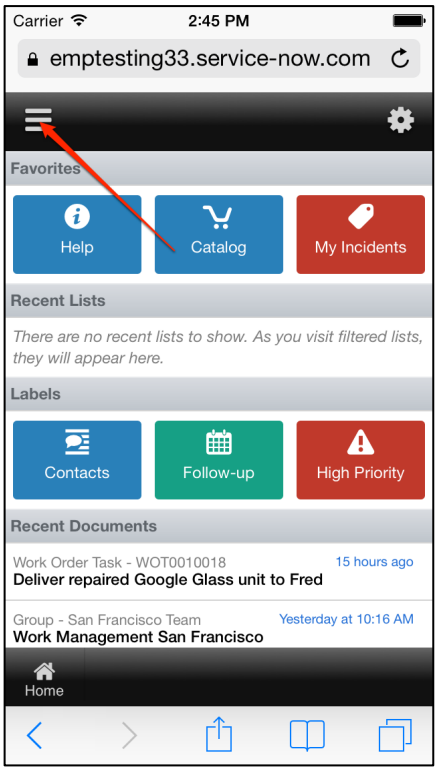
1. On your internet-connected mobile phone, navigate to the URL of your lab instance and login using Michel Hamilton's credentials of username: **michel** and password: **michel.**

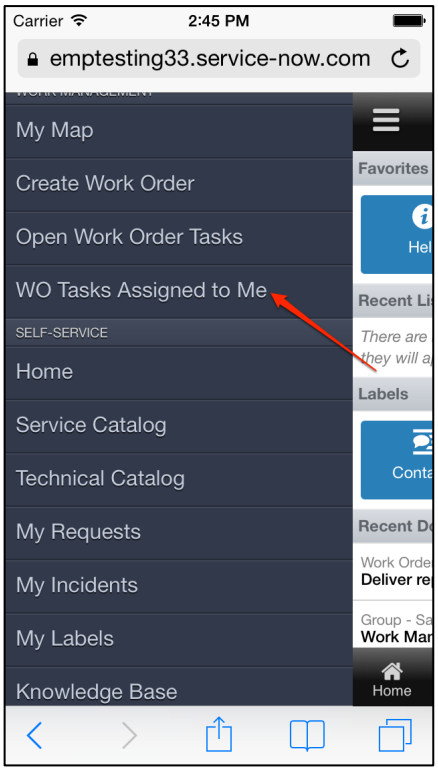


©2014 ServiceNow, Inc. All rights reserved.

Work a Task from the Mobile Device

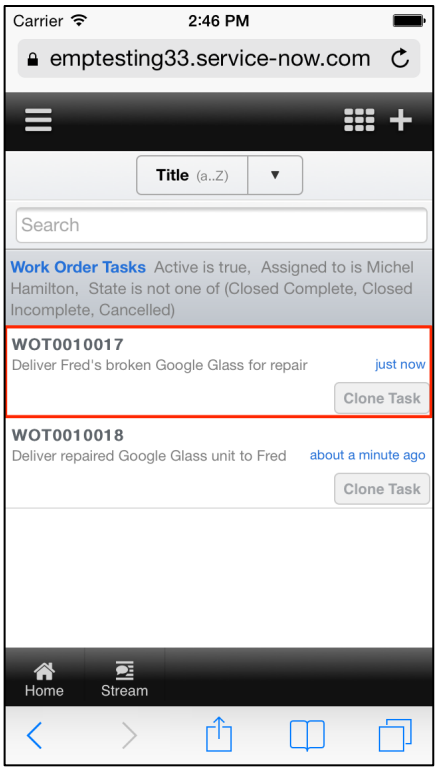
1. On the homepage, tap the 'hamburger' icon in the top-left of the screen to open the menu. From the menu, tap **WO Tasks Assigned to Me**.

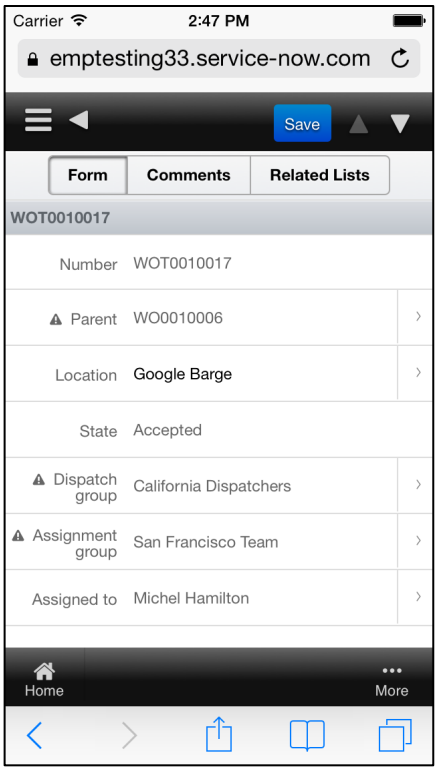




©2014 ServiceNow, Inc. All rights reserved.

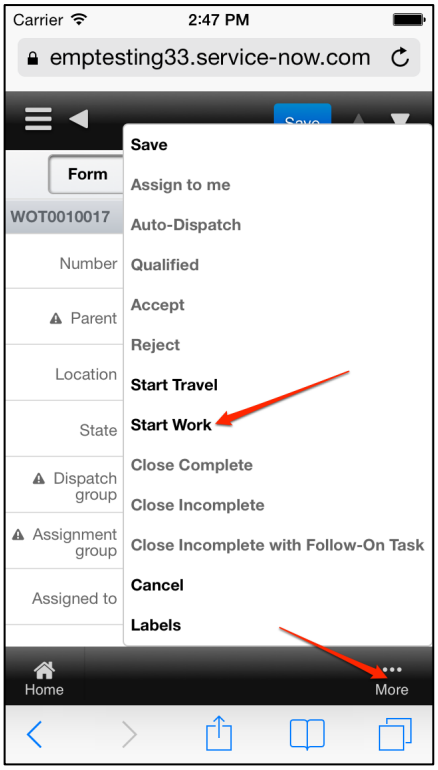
2. A list of Michel's open tasks will be displayed. Tap on the next scheduled task, **Deliver Fred's broken Google Glass for repair**.





©2014 ServiceNow, Inc. All rights reserved.

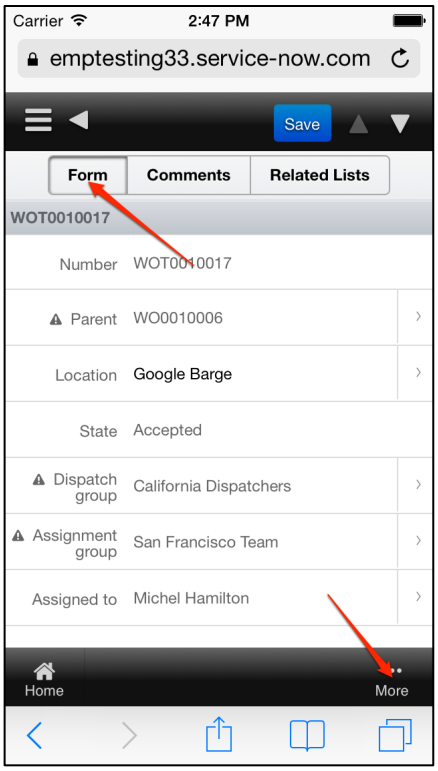
3. On the task form, tap the **More** icon at the bottom right, then tap **Start Work** to begin the task (we'll skip **Start Travel** this time). Next, navigate to the **Comments** tab. Type in work notes for the task, then tap the **Work Notes** button to save the notes.

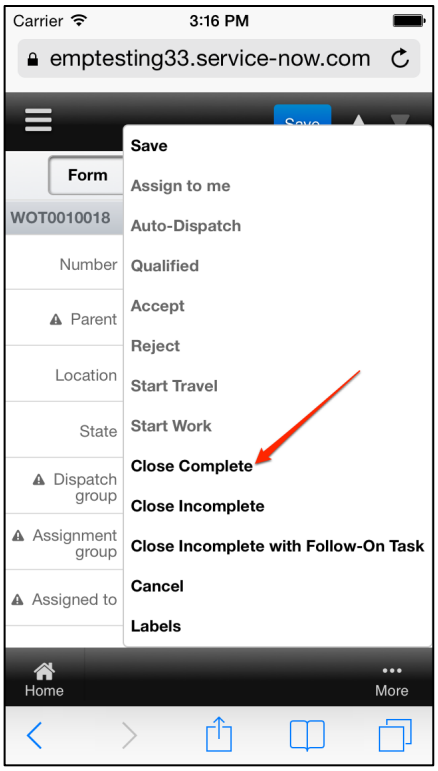




©2014 ServiceNow, Inc. All rights reserved.

4. Finally, navigate back to the **Form** tab, tap the **More** icon at bottom right again, and tap **Close Complete** to finish the task.





©2014 ServiceNow, Inc. All rights reserved.

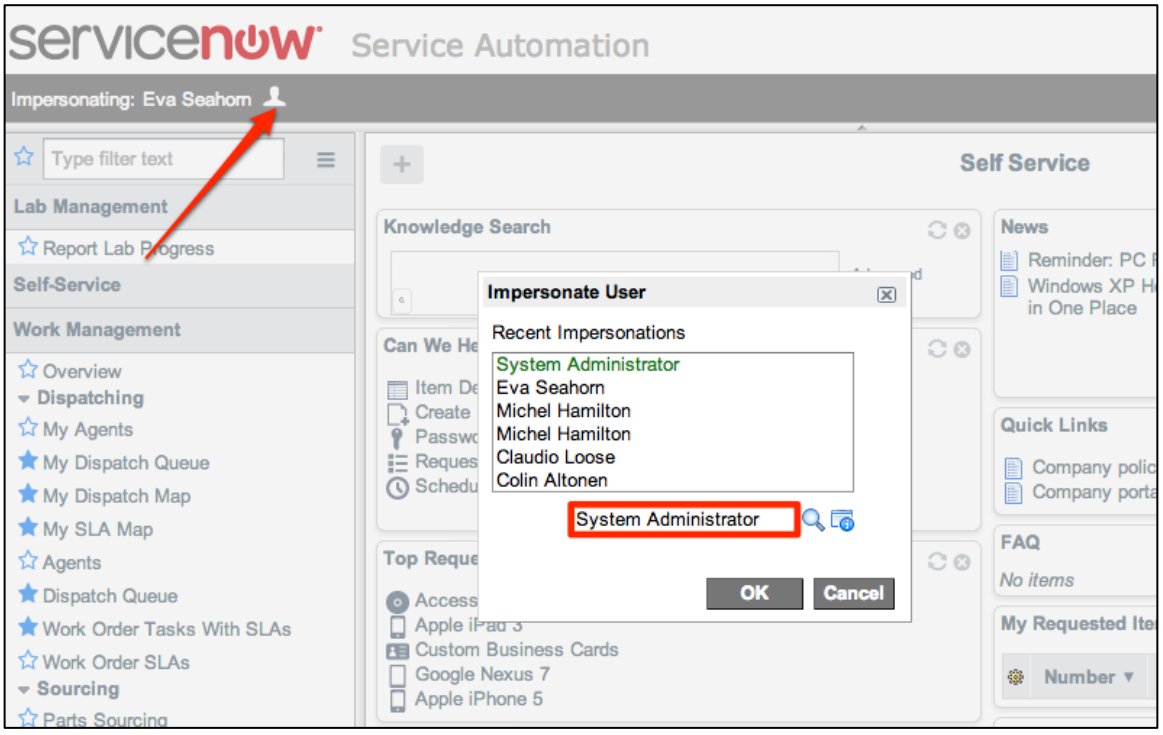
Lab Goal

Whether using a laptop or a mobile device, ServiceNow can attempt to geolocate field service agents automatically so that current locations are always known. Geolocation happens each time an agent opens a task. Let's enable geolocation for Michel and see it in action!

Lab 8
Geolocate from a Mobile Device

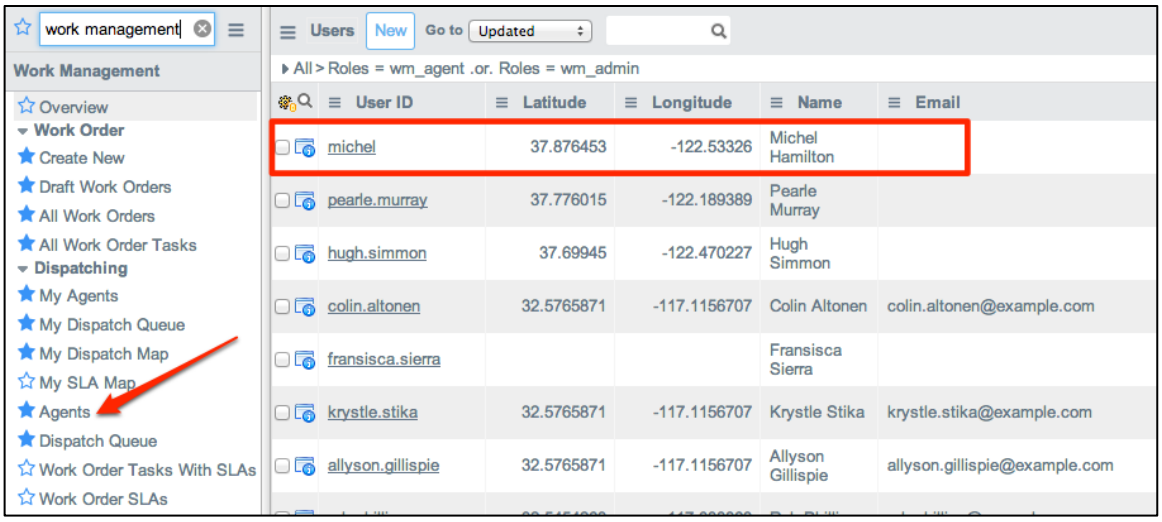
Enable Geolocation for an Agent

1. Back on the desktop interface, use the **Impersonate** icon in the header to impersonate user **System Administrator**.

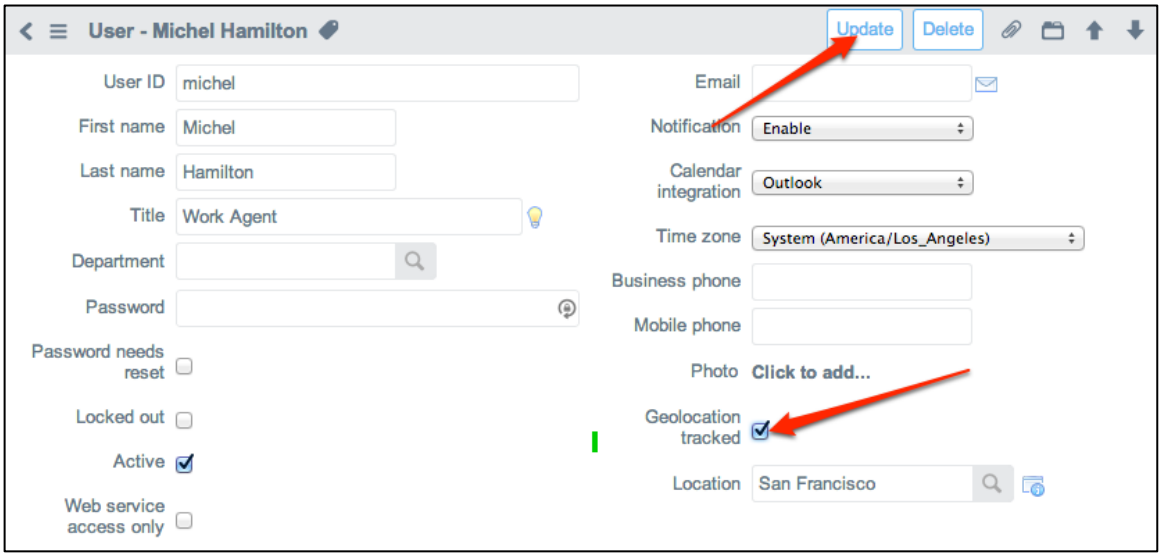


©2014 ServiceNow, Inc. All rights reserved.

2. Navigate to **Work Management > Agents**. In the list of agents, click to open Michel Hamilton's user record.



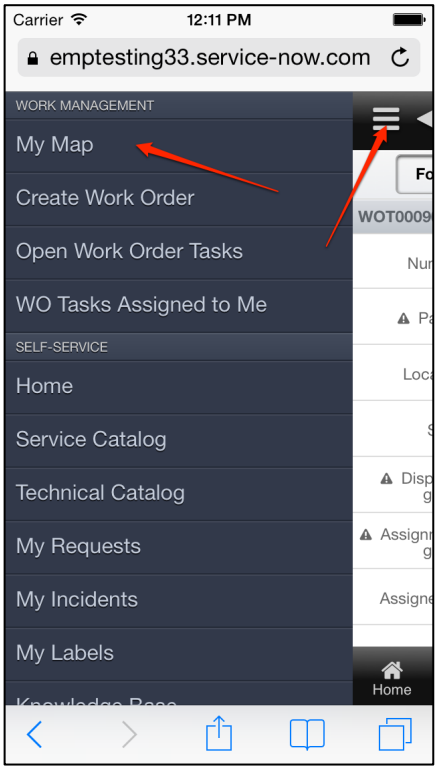
3. On Michel's user record, find the checkbox for **Geolocation tracked** and set it to true. Click **Update**.

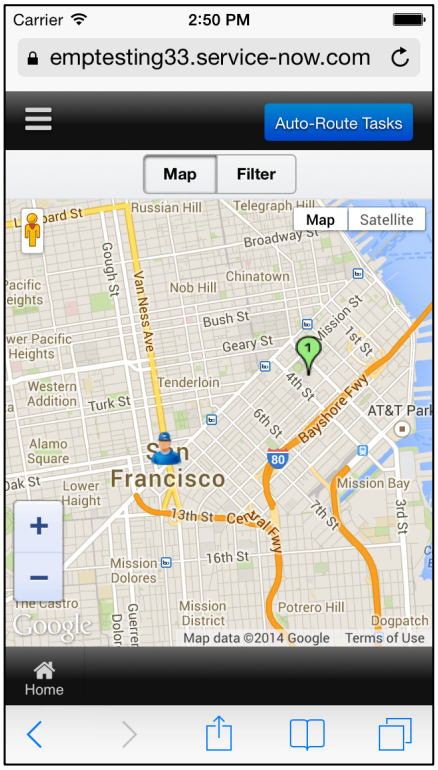


©2014 ServiceNow, Inc. All rights reserved.

Work the Final Task from the Mobile Device

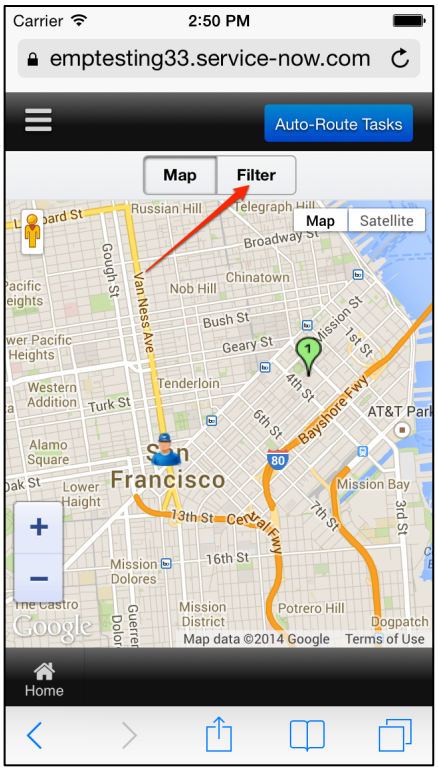
1. Back on your mobile device, you should still be logged in as **Michel Hamilton**. Tap the 'hamburger' icon at top-left. From the menu, tap **My Map** to access the mobile map view. Notice Michel's current location.

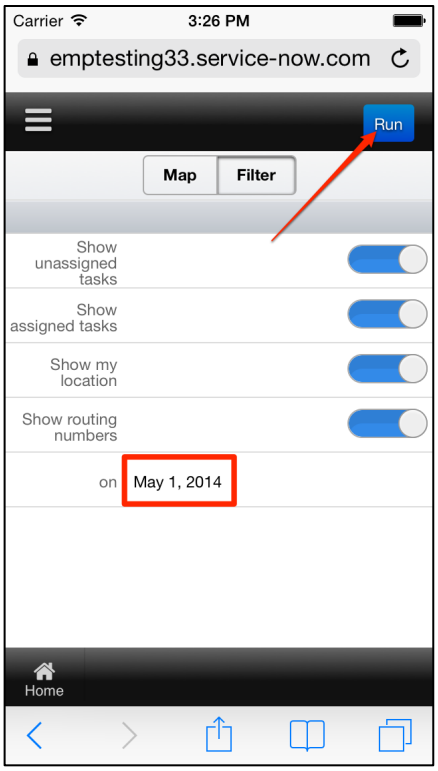




©2014 ServiceNow, Inc. All rights reserved.

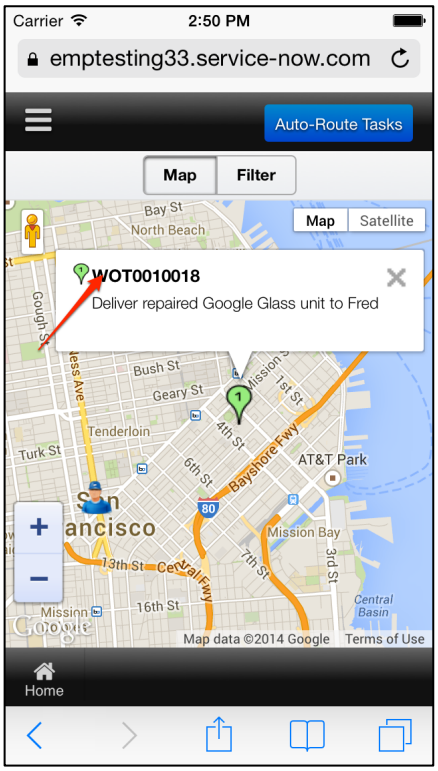
2. On the mobile map view, you may need to tap the **Filter** tab to set the **On** date to **May 1, 2014**. Tap **Run** to run the filter and re-display the map.

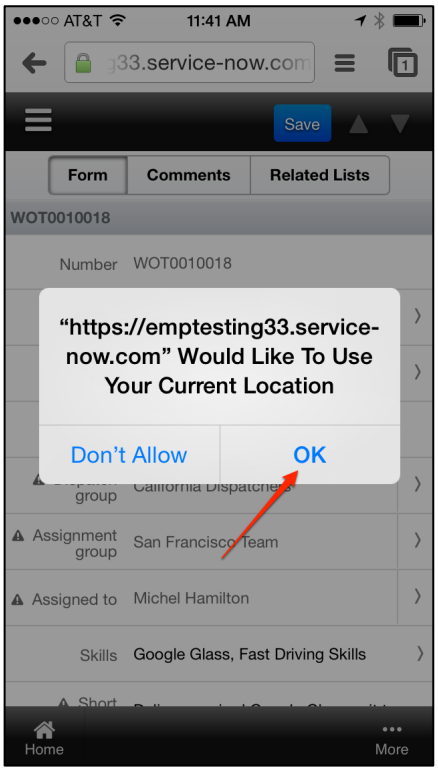




©2014 ServiceNow, Inc. All rights reserved.

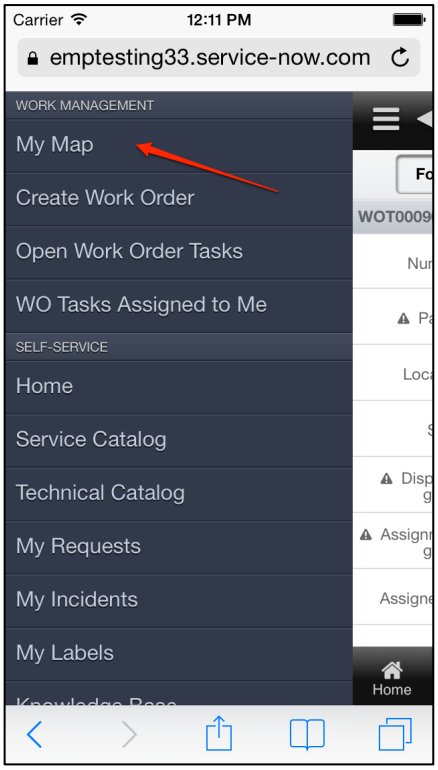
3. You should now see the remaining task for Michel – zoom and pan using your fingers for the optimal view. Tap on the map marker to see details for the final task. Tap the task number directly on the map to open the final task. Depending on your device settings, you may see a pop-up requesting to use your current location. Tap **OK**. Continue to complete the final task just as you did in Lab 7.

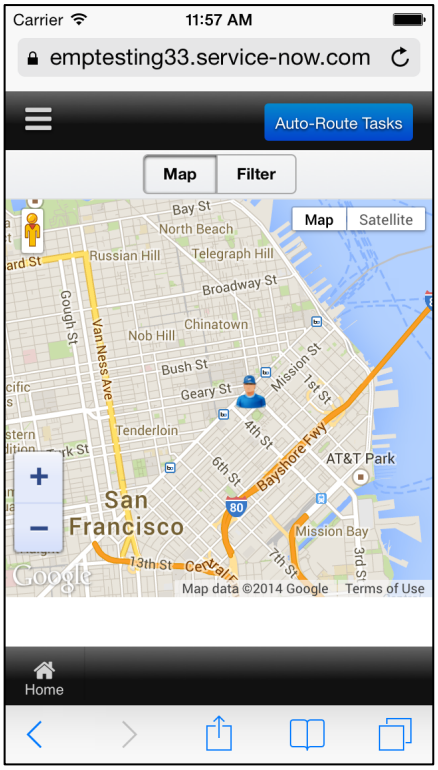




©2014 ServiceNow, Inc. All rights reserved.

4. After completing the final task, again navigate to **My Map**. On the mobile map view, notice that Michel's icon has moved from his prior location to the Moscone Center, where we are currently located.





Additional Work Management Resources

Work Management Wiki

https://wiki.servicenow.com/index.php?title=Work_Management

©2014 ServiceNow, Inc. All rights reserved.