knowledge14®

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Work Management

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ServiceNow

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servicenow®

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Work Management

Power Mobile Worker Productivity with Geolocation

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Presenter Introductions

- **Ben Hollifield**
  - Durham, NC
  - Beer brewer
  - Bread baker
  - Apparently really into carbohydrates



- **Melissa Moghaddam**
  - San Diego, CA
  - Full time driver (for kids)
  - Licensed baker/cook (for kids)
  - Interests in astronomy, physics, chemistry, health
  - Also a software developer



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Objectives

- Illustrate the purpose of Work Management in the enterprise and how Work Management fits into existing ITSM processes.
- Guide users through the Work Management work streams of creator, dispatcher, and agent.
- Illustrate how geolocation enhances productivity of the mobile workforce.

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Agenda

Work Management & Lab Overview

Work Orders & Models

Dispatching Work Order Tasks

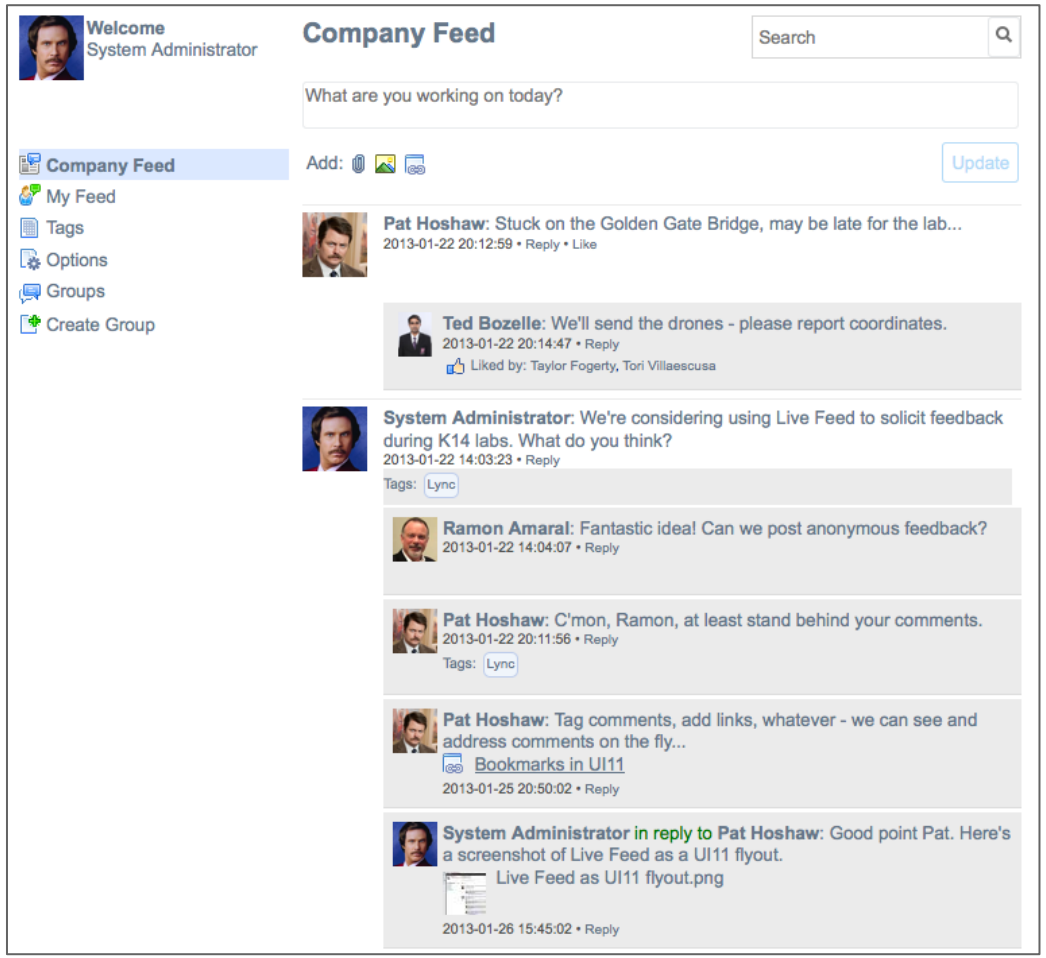
Completing Work Order Tasks

Mobile Geolocation

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Work Management K14 Live Feed

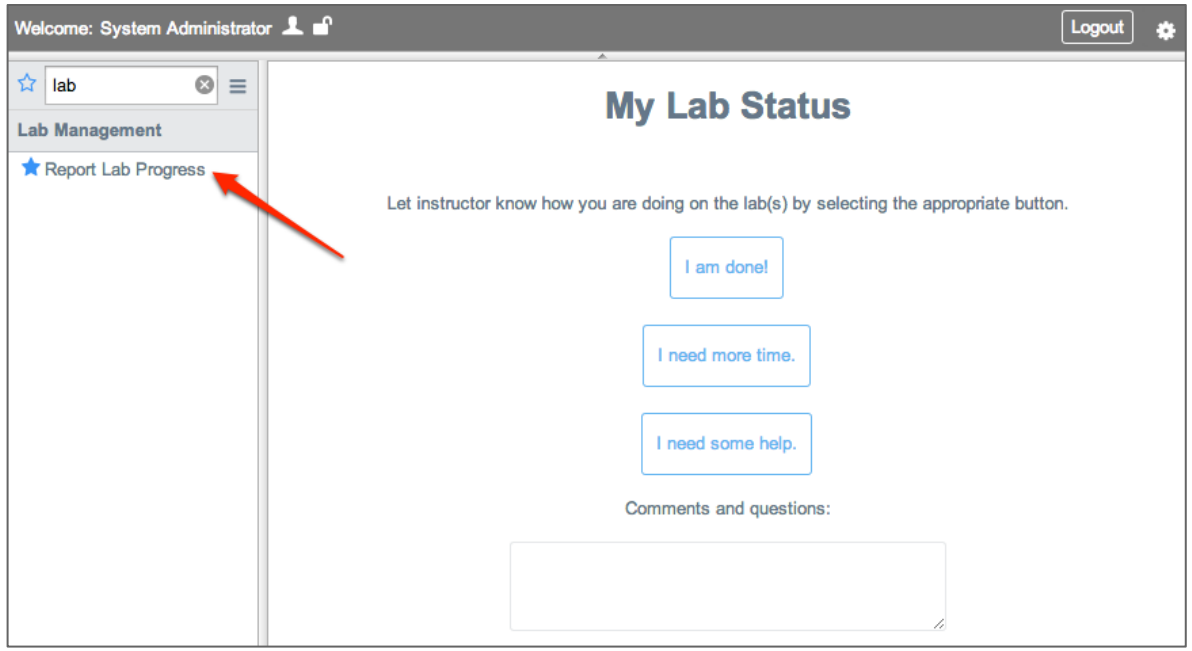
- We want to hear what you have to say!
- Post any comments / questions to the K14 Portal Live Feed Group: Work
- We'll check in periodically to address your feedback.



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Lab Progress Tracker

- Use the Lab Progress Tracker to help us monitor progress and adjust pace.
- Navigate to **Lab Management > Report Lab Progress** to report progress or comment on each lab.



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Audience Poll

- Does your organization currently utilize a work management solution?
- If so, is it ServiceNow or another?
- What benefits / struggles have you experienced?
- Is automated geolocation used as part of your existing solution?



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Why Work Management in ServiceNow?

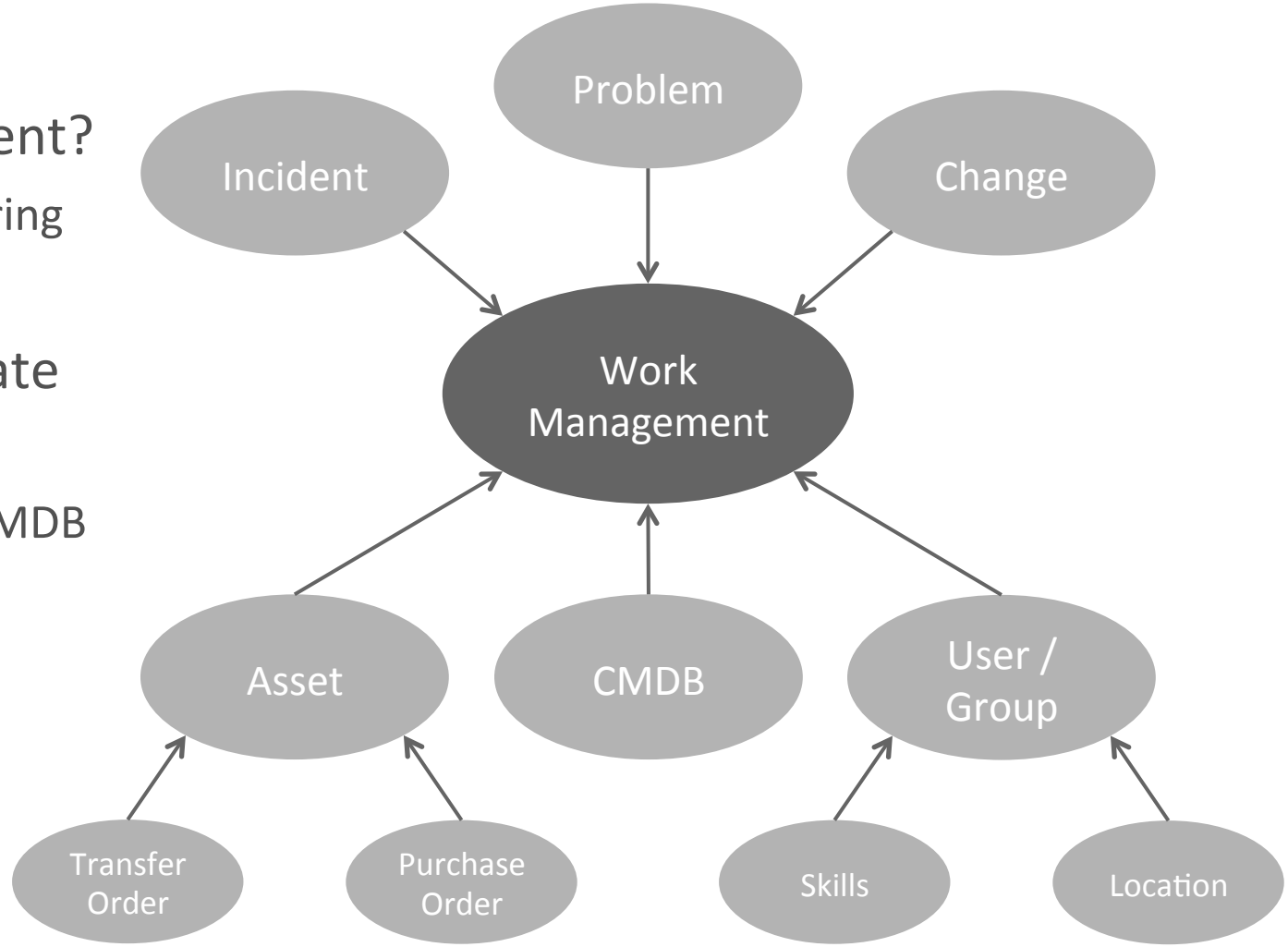
- Work Management is inextricably tied to existing ITSM processes:
  - Incident
  - Change Management
  - Asset / CMDB

- ServiceNow platform capabilities naturally fit the needs of Field Service teams:
  - Logical tasking structure w/ notifications, workflow & approvals
  - Role-based views & permissions
  - Mobile interface
  - Enhanced geolocation capabilities in Eureka

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Work Management Overview

- What is ServiceNow Work Management?
  - An application for management & monitoring of Field Services teams
- How does Work Management integrate with existing ServiceNow modules?
  - Ties to Incident/Change/Problem/Asset/CMDB
- What's new in Eureka?
  - Enhanced configurability
  - Geolocation



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Lab Overview

- If you attended K13, you remember Fred's Google Glass from his keynote.





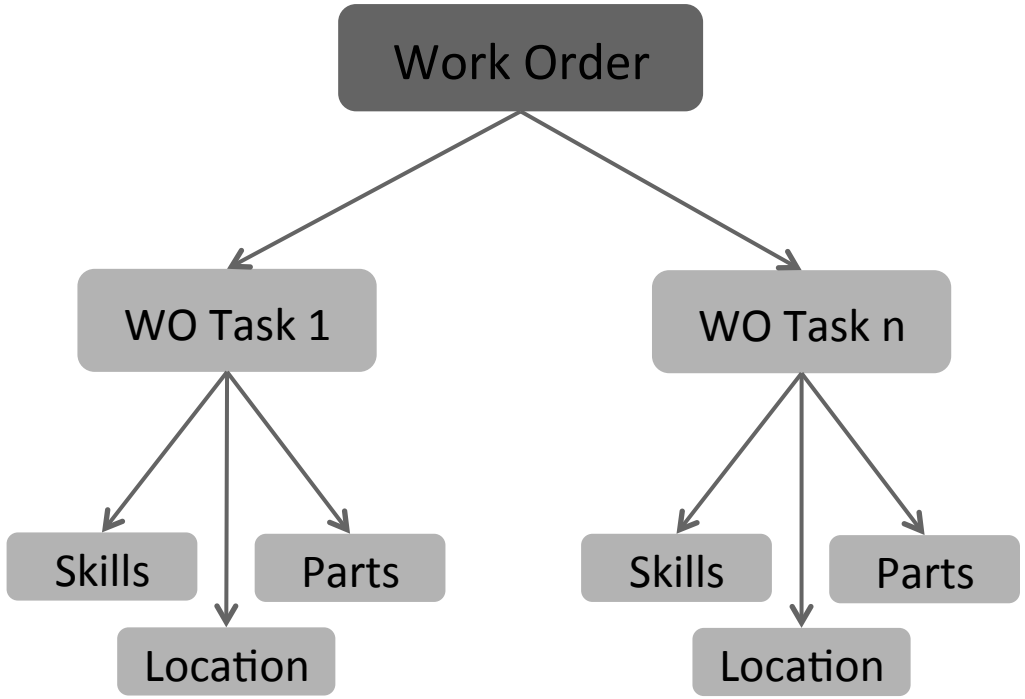
- He can't wait to use them again this year, but he broke them on the way to San Francisco. This happens a lot.

We need to dispatch field services to repair Fred's glasses before his K14 keynote!

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Work Orders & Work Order Tasks

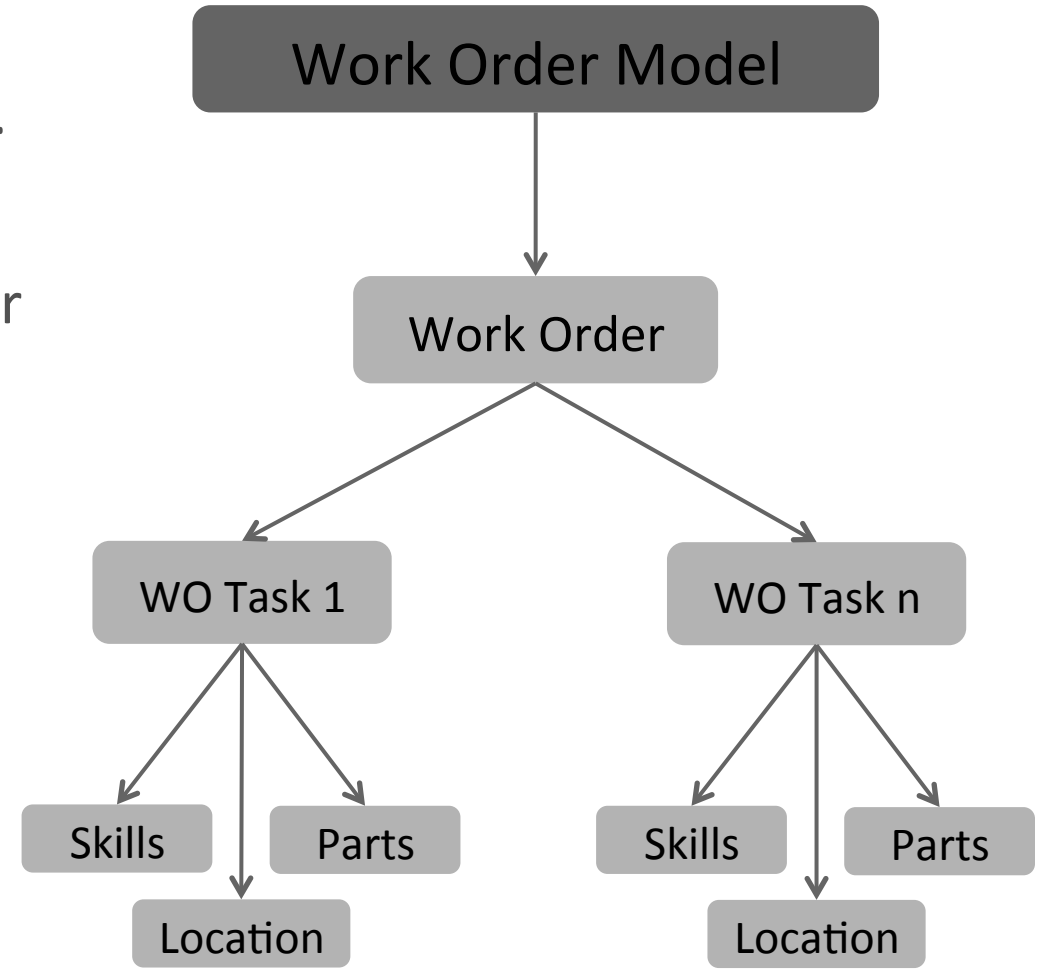
- A Work Order is the basic task container.
- Work Orders may include:
  - n # of Work Order Tasks
- Work Order Tasks may include:
  - Required skills per task
  - Requires parts per task
  - Location



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Work Order Models

- A Model is a re-usable Work Order ‘template’.
- Models can include any fields on a Work Order or Work Order Task record:
  - Populate those fields that repeat each time.
- Models enable rapid deployment of frequently requested Work Orders.

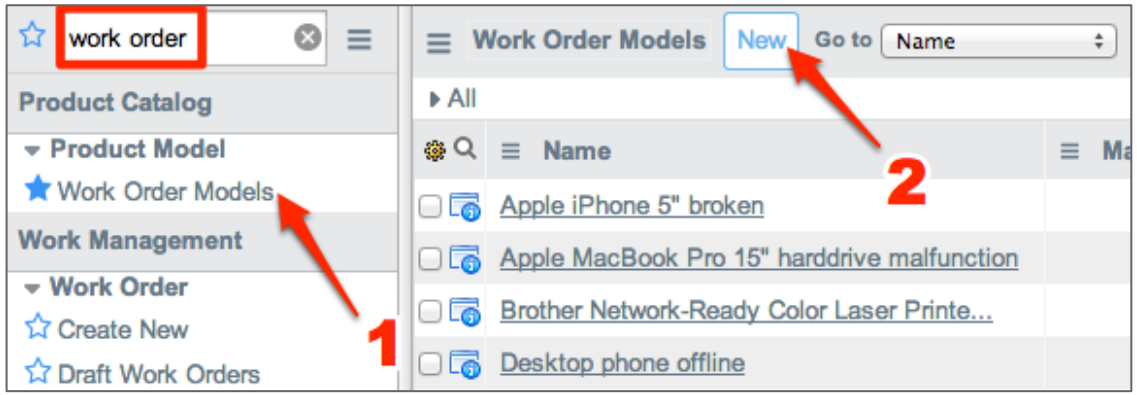


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Lab 1 (1/5)

Create a Work Order Model

Because Fred so often breaks his Google Glass, we're going to create a new Work Order Model to expedite requests in the future.



1. Navigate to **Product Catalog > Work Order**.

2. Click **New**.

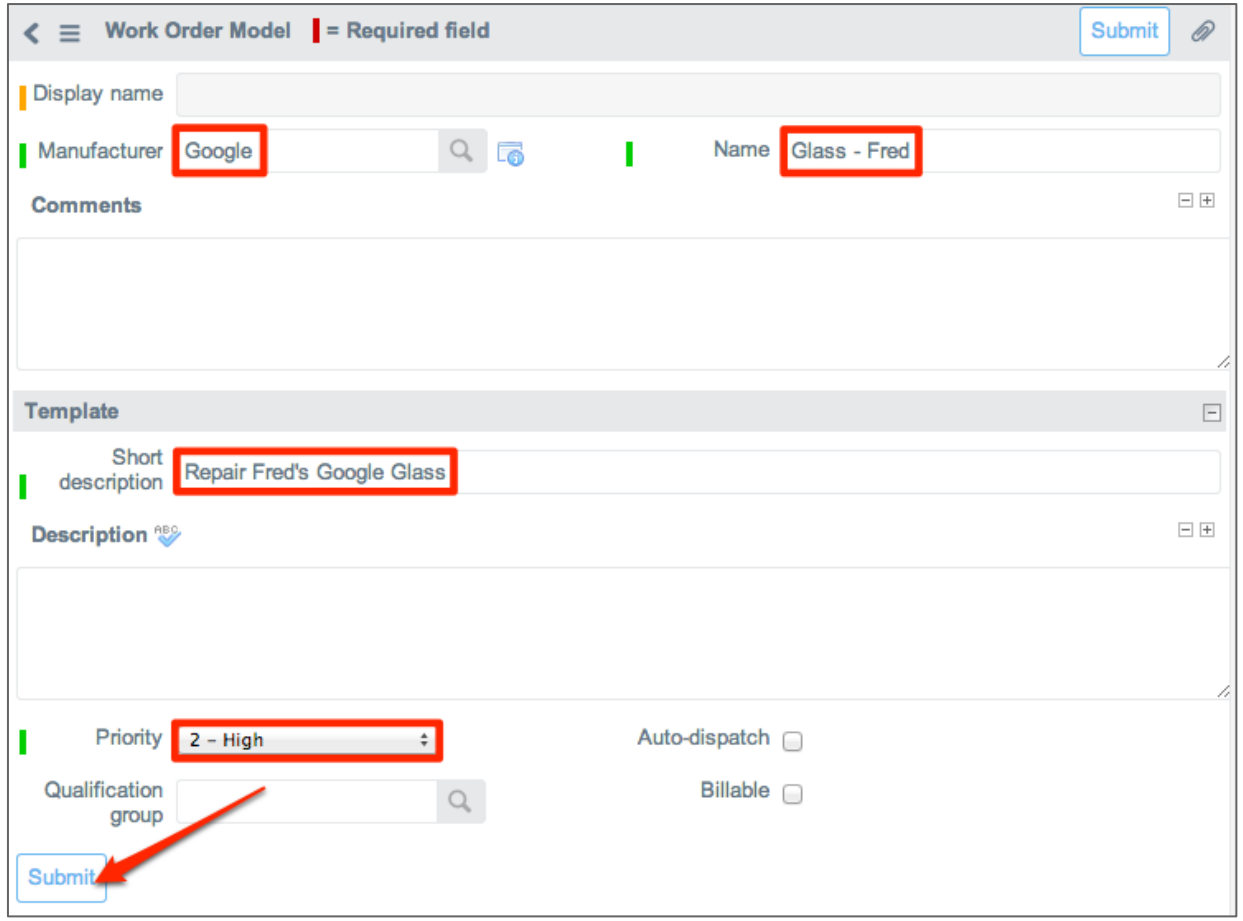
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Lab 1 (2/5)

Create a Work Order Model

- Fill out the Work Order Model form as shown in your lab guide:
  - *Manufacturer*: Google
  - *Name*: Glass – Fred
  - *Short Description*: Repair Fred's Google Glass
  - *Priority*: 2 – High

- Click **Submit**.

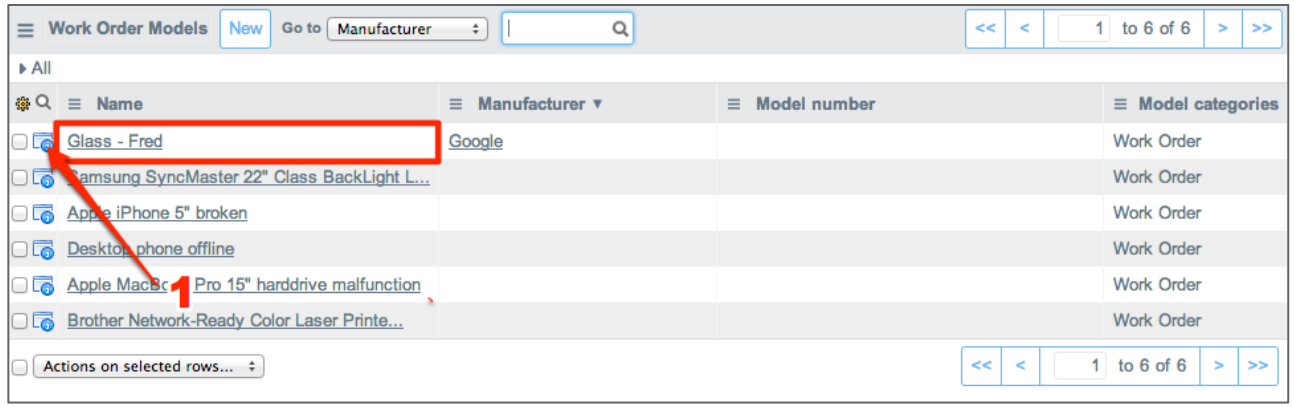


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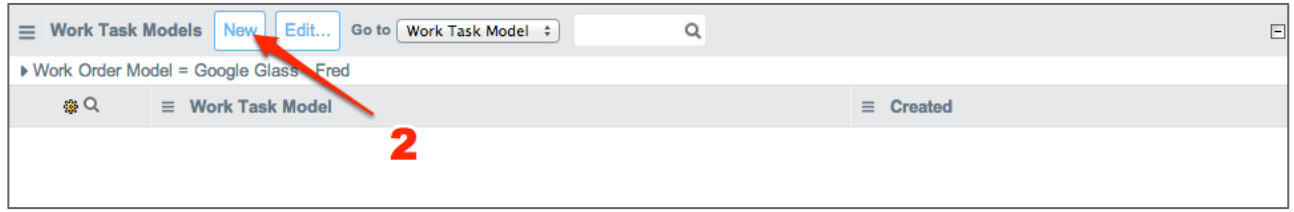
Lab 1 (3/5)

Create a Work Order Model

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



2. On your new model scroll to the **Work Task Models** related list at bottom and click **New**.



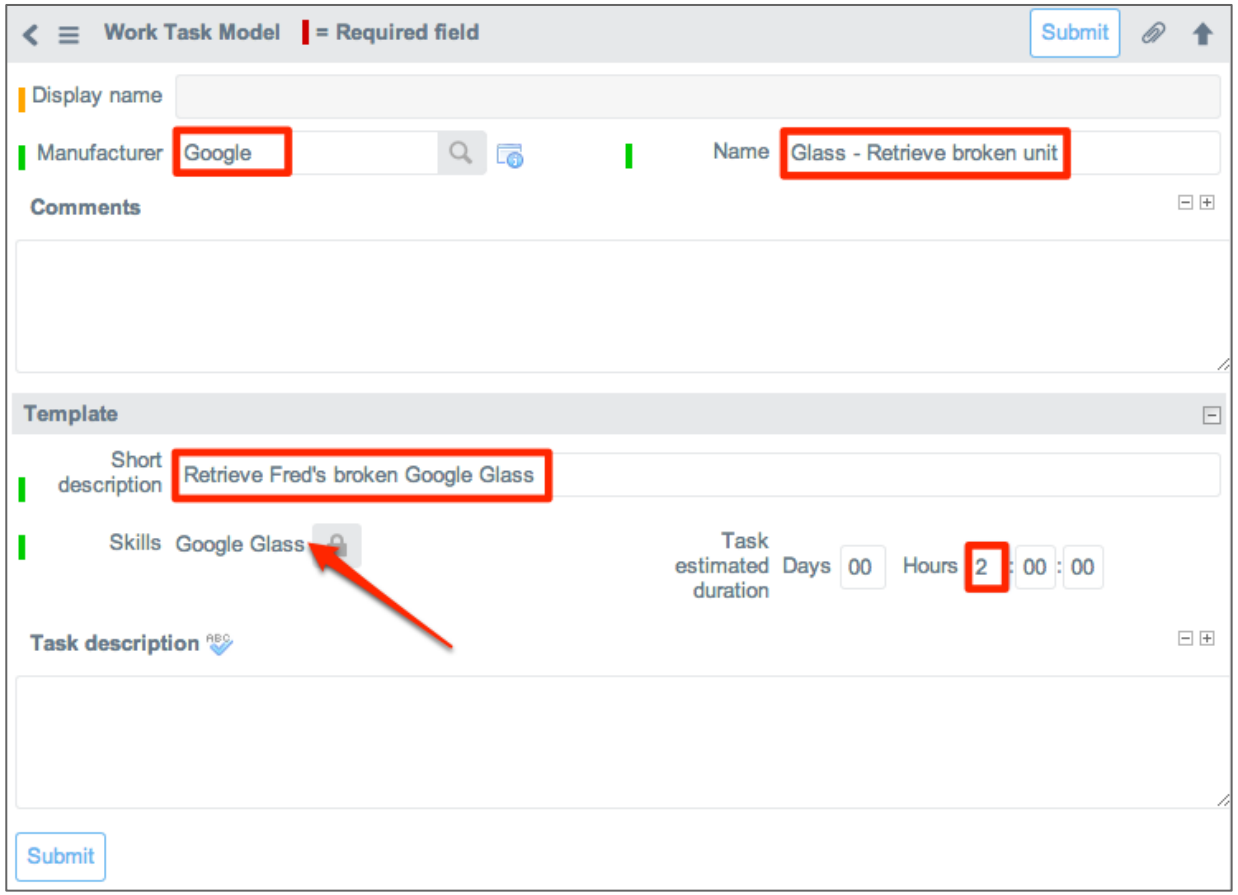
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Lab 1 (4/5)

Create a Work Order Model

- Fill out the Work Task Model form as shown in your lab guide and click **Submit**.

- Complete the process as shown in your lab guide to create a total of 3 Work Task Models.

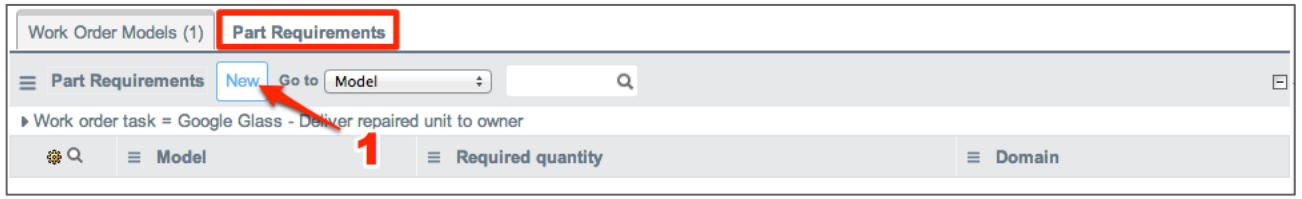


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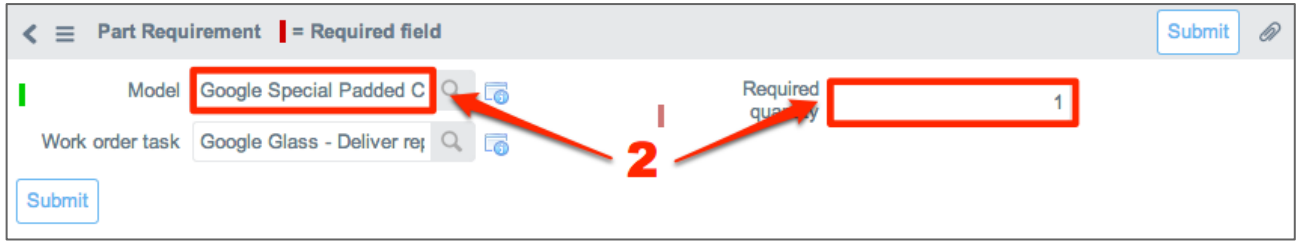
Lab 1 (5/5)

Create a Work Order Model

Bonus: For the final Work Task Model, we need to add a required **Google Special Padded Case** to protect the repaired Google Glass.



1. At the bottom of the final Work Task Model form, click **New** on the **Part Requirements** related list.



2. Complete as shown and click **Submit**.

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Roles in Work Management

Creator

Can create draft Work Orders

- Given to most process users
- Cannot move Work Orders out of 'draft' state

Qualifier

Can qualify Work Orders and make dispatch-ready

- Adds detail, schedules, parts, skills, and other definition to Work Orders

Combined for lab (configurable)

Dispatcher

Can dispatch Work Orders to field service agents

- Assigns qualified Work Orders to the field service team
- Uses maps, skill profiles, and parts availability to assign work

Agent

Can complete Work Orders

- Works & completes Work Orders
- Uses maps and forms to travel to and work tasks
- Can use mobile or desktop interfaces

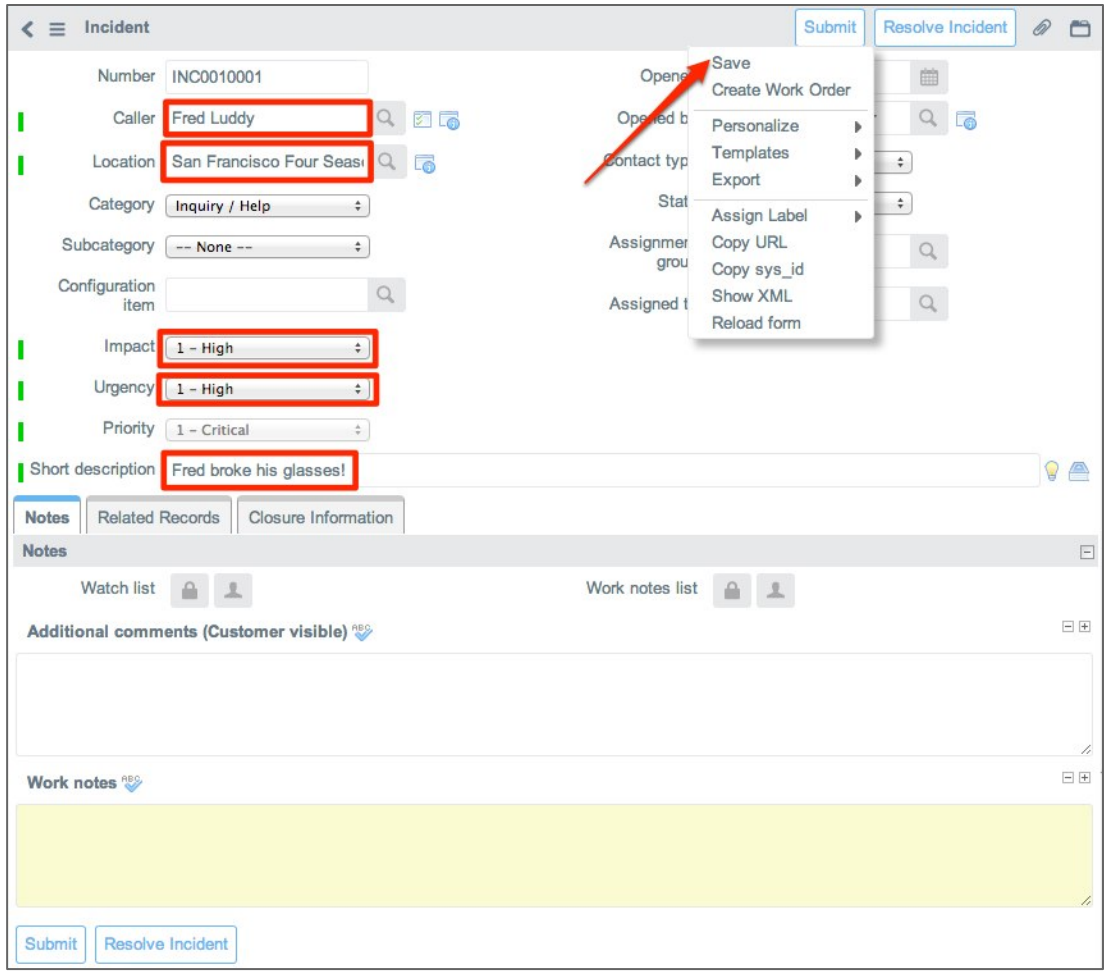
Work Management Roles

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Lab 2 (1/8)

Create a Work Order

- Navigate to **Incident > Create New**.
- Complete the Incident form as shown in your lab guide.
- Right click the form header and click **Save**.



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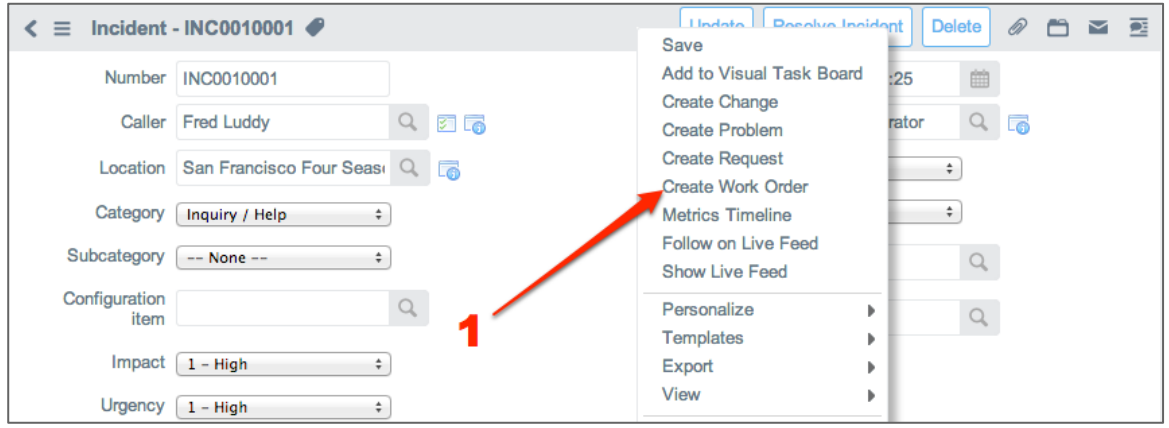
Lab 2 (2/8)

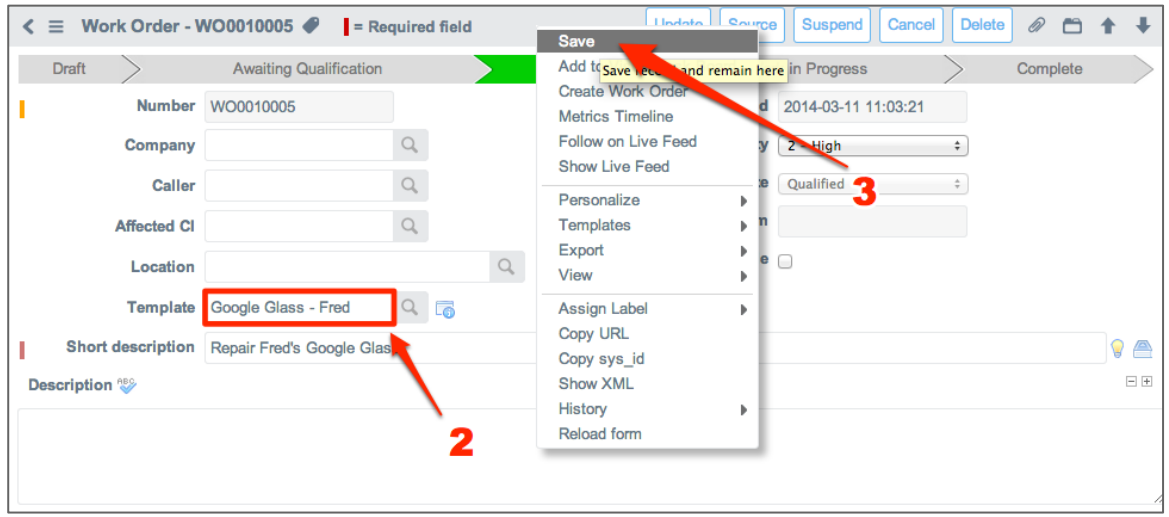
Create a Work Order

1. Right click the Incident header and click **Create Work Order**.

2. In the generated Work Order, enter the name of our template, **Google Glass – Fred**, in the **Template** field.

3. Right click the Work Order header and click **Save**.





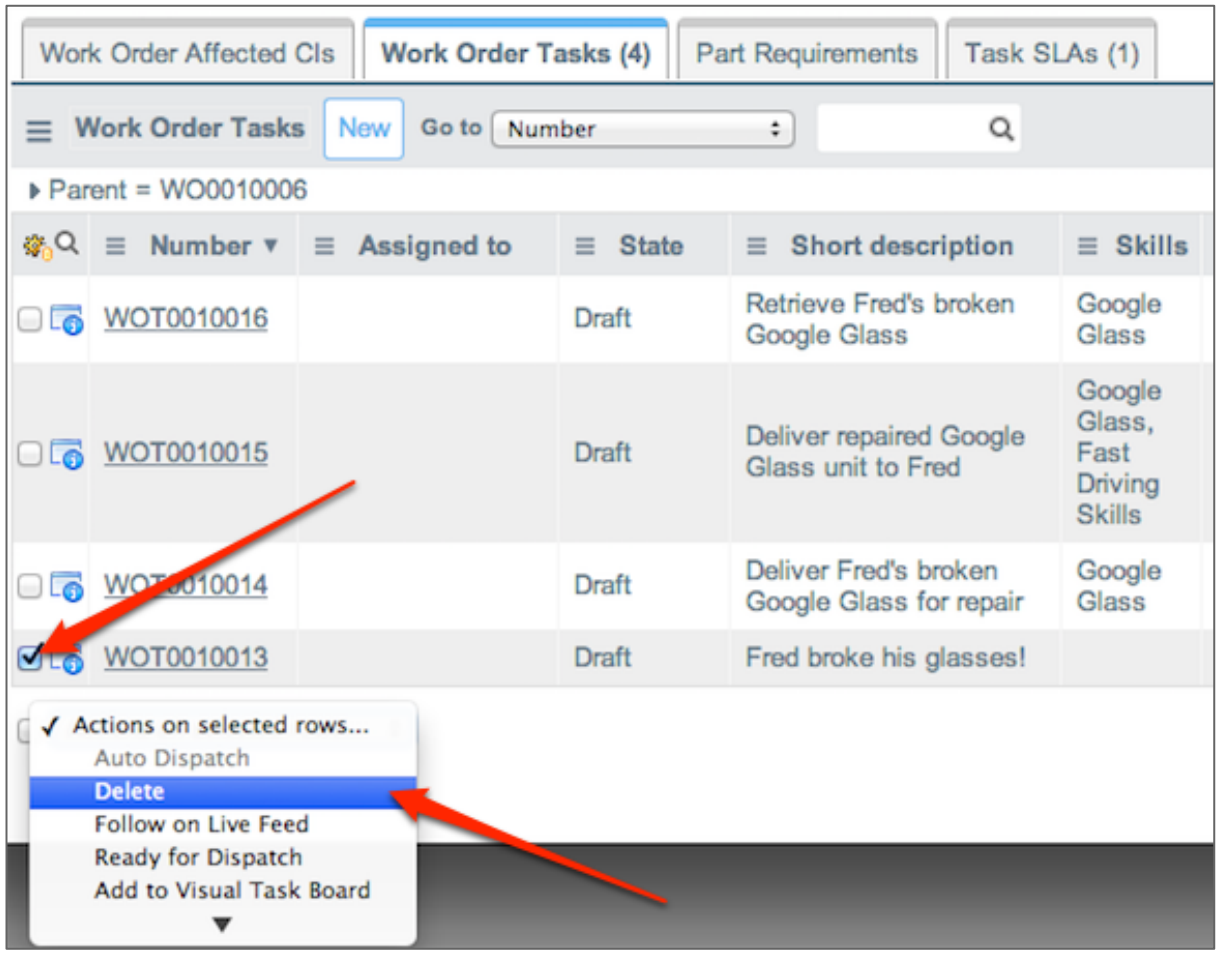
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Lab 2 (3/8)

Create a Work Order

- After the template is applied, you should notice 4 tasks in the **Work Order Tasks** related list at bottom.

- Find the the 4th auto-created default Work Order Task and **Delete** it.

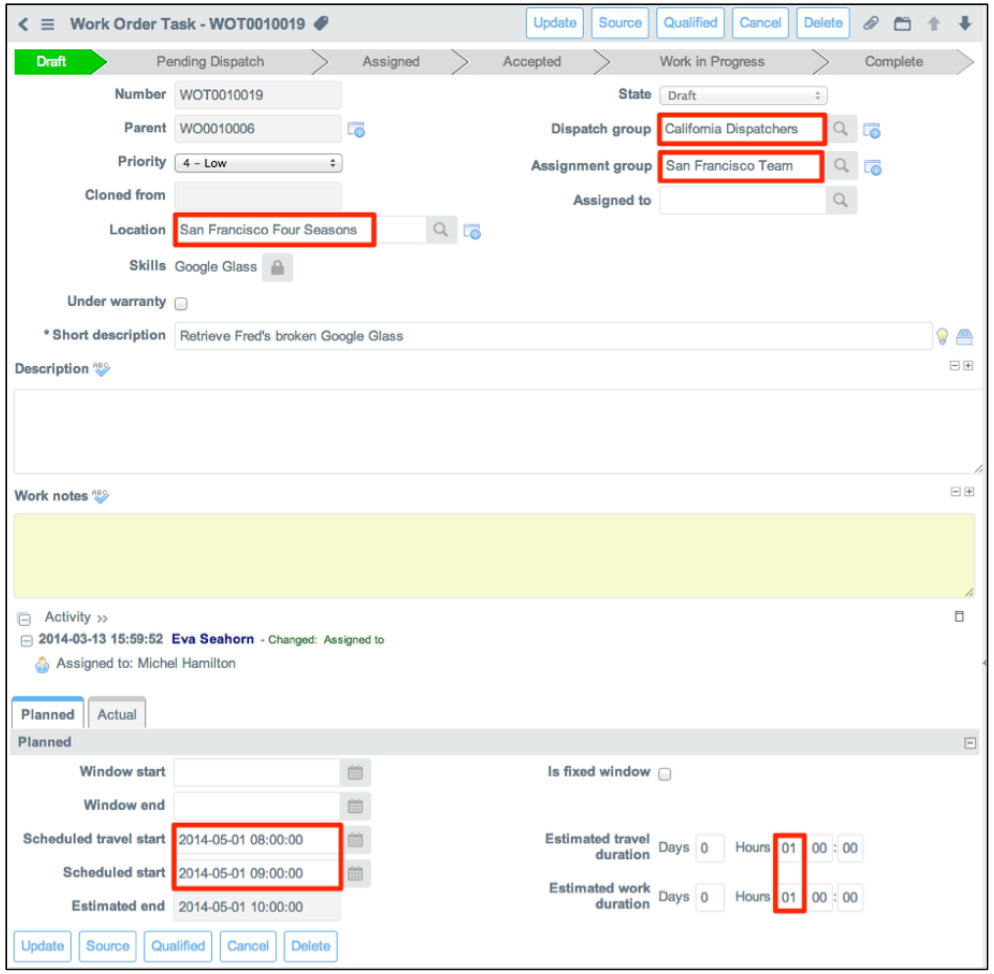


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Lab 2 (4/8)

Create a Work Order

- We need to add some detail to the tasks for this particular Work Order.
- Still on the **Work Order Tasks** related list, click on the first task, **Retrieve Fred's Broken Google Glass**.
- Complete the additional fields as shown in your lab guide and click **Update**.



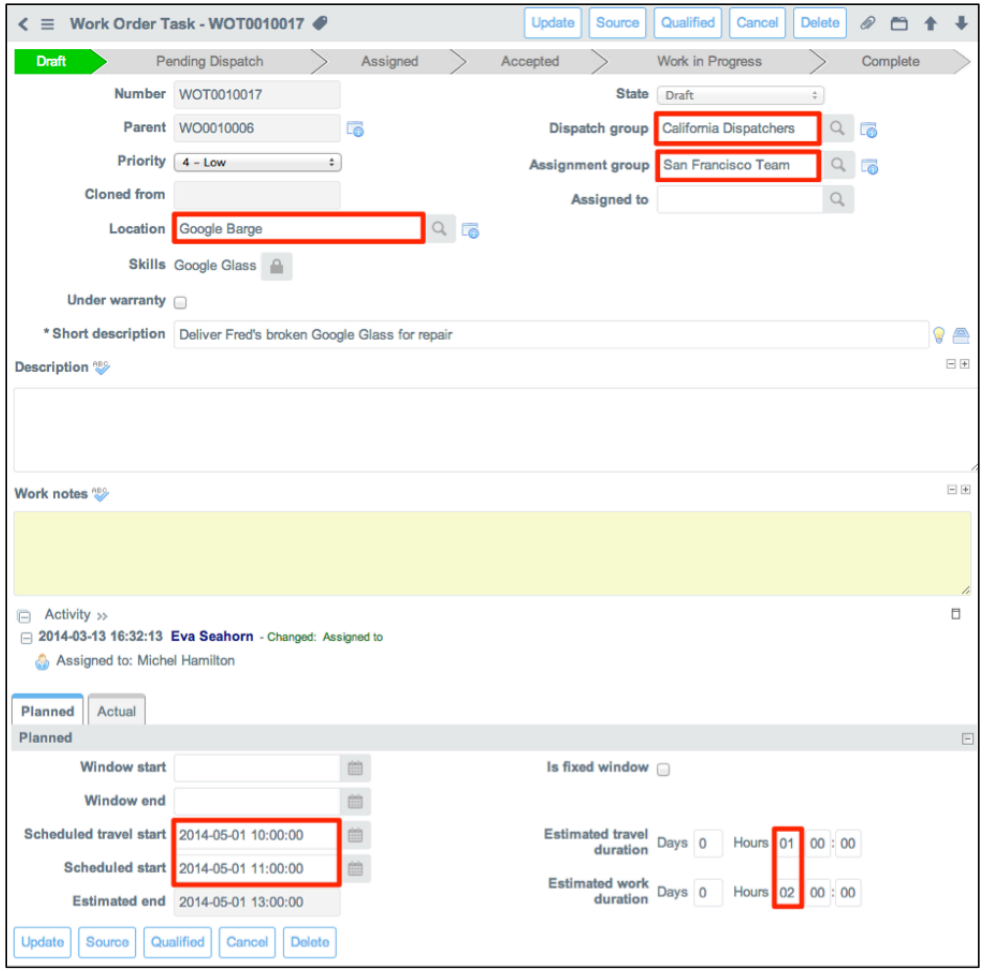
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Lab 2 (5/8)

Create a Work Order

- Do the same for the 2nd task, **Deliver Fred's broken Google Glass for repair**, completing the task according to your lab guide.

- For this task, we also need to account for the fact that we can't deliver the broken Google Glass unit until we first pick it up from Fred. In other words, the 2nd task *depends on* the 1st task.

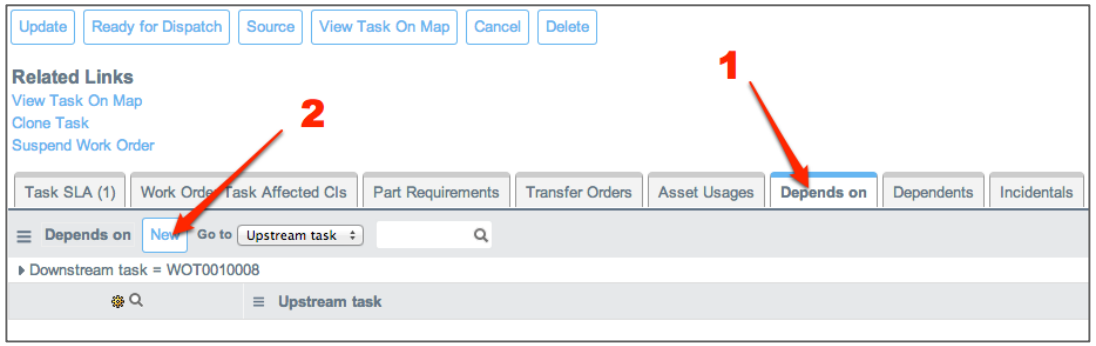


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Lab 2 (6/8)

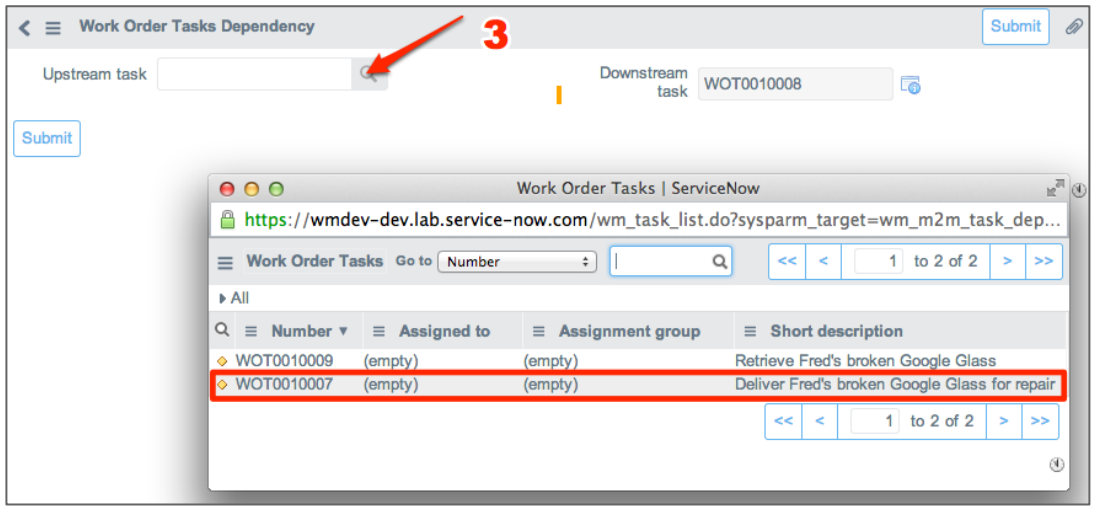
Create a Work Order

1. At the bottom of the 2nd task, **Deliver Fred's broken Google Glass for repair**, navigate to the **Depends On** related list.



2. Click **New**.

3. Click the icon next to **Upstream task** and set the 1st task as the dependency.



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Lab 2 (7/8)

Create a Work Order

- Continue to add details and dependencies to each Work Order Task as shown in your lab guide. Details for each task are shown here.

1 - Retrieve Fred's broken Google Glass
Location: San Francisco Four Seasons
Dispatch group: California Dispatchers
Assignment group: San Francisco Team
Scheduled travel start: 2014-05-01 08:00:00
Scheduled start: 2014-05-01 09:00:00
Estimated travel duration: 1 Hour
Estimated work duration: 1 Hour

2 - Deliver Fred's broken Google Glass for repair
Location: Google Barge
Dispatch group: California Dispatchers
Assignment group: San Francisco Team
Scheduled travel start: 2014-05-01 10:00:00
Scheduled start: 2014-05-01 11:00:00
Estimated travel duration: 1 Hour
Estimated work duration: 2 Hours
Depends On: Task 1

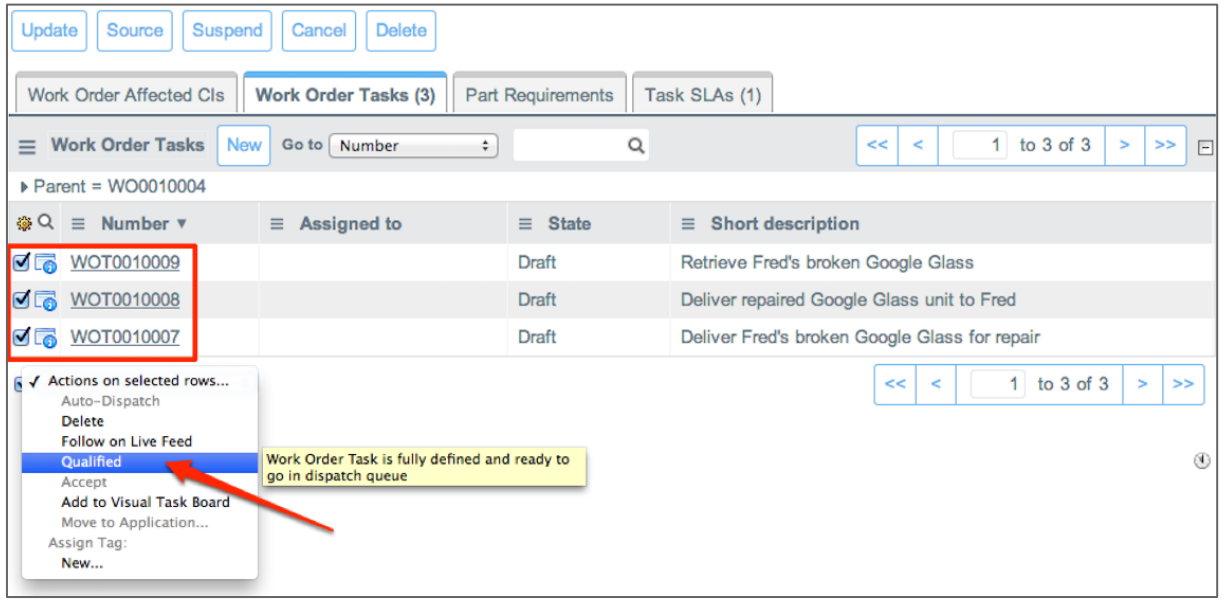
3 - Deliver repaired Google Glass unit to Fred
Location: Moscone Center
Dispatch group: California Dispatchers
Assignment group: San Francisco Team
Scheduled travel start: 2014-05-01 13:00:00
Scheduled start: 2014-05-01 14:00:00
Estimated travel duration: 1 Hour
Estimated work duration: 1 Hour
Depends On: Task 2

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Lab 2 (8/8)

Create a Work Order

- Now that all of our tasks are fully qualified, we can prepare them for dispatch.
- Back on the Work Order form, scroll to the **Work Order Tasks** related list.
- Select all 3 Work Order Tasks and click **Qualified**.



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Qualifier

Can qualify Work Orders and make dispatch-ready

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Dispatcher

Can dispatch Work Orders to field service agents

- Assigns qualified Work Orders to the field service team
- Uses maps, skill profiles, and parts availability to assign work

Agent

Can complete Work Orders

- Works & completes Work Orders
- Uses maps and forms to travel to and work tasks
- Can use mobile or desktop interfaces

Work Management Roles

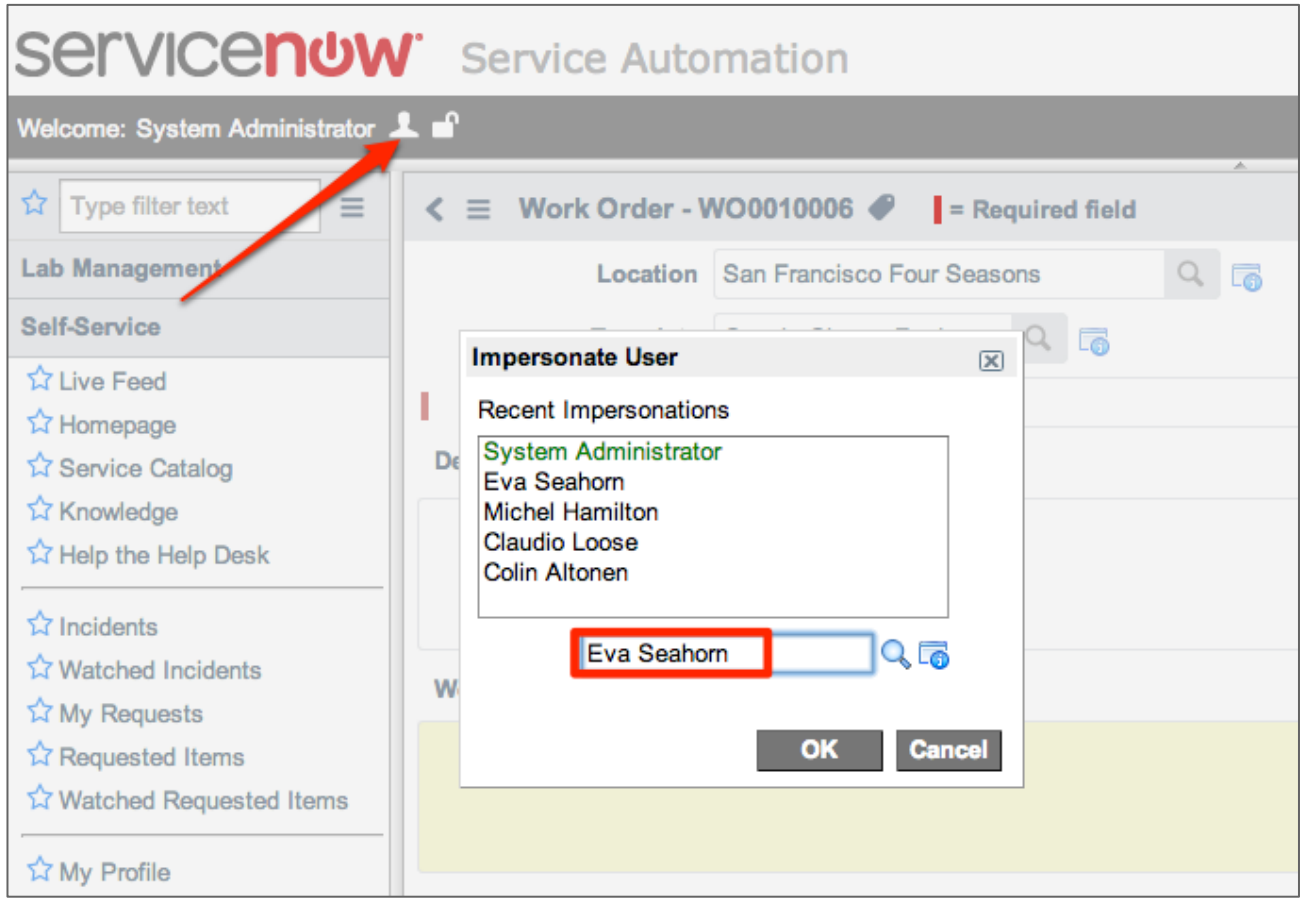
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Lab 3 (1/6)

Use the Dispatch Map

- Using the **Impersonate** icon in the header, impersonate user **Eva Seahorn**.

- Eva has the role of ‘Dispatcher’.

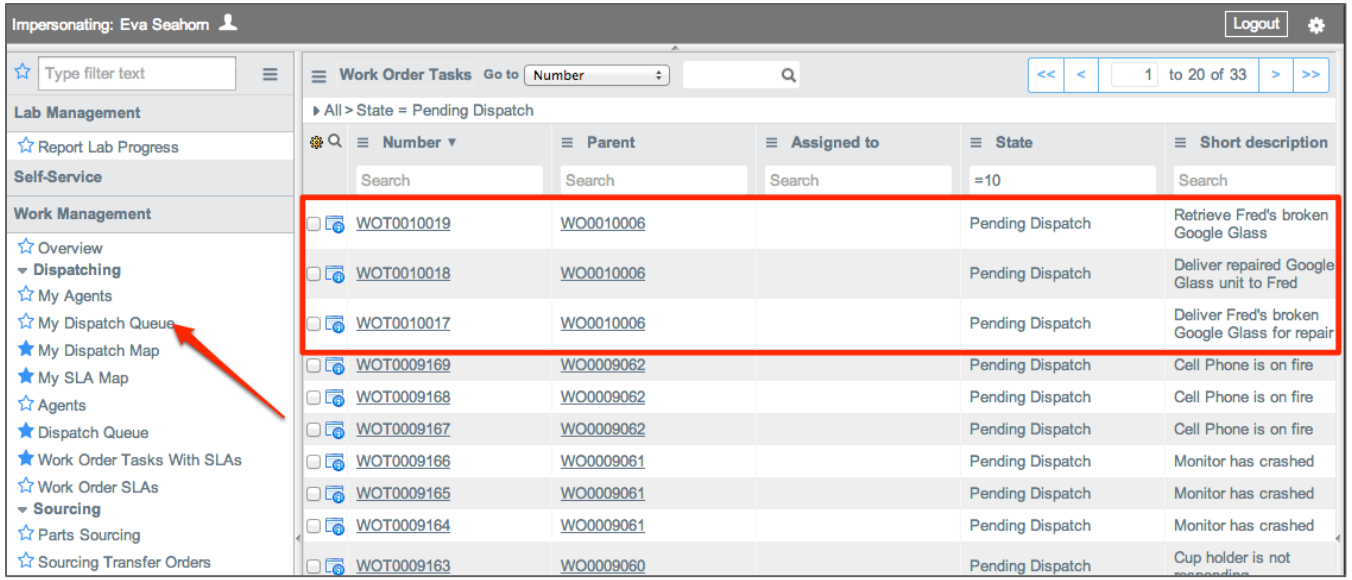


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Lab 3 (2/6)

Use the Dispatch Map

- Navigate to **Work Management > My Dispatch Queue** in the left nav.
- You should see the 3 Work Order Tasks that we created.
- Let's explore the different methods by which Eva can dispatch the tasks.



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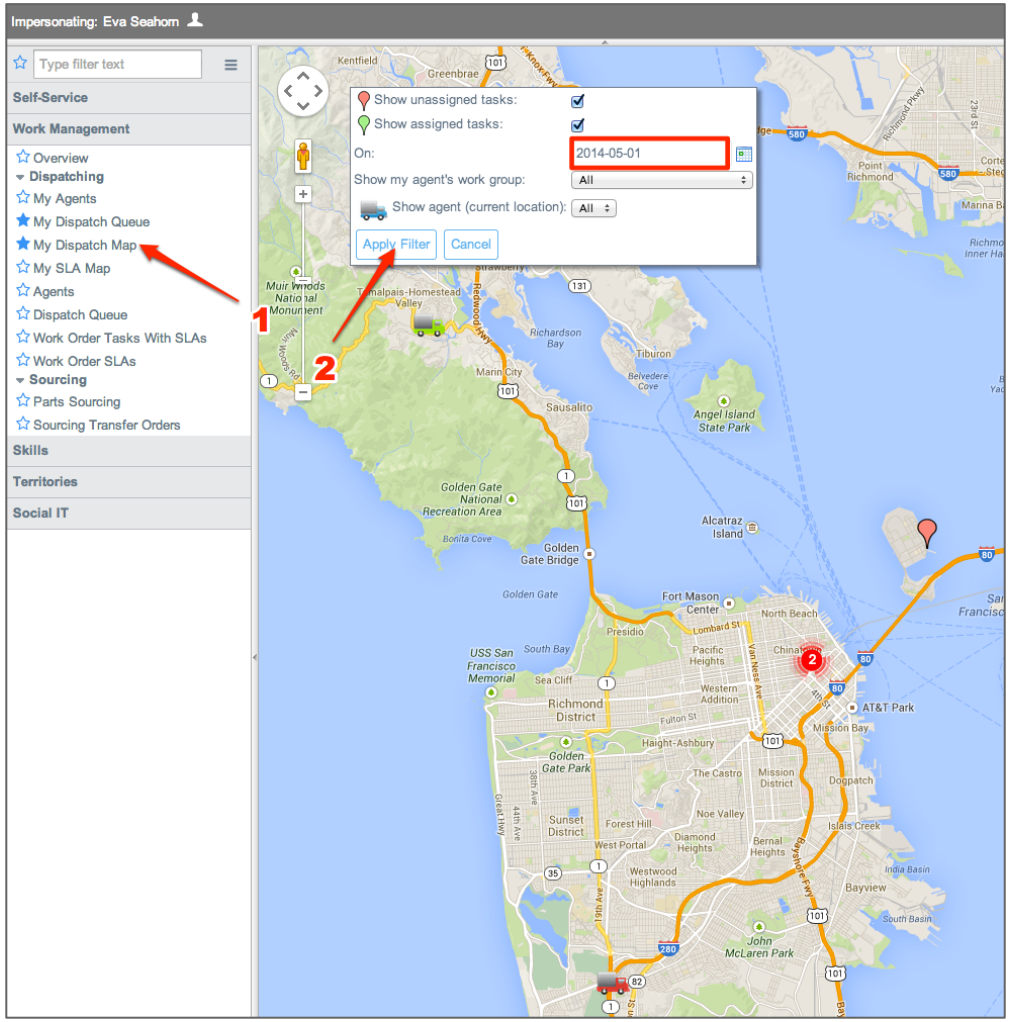
Lab 3 (3/6)

Use the Dispatch Map

1. Navigate to **Work Management > My Dispatch Map**.

2. Click **View Filter** in the top left of the map view and set the date to **2014-05-01**. Click **Apply Filter**.

3. You should see our active tasks and Field Service agents on the map.



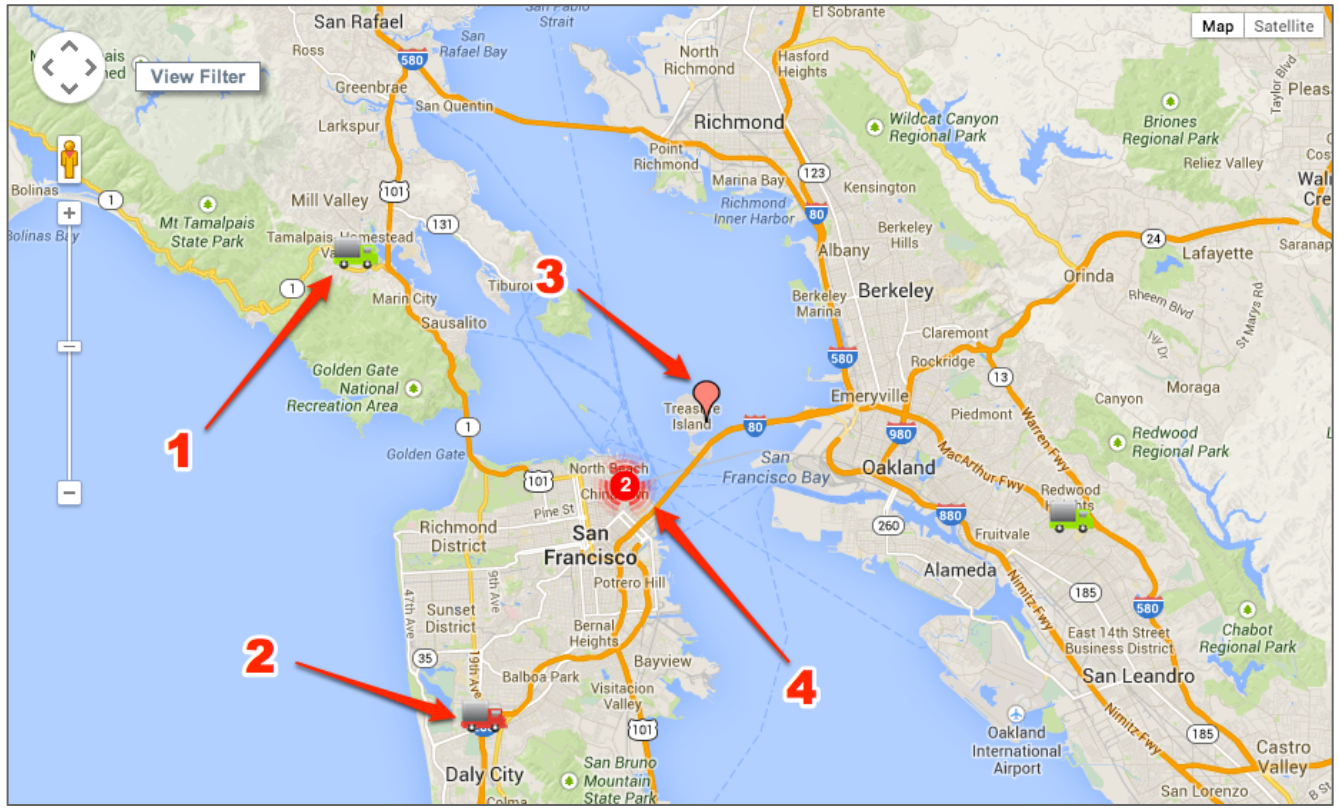
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Lab 3 (4/6)

Use the Dispatch Map

- A closer look at the map reveals detail of how data is displayed:

1. Green trucks are ‘on schedule’ agents.
2. Red trucks are ‘behind schedule’ agents.
3. Single tasks are represented by a normal map marker.
4. Multiple tasks in the same vicinity are represented by a circle w/ a number.



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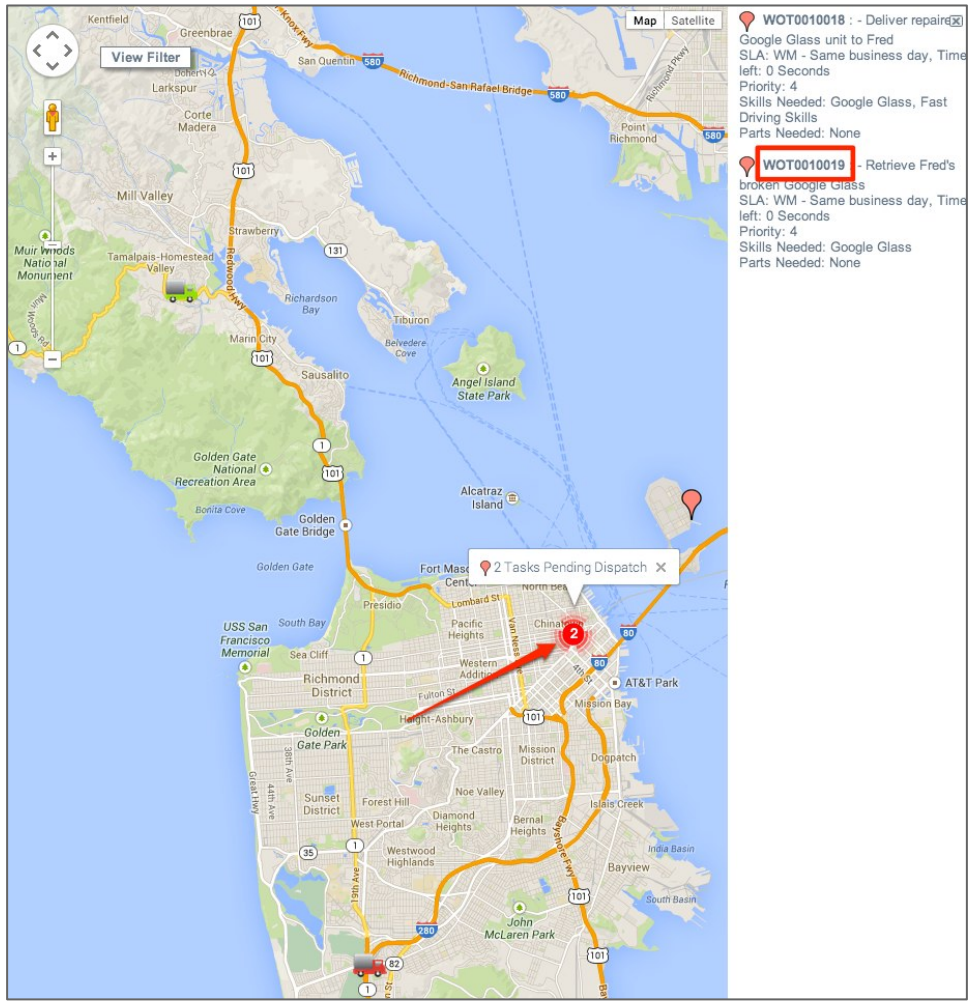
Lab 3 (5/6)

Use the Dispatch Map

- Click around to familiarize yourself with the map & agent locations.

- Click on the red circle with ‘2’. Click the pop-up label to display the 2 tasks in that area in the right sidebar.

- In the right sidebar, click the task number to open the task to **Retrieve Fred’s broken Google Glass**.

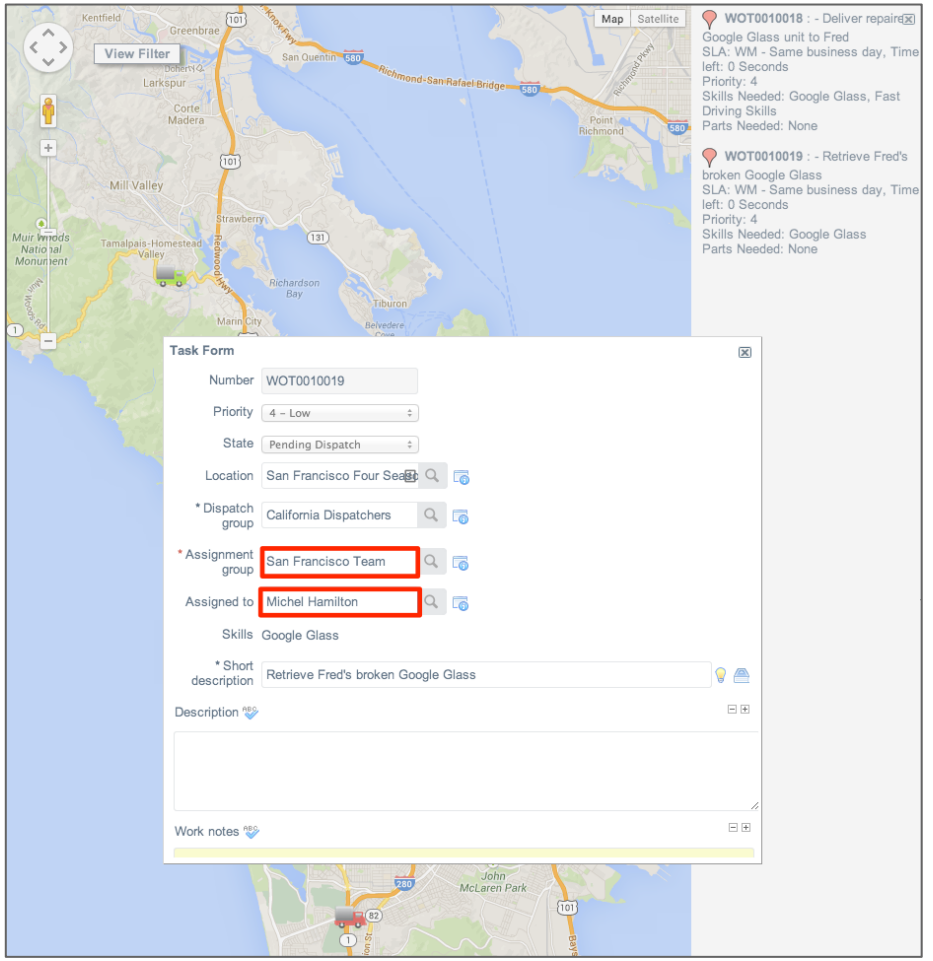


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Lab 3 (6/6)

Use the Dispatch Map

- Based on the agents' locations and schedules, Michel is the best agent for the job.
- In the task form overlay, assign the task to **Michel Hamilton**. Click **Update**.
- Back on the map, you can click on Michel's truck to see the task assigned.



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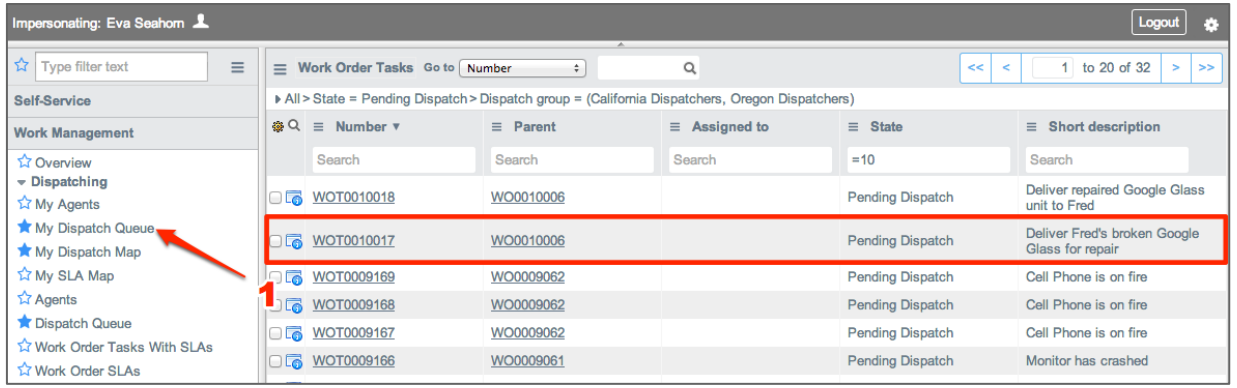
Lab 4 (1/2)

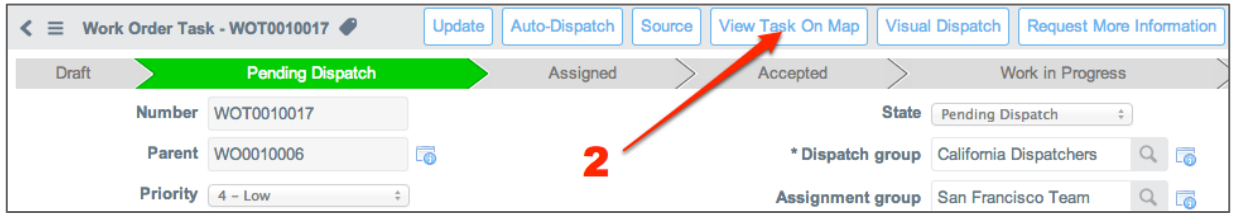
Use the Task Map View

Now let's try another dispatch method using the map.

1. Navigate to **Work Management > My Dispatch Queue** and click on the 2nd task to **Deliver Fred's broken Google Glass for repair**.

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



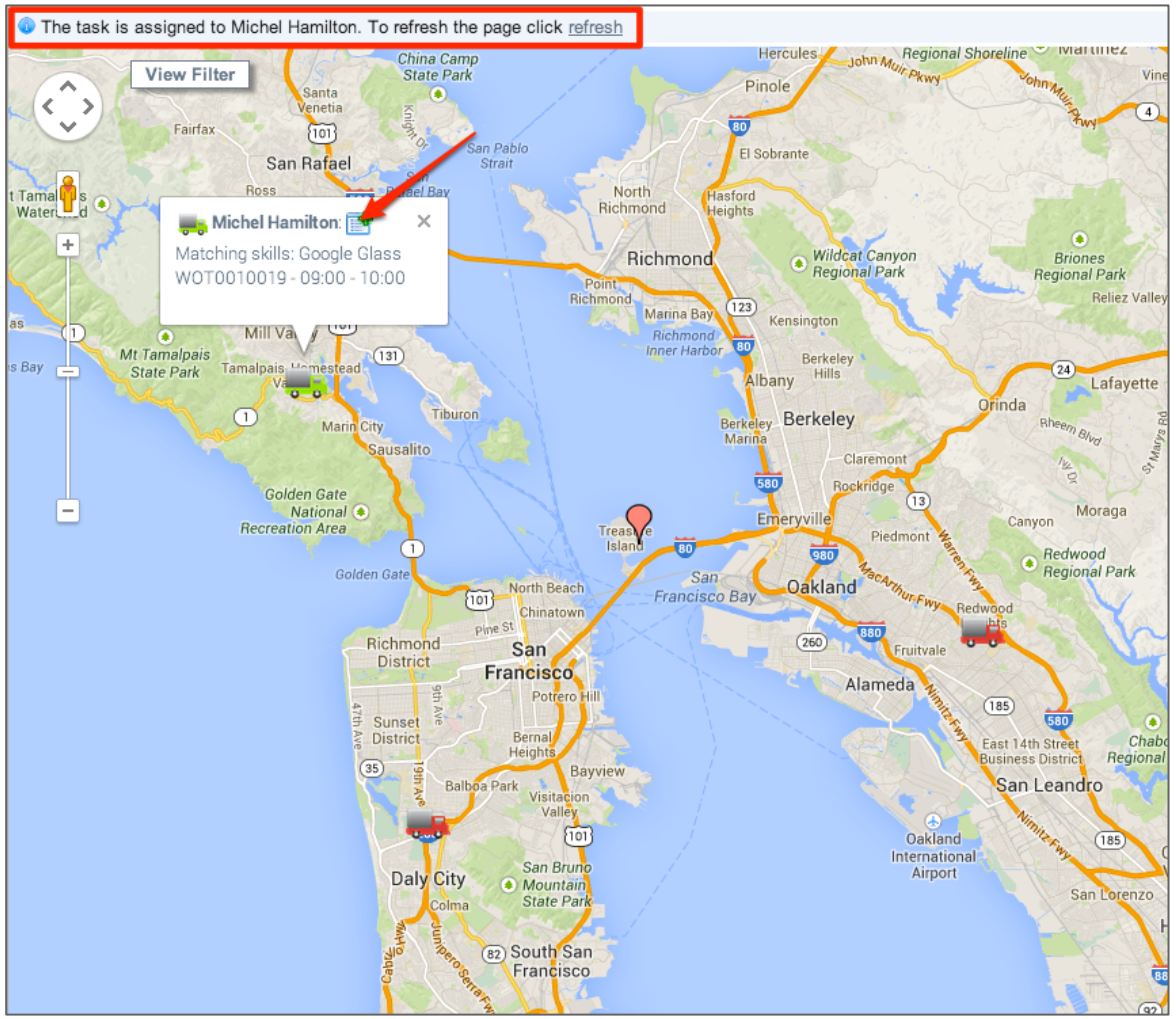


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Lab 4 (2/2)

Use the Task Map View

- On the map view, we can see that the 2 red trucks are behind schedule.
- Click the green truck belonging to Michel. In the pop-up, click the task icon beside Michel's name to assign the task.
- An info message will confirm the assignment.



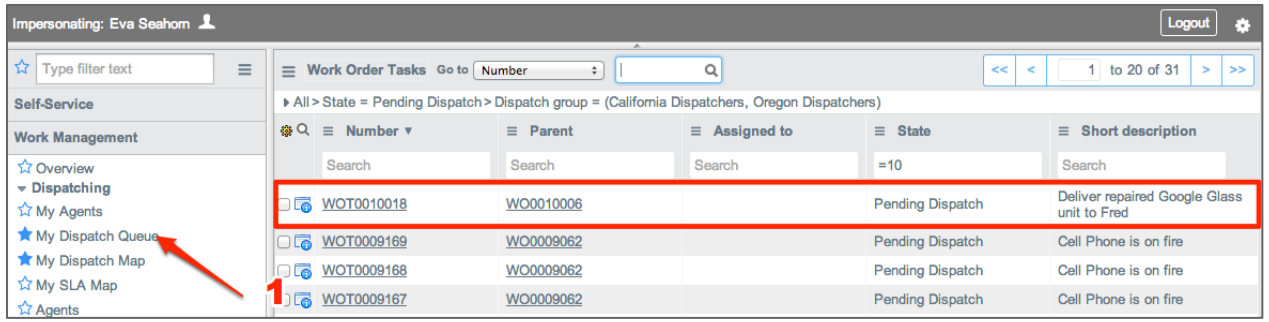
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Lab 5 (1/4)

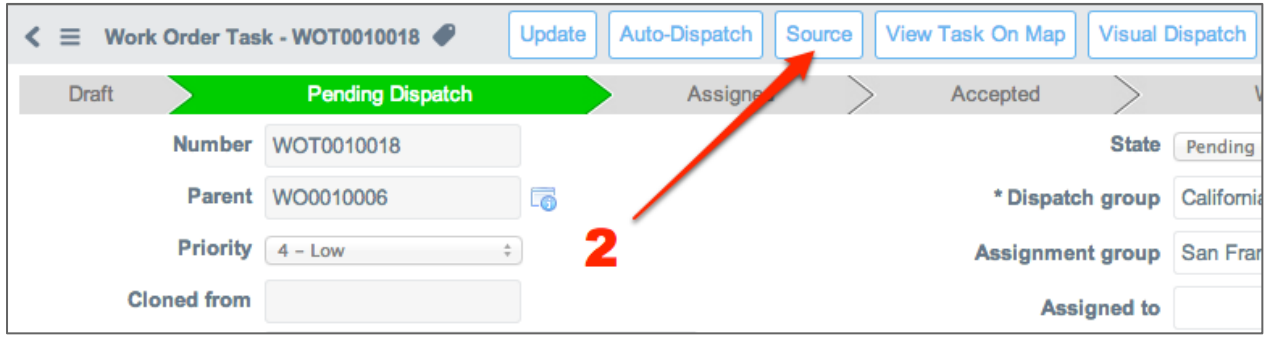
Use the Task Source Button

Now, let's explore a 3rd method to dispatch tasks without using the map.

1. Navigate to **Work Management > My Dispatch Queue** and click on the 3rd task to **Deliver repaired Google Glass unit to Fred**.



2. On the task header, click **Source**.



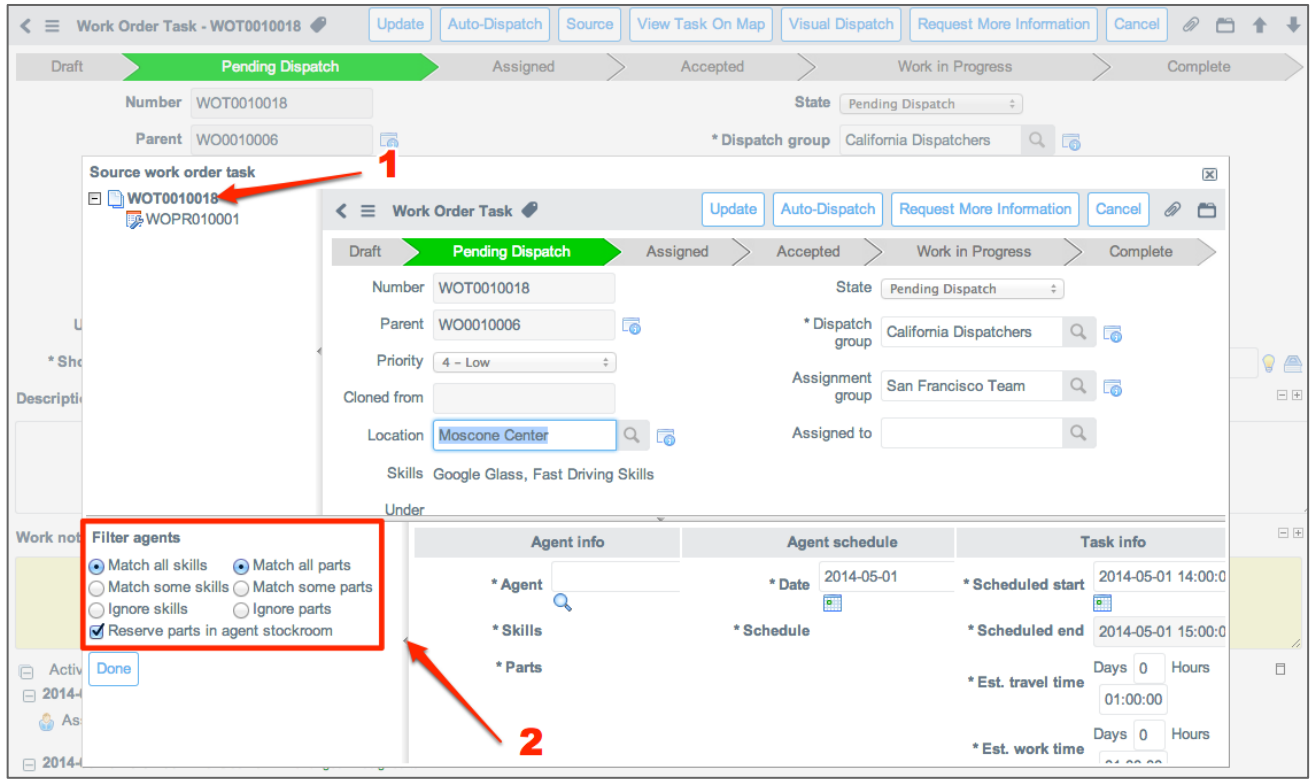
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Lab 5 (2/4)

Use the Task Source Button

1. In the pop-up, click the Work Order Task number in the top-left.

2. Click the small sidebar at the lower left to open filtering options. Notice the selected options to filter suitable agents.

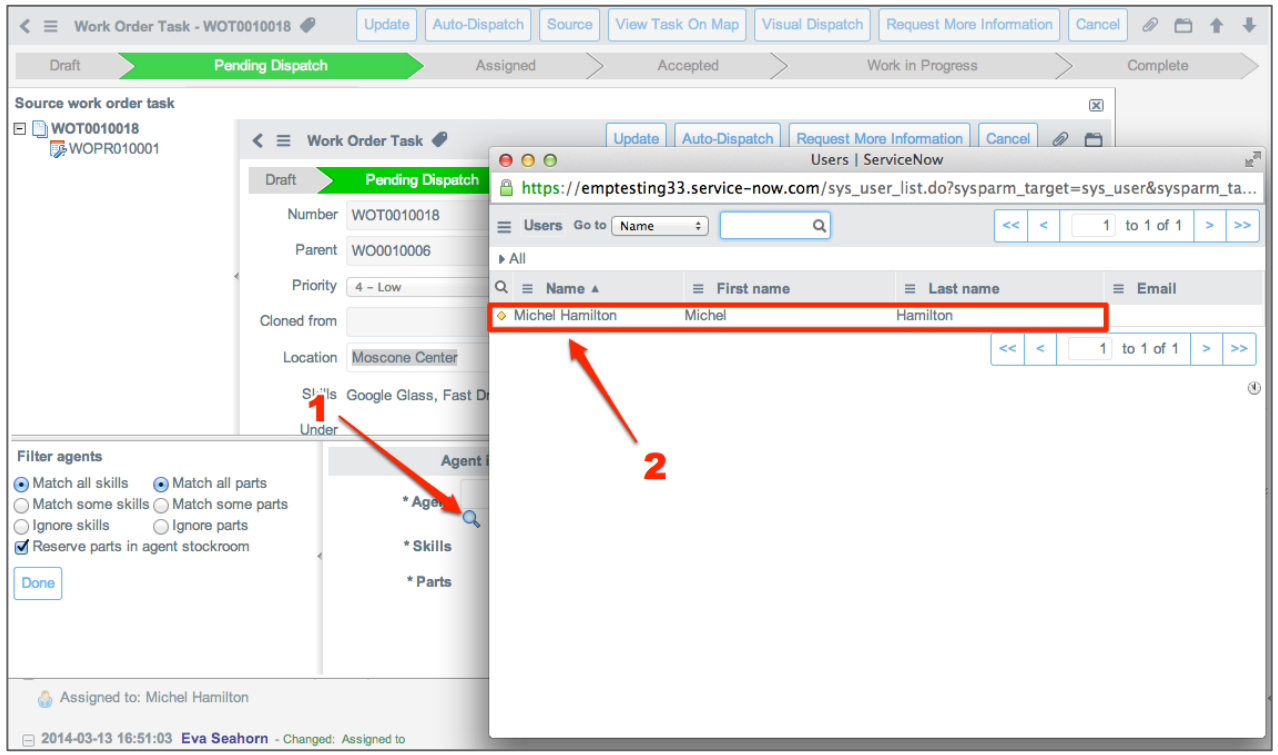


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Lab 5 (3/4)

Use the Task Source Button

Recall that our final task requires skills of **Google Glass** and **Fast Driving Skills**, as well as a part – **Google Special Padded Case**.



1. Click the search icon beside **Agent** to display a list of agents that have the required skills & part.

2. Click on **Michel Hamilton** to assign.

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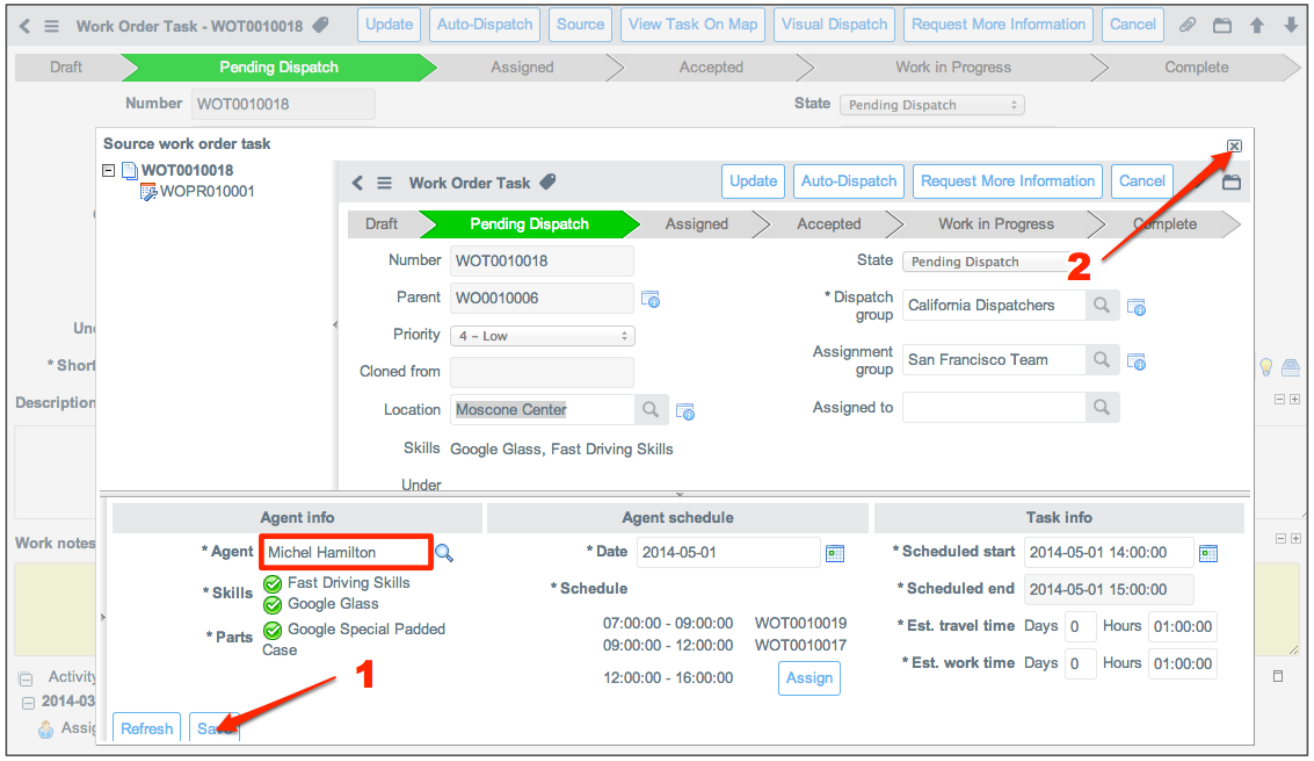
Lab 5 (4/4)

Use the Task Source Button

After selecting Michel, notice his Schedule, Skills, and Part auto-populated in the window.

1. Click **Save** to complete the assignment.

2. Click the **X** at top right to close the pop-up.



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Roles in Work Management

Creator

Can create draft Work Orders

- Given to most process users
- Cannot move Work Orders out of ‘draft’ state

Qualifier

Can qualify Work Orders and make dispatch-ready

- Adds detail, schedules, parts, skills, and other definition to Work Orders

Dispatcher

Can dispatch Work Orders to field service agents

- Assigns qualified Work Orders to the field service team
- Uses maps, skill profiles, and parts availability to assign work

Agent

Can complete Work Orders

- Works & completes Work Orders
- Uses maps and forms to travel to and work tasks
- Can use mobile or desktop interfaces

Work Management Roles

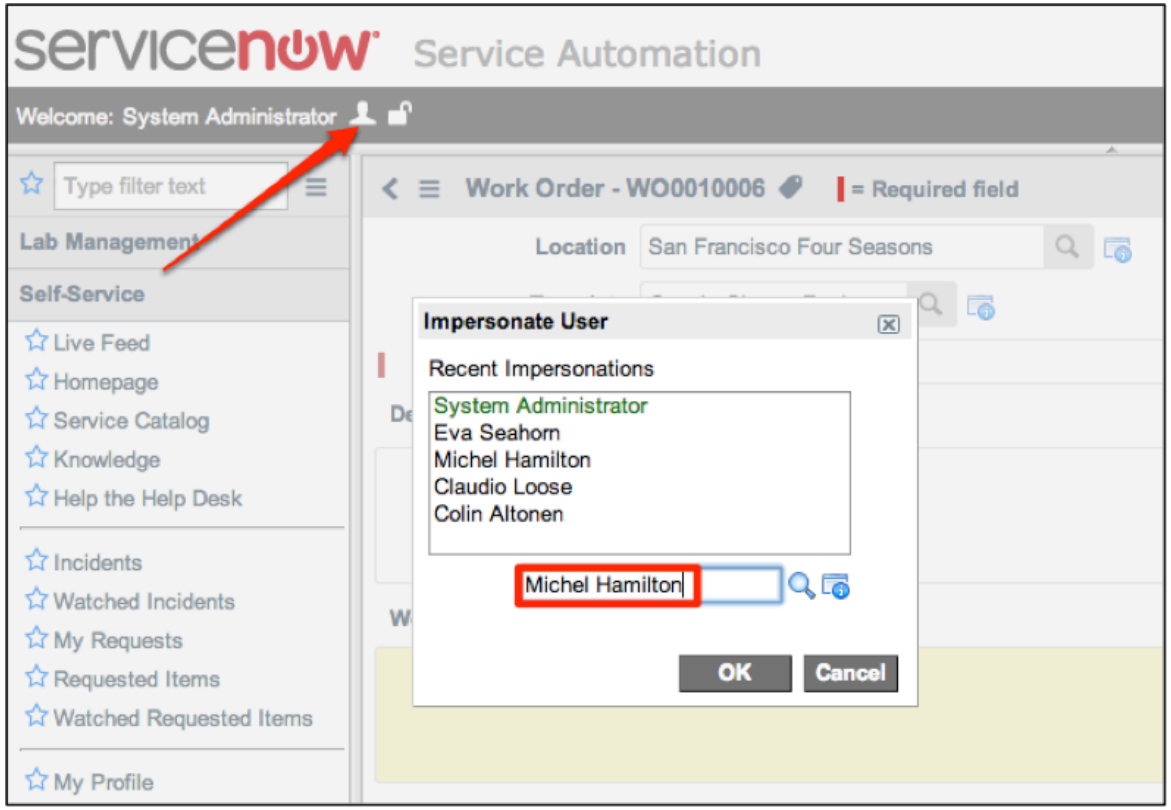
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Lab 6 (1/8)

Work a Task from the Desktop

- Using the **Impersonate** icon in the header, impersonate user **Michel Hamilton**.

- Michel has the role of ‘Agent’.



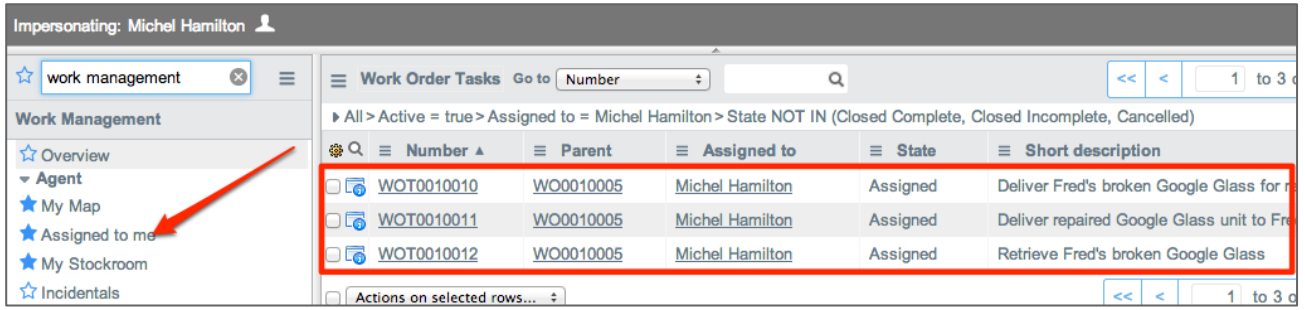
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Lab 6 (2/8)

Work a Task from the Desktop

- Navigate to **Work Management > Assigned to me** in the left nav.

- You should see the 3 Work Order Tasks that are assigned to Michel.



- Let's explore the different methods by which Michel can work the tasks.

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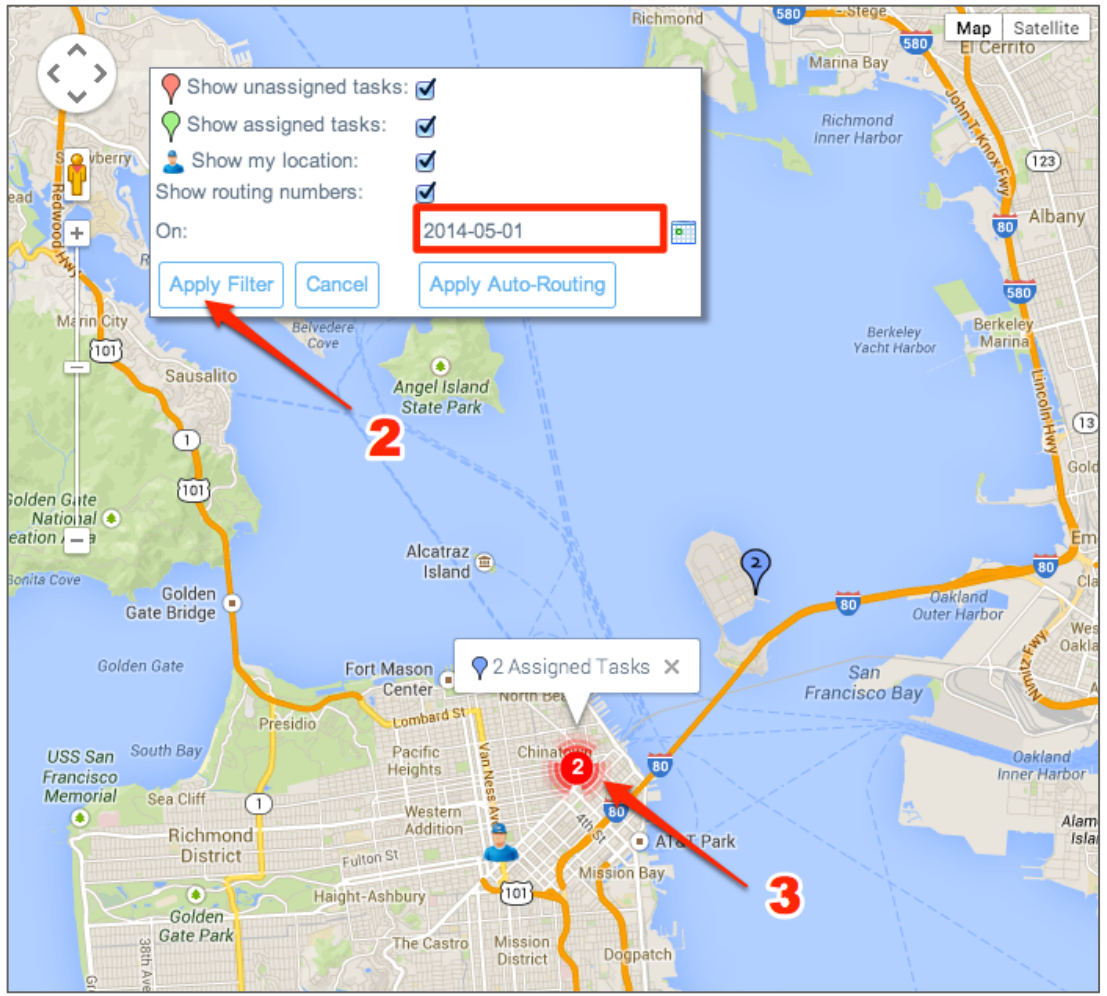
Lab 6 (3/8)

Work a Task from the Desktop

1. Navigate to **Work Management > My Map**.

2. Click **View Filter** in the top left of the map view and set the date to **2014-05-01**. Click **Apply Filter**.

3. You should see Michel's location and his active tasks on the map.



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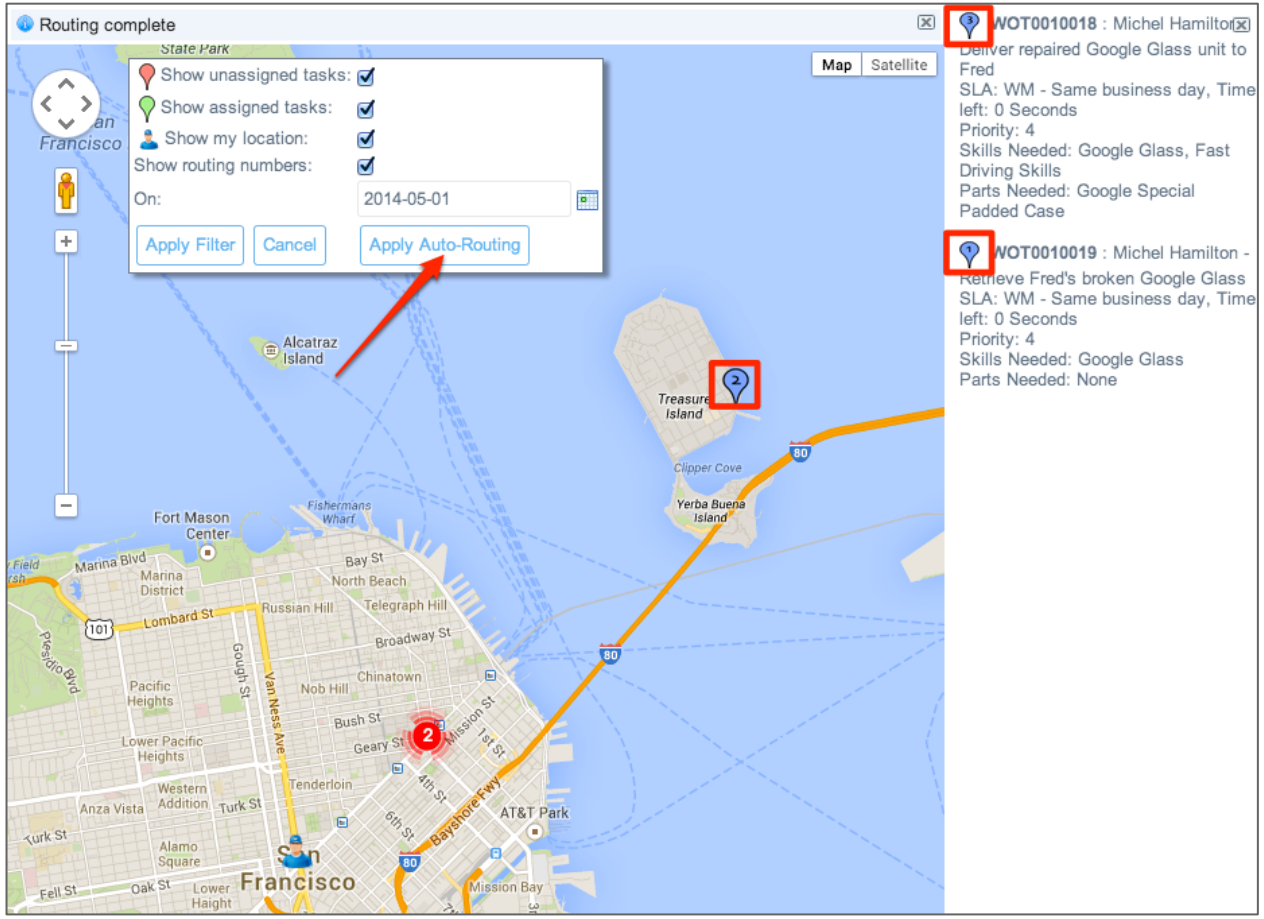
Lab 6 (4/8)

Work a Task from the Desktop

In order to ensure Michel travels most efficiently, let's auto-route his tasks.

- On the map view, click **Apply Auto-Routing**.

- Michel's tasks are now optimized and numbered based on proximity, schedule, and task dependency.



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Lab 6 (5/8)

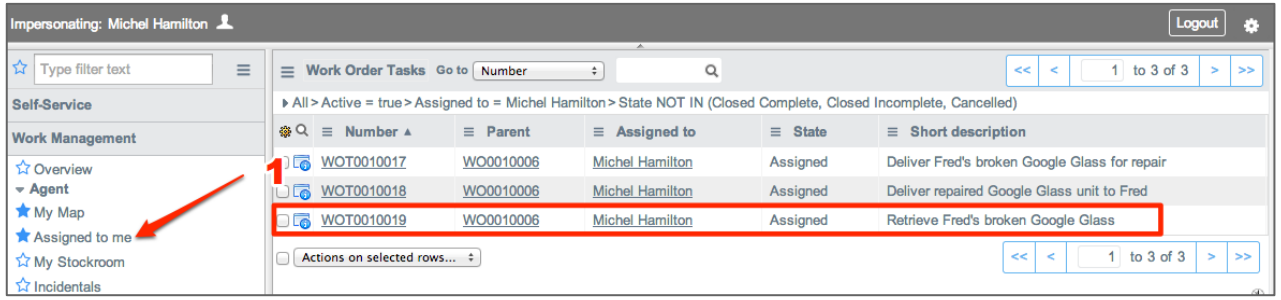
Work a Task from the Desktop

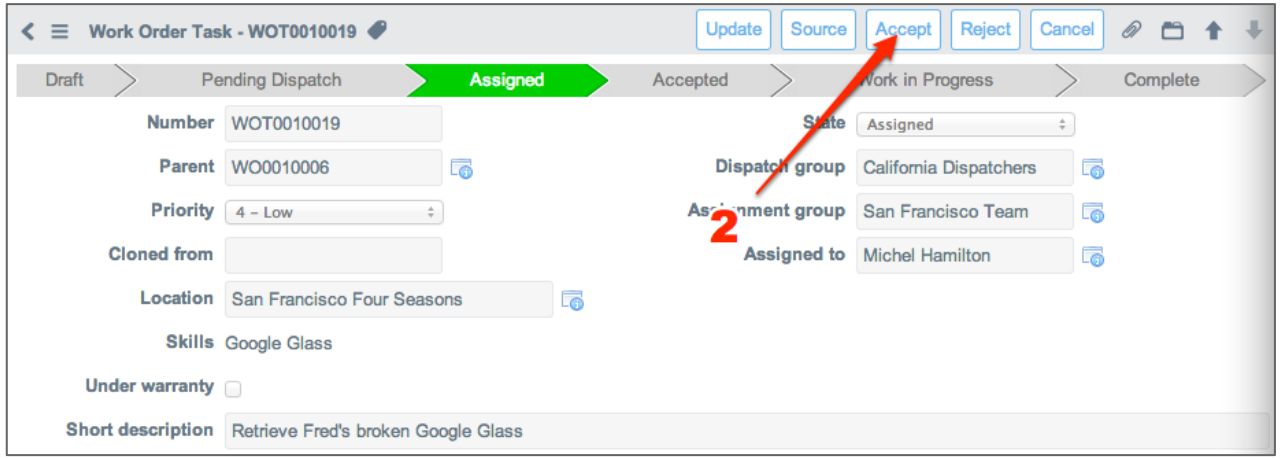
Before beginning work, Michel must accept all of his assigned tasks.

1. Navigate to **Work Management > Assigned to me**.

2. Open the first task. Click **Accept**.

3. Repeat for the 2 remaining tasks.





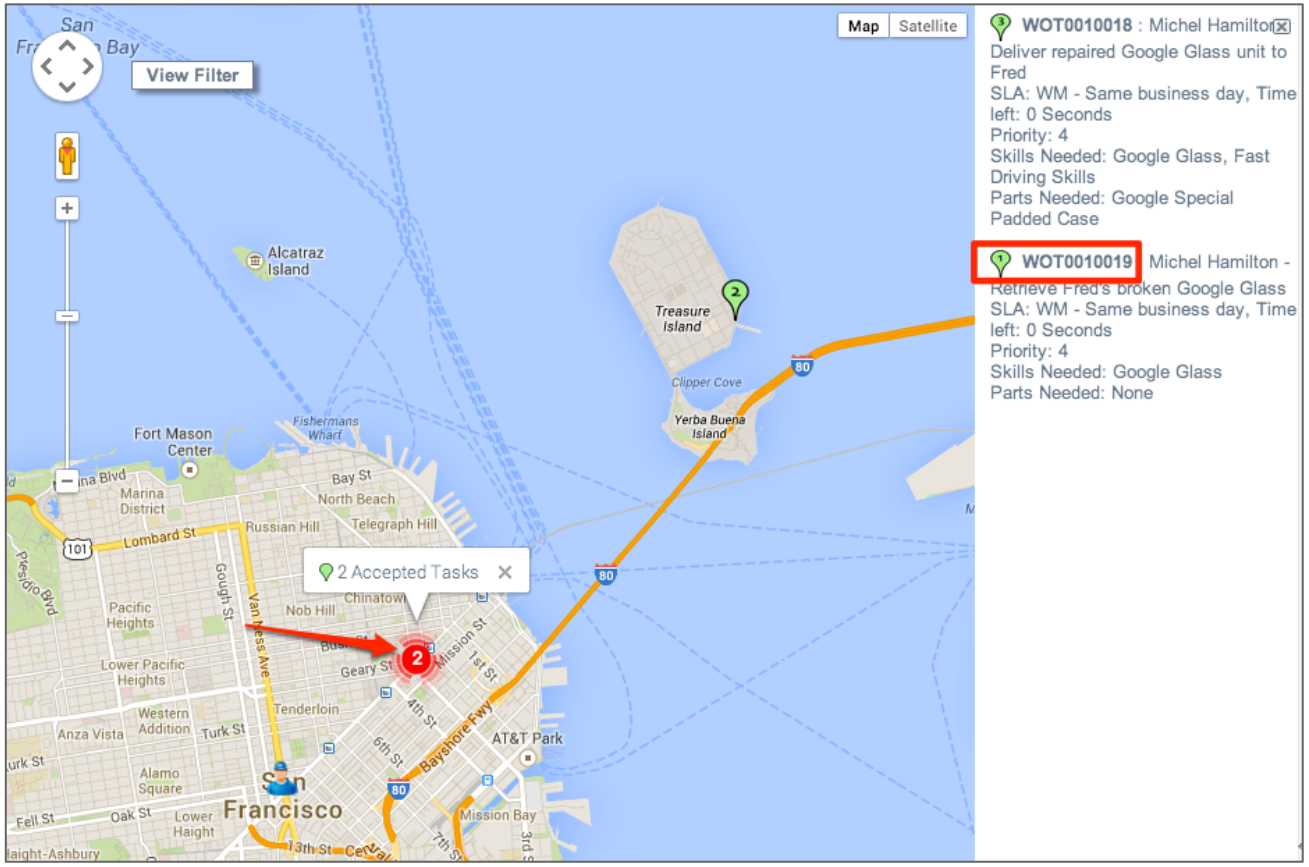
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Lab 6 (6/8)

Work a Task from the Desktop

- Navigate to **Work Management > My Map**. On the map, click the red circle with the ‘2’. Notice the task markers are now green, indicating Michel has accepted them.

- In the right sidebar, click the task number for the first task, **Retrieve Fred’s broken Google Glass**.



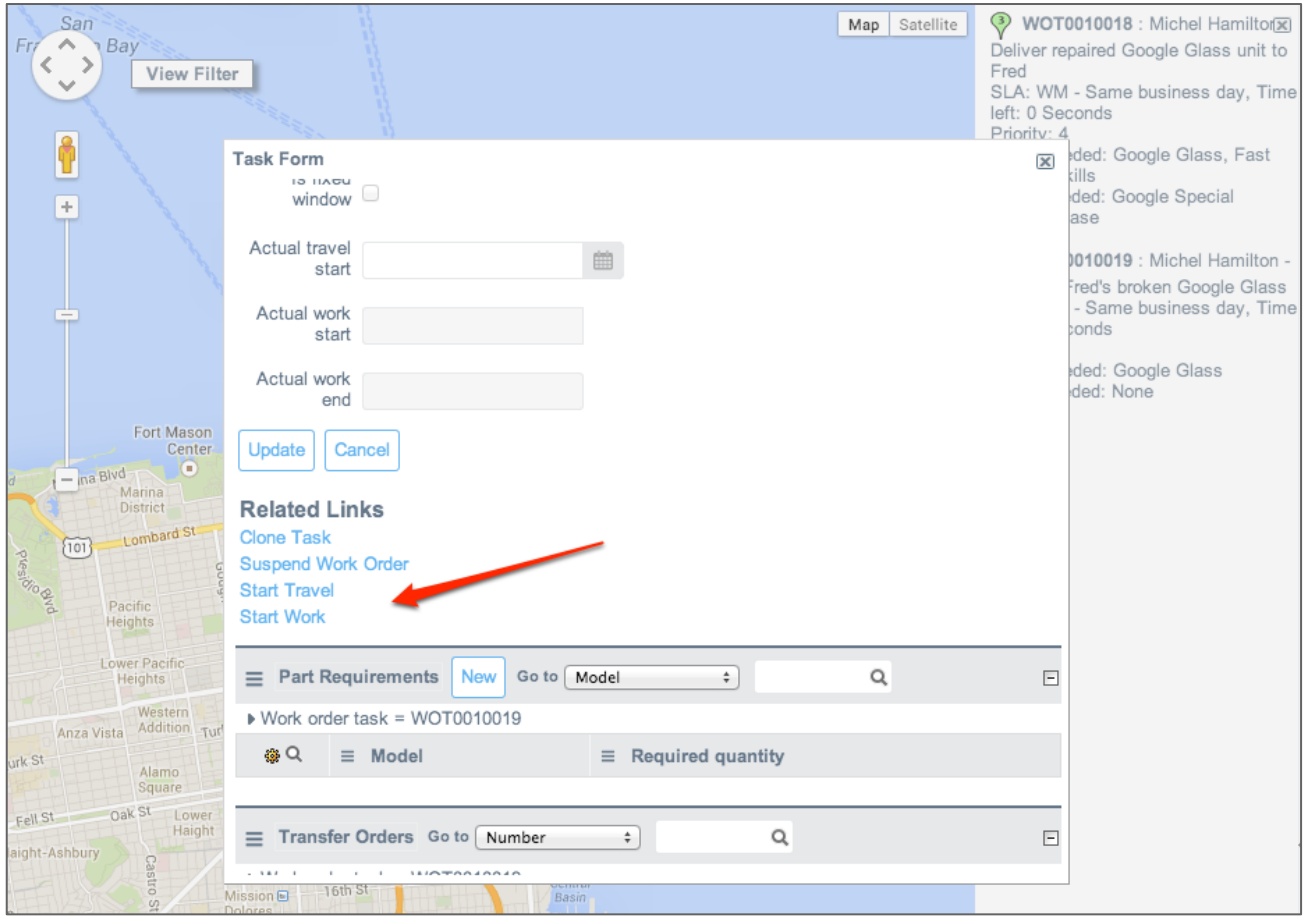
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Lab 6 (7/8)

Work a Task from the Desktop

- In the task form overlay, proceed to work this task as listed in your lab guide. The steps are:

1. Click **Start Travel**.
2. Click **Start Work**. (Notice the start/end dates on the record auto-populate.)
3. Enter information in **Work notes**.
4. Click **Close Complete**.

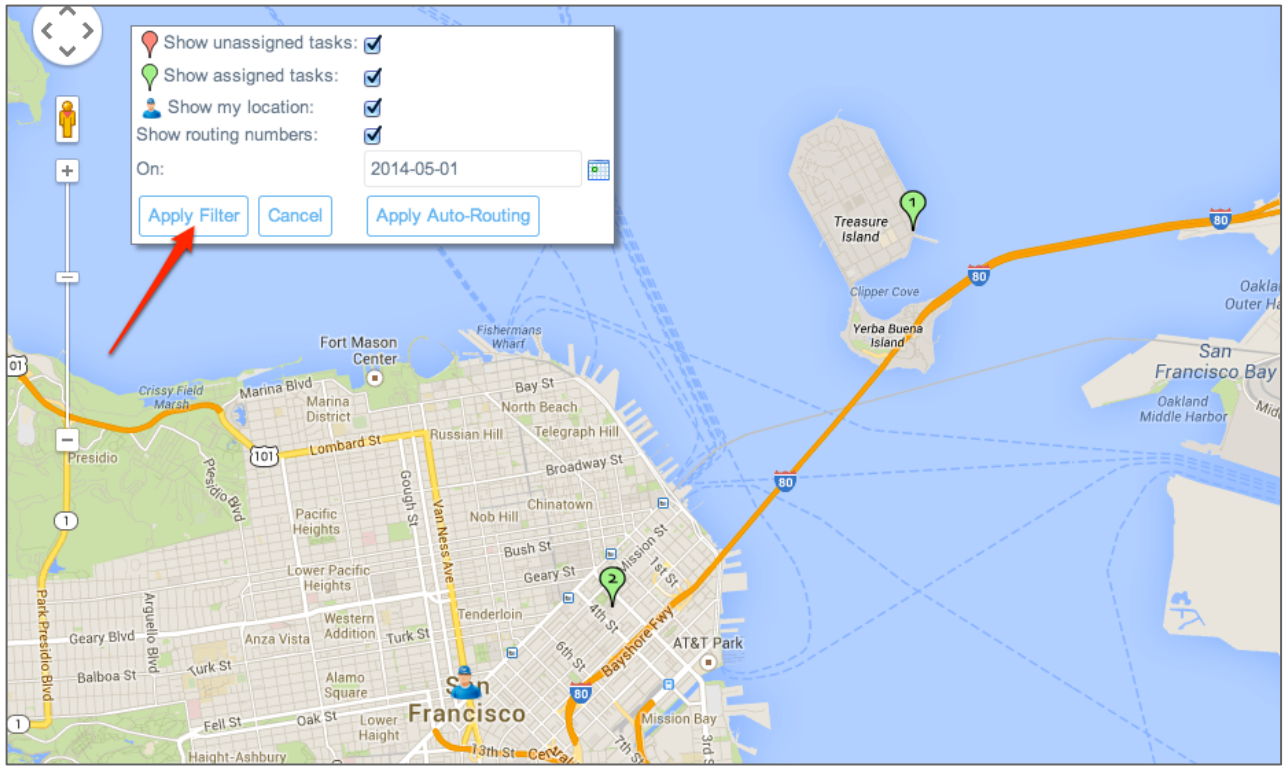


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Lab 6 (8/8)

Work a Task from the Desktop

- After completing the first task, close the pop-up window to return to the map.
- Click **View Filter** to open the filter box and click **Apply Filter** to reload the map.
- Notice that Michel's completed task is now gone from the map.

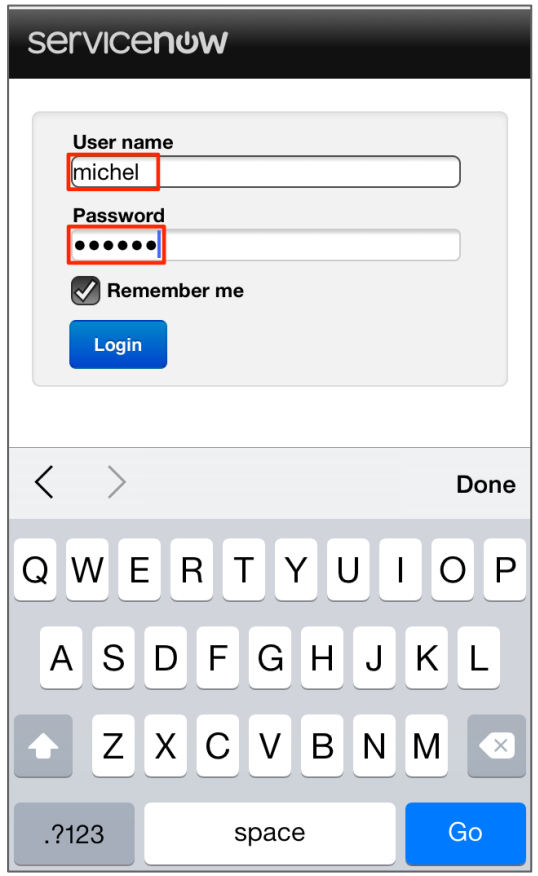


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Lab 7 (1/4)

Work a Task from a Mobile Device

- Now, let's see how Michel can work a task from his mobile device.
- On your internet-connected mobile device, navigate to the URL of your lab instance.
- Login using the credentials:
  username: *michel*
  password: *michel*



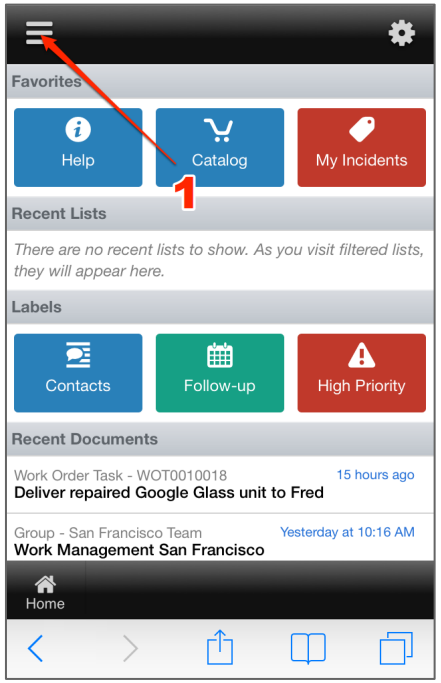
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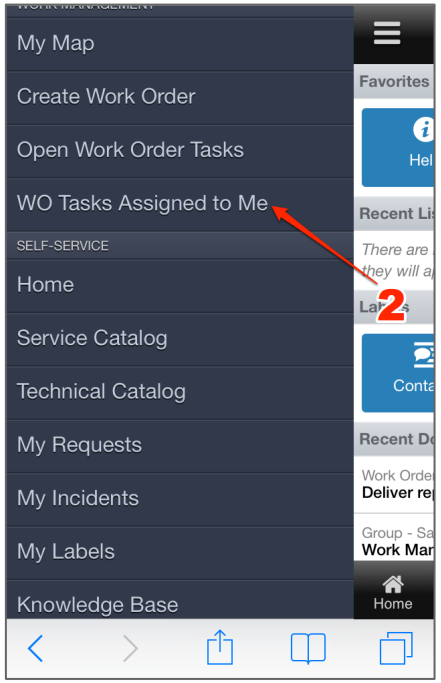
Lab 7 (2/4)

Work a Task from a Mobile Device

1. On the homepage, tap the ‘hamburger’ icon.

2. On the menu sidebar, tap **WO Tasks Assigned to Me**.





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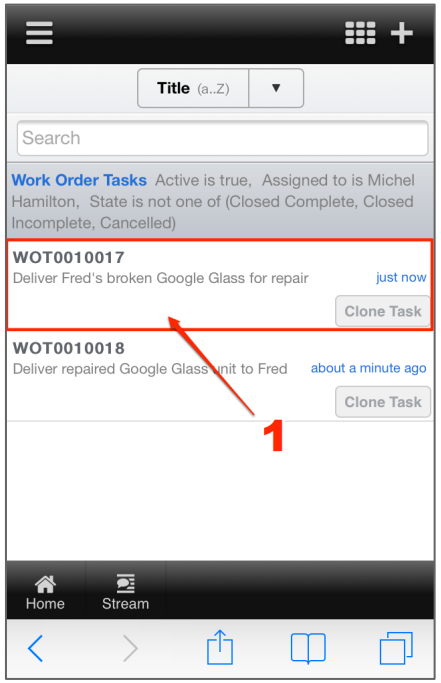
Lab 7 (3/4)

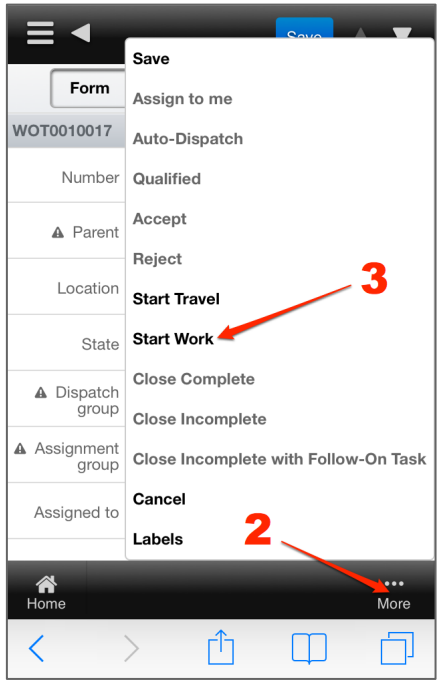
Work a Task from a Mobile Device

1. Tap on the next scheduled task, **Deliver Fred's broken Google Glass for repair**.

2. On the task form, tap the **More** icon to open the menu.

3. Tap **Start Work** to begin the task.





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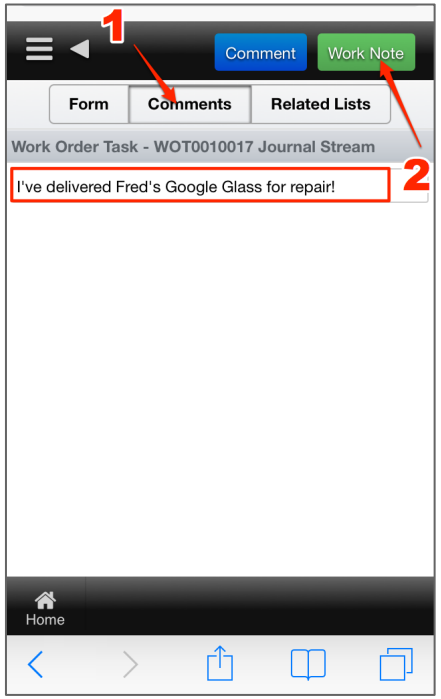
Lab 7 (4/4)

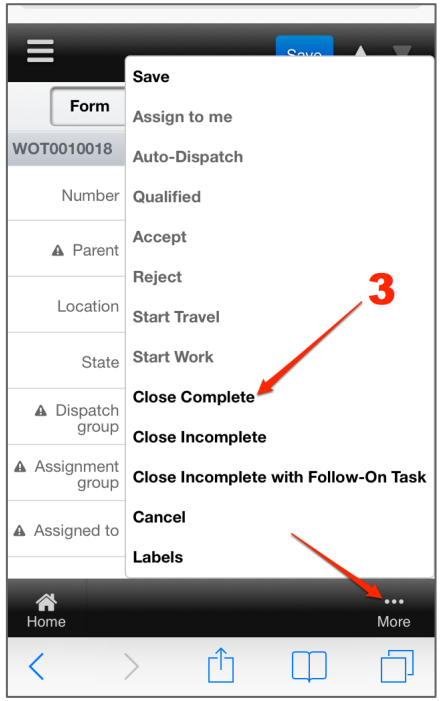
Work a Task from a Mobile Device

1. Navigate to the **Comments** tab.

2. Add work notes to the task, then tap **Work Note** to save them.

3. Navigate back to the **Form** tab, tap the **More** icon, and tap **Close Complete**. The task will no longer appear in Michel's queue or map.

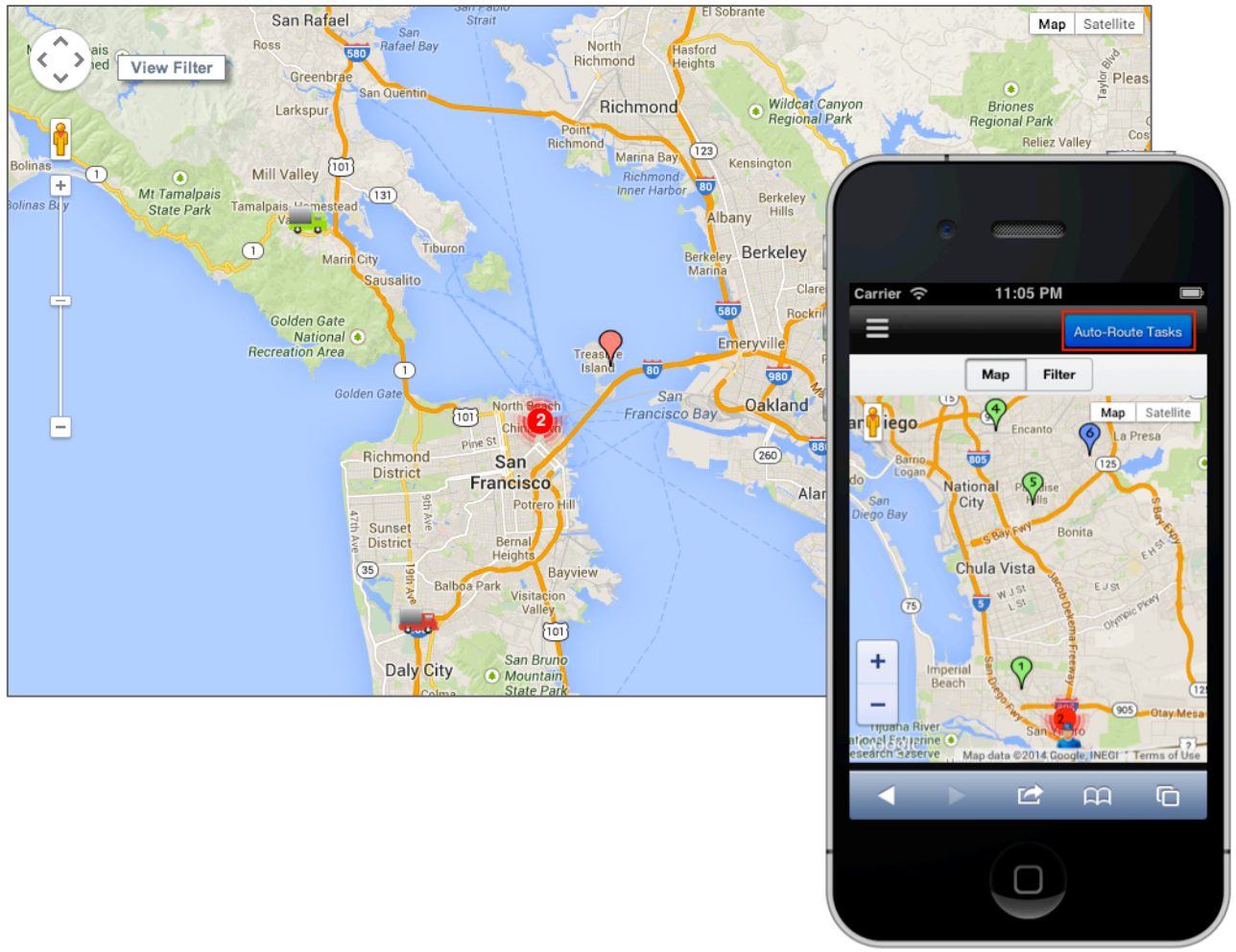




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Geolocation in Work Management

- ServiceNow attempts to geolocate agents each time they open a task:
  - Mobile or desktop
  - Any location-aware browser
- Location-aware benefits:
  - Auto-routing for most efficient travel
  - Map view for simplified dispatching
  - Simplified visual ‘on-schedule’ tracking



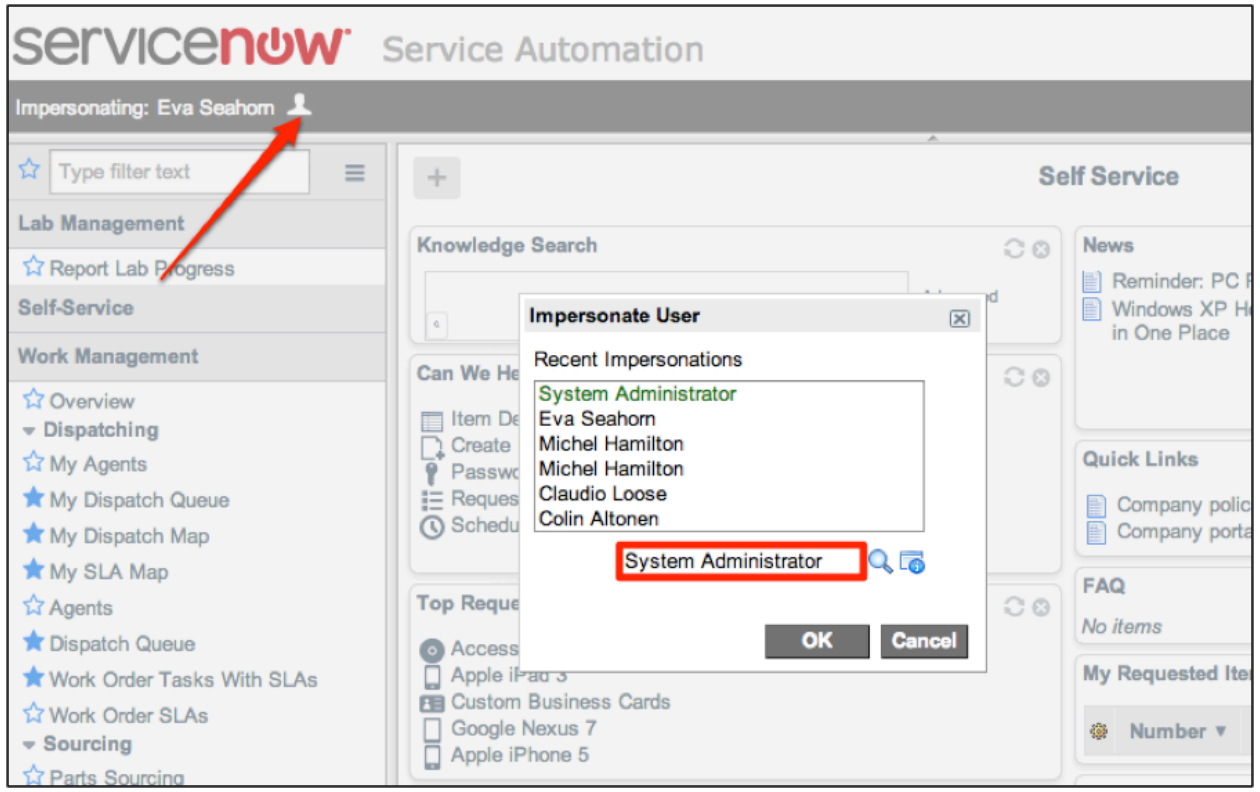
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Lab 8 (1/6)

Geolocate from a Mobile Device

- Before geolocation occurs, it must be enabled for each desired user.

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



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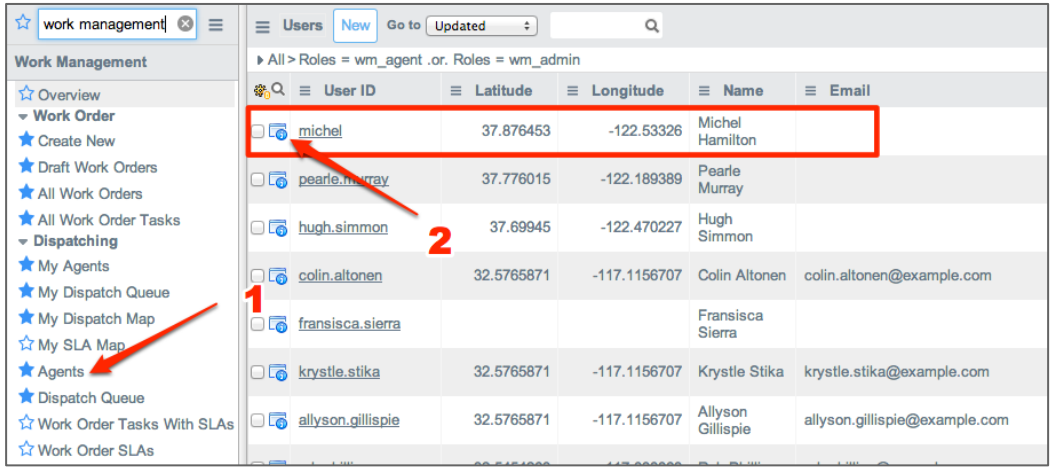
Lab 8 (2/6)

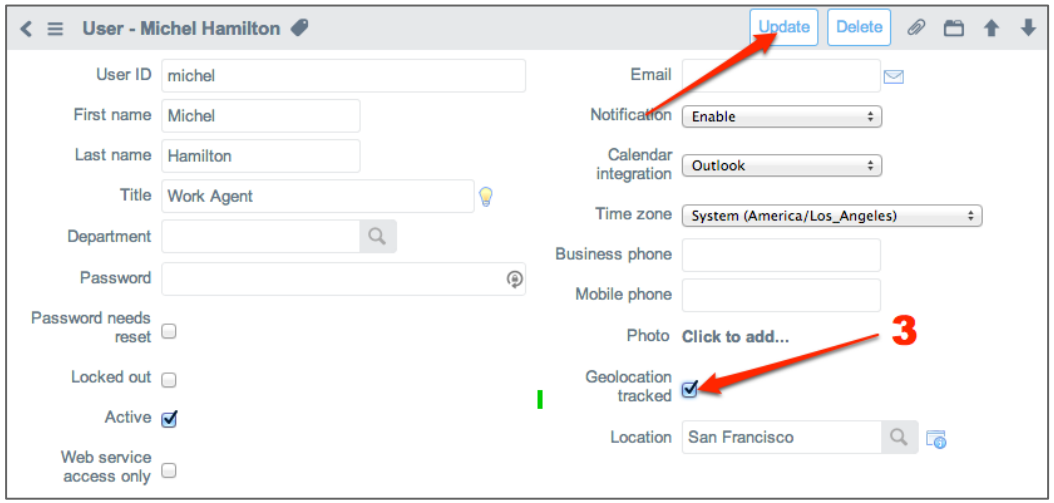
Geolocate from a Mobile Device

1. Navigate to **Work Management > Agents**.

2. Click to open **Michel Hamilton's** user record.

3. Check the **Geolocation tracked** box and click **Update**.





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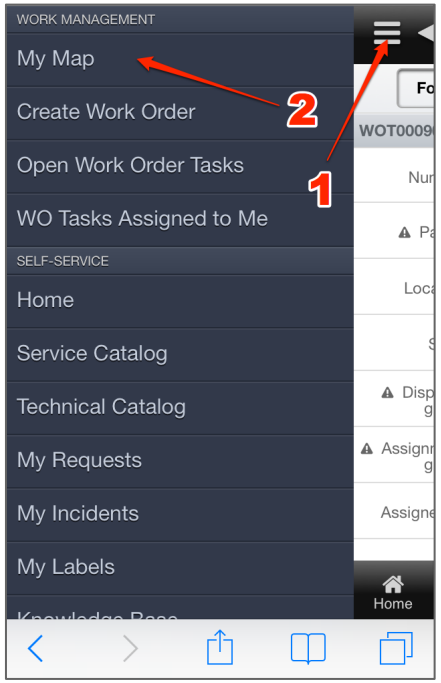
Lab 8 (3/6)

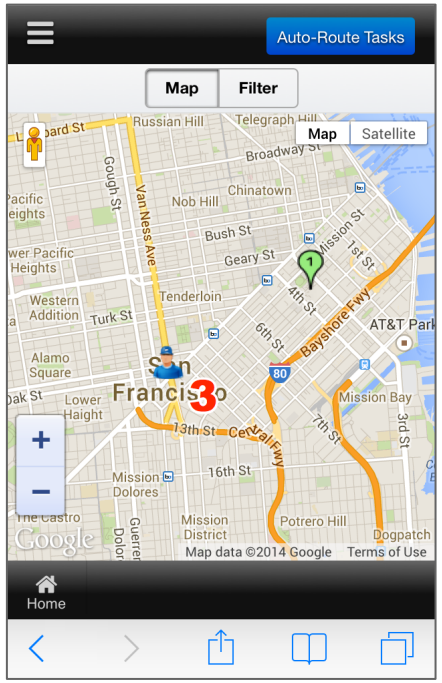
Geolocate from a Mobile Device

1. Back on your mobile device, you should still be logged in as **Michel Hamilton**. Tap the ‘hamburger’ icon to open the main menu.

2. Tap **My Map** to view the map.

3. Notice Michel’s current location.





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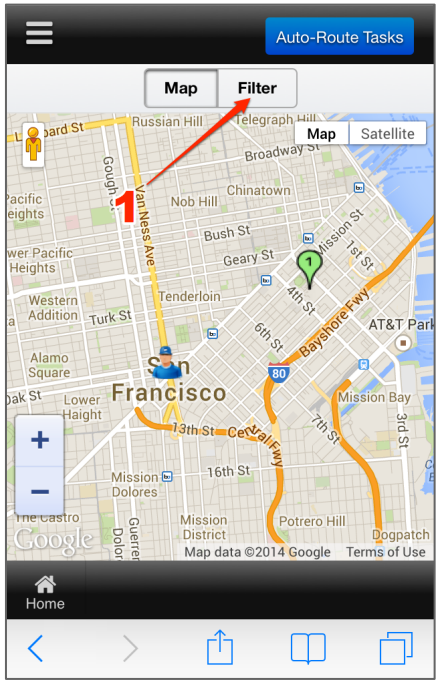
Lab 8 (4/6)

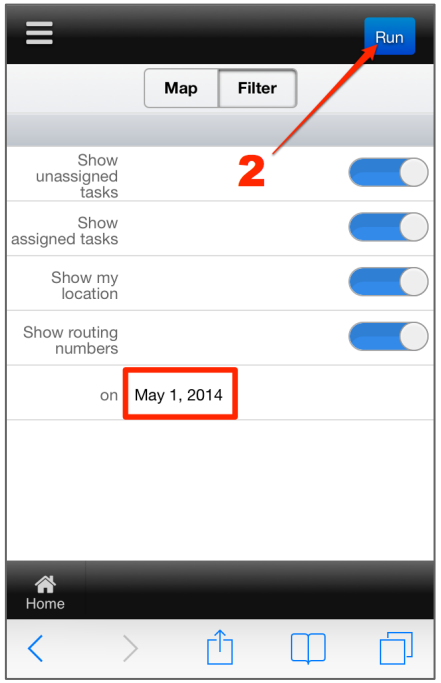
Geolocate from a Mobile Device

On the mobile map view you may need to adjust the date to view tasks.

1. Tap the **Filter** tab and set the **On** date to **May 1, 2014**.

2. Click **Run** to re-display the map.





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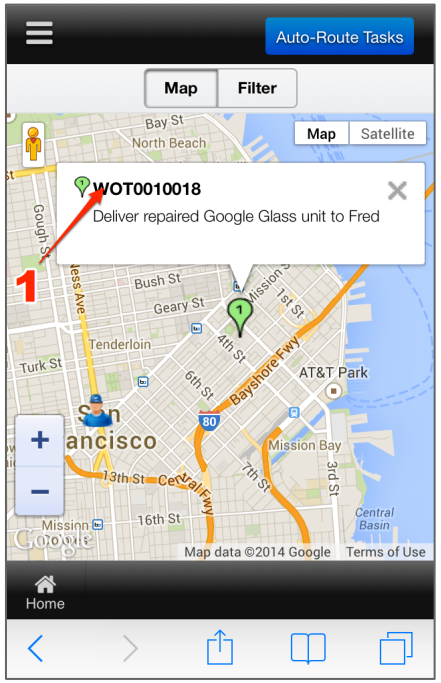
Lab 8 (5/6)

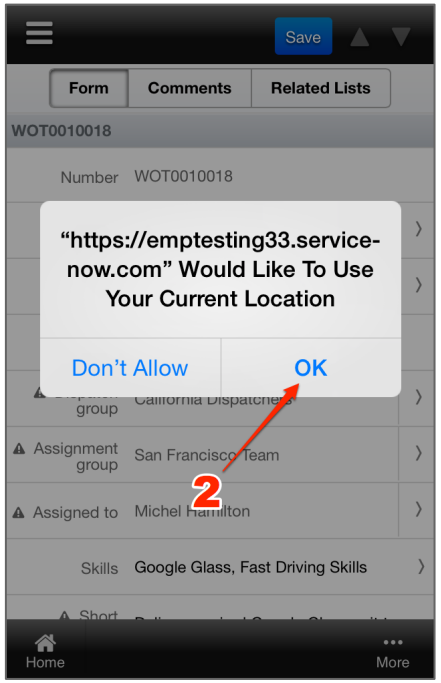
Geolocate from a Mobile Device

1. Michel's final task should now be visible. Tap the map marker and task number to open the task.

2. Depending on your device settings, you may be asked to allow location access. Click **OK**.

3. Complete the final task as in the prior lab exercise.





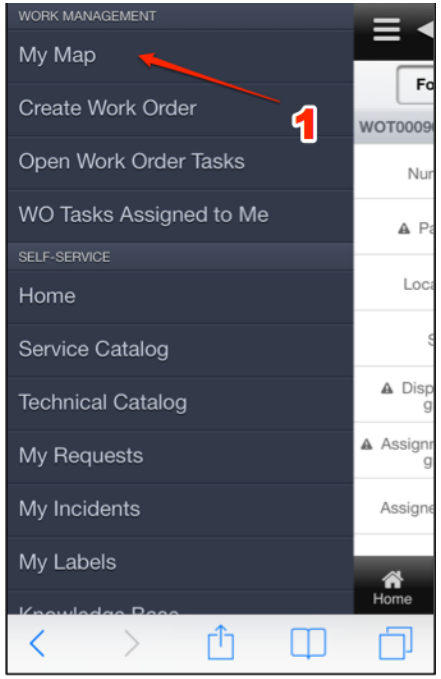
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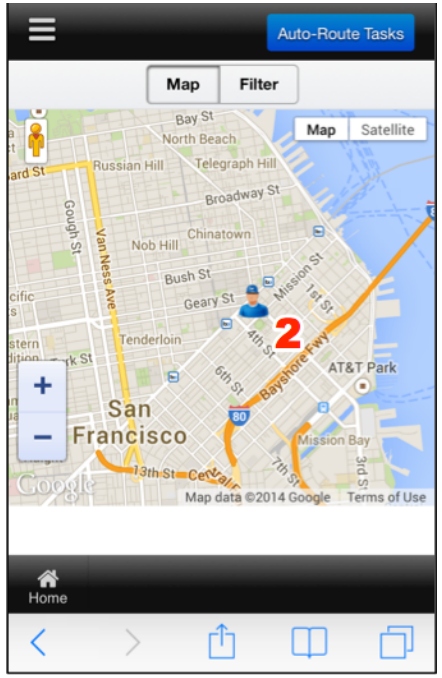
Lab 8 (6/6)

Geolocate from a Mobile Device

1. After completing the final task, navigate to **My Map**.

2. Notice Michel's new location at the **Moscone Center**, where we are currently located! Also notice that Michel has no further tasks listed on his map for today.





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Lab Complete

- Whew - You saved the day! The Google Glass has been repaired and returned to Fred.





- Fred's happy and, if Fred's happy, then we're happy. High five!

The show can go on - enjoy the rest of K14!

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Why Work Management in ServiceNow?

- Work Management is inextricably tied to existing ITSM processes:
  - Incident
  - Change Management
  - Asset / CMDB

- ServiceNow platform capabilities naturally fit the needs of Field Service teams:
  - Logical tasking structure w/ notifications, workflow, & approvals
  - Role-based views & permissions
  - Mobile interface
  - Enhanced geolocation capabilities in Eureka

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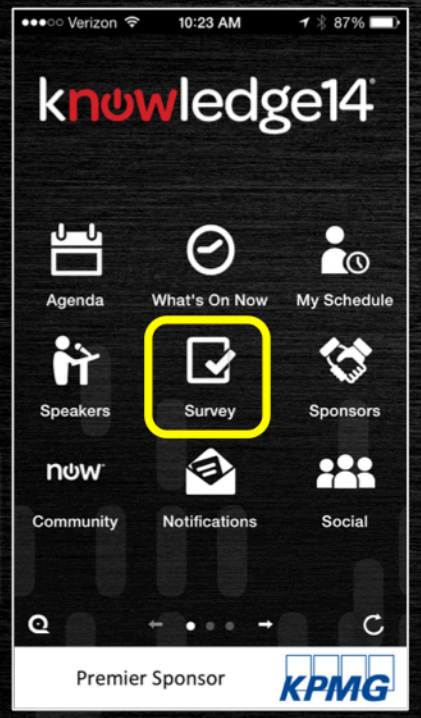
Audience Poll

- What else do you want to talk about?
- Questions from the Work K14 Portal Live Feed Group?
- Questions from the audience?



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Tell us what you think!



Click on the survey link in your Knowledge14 mobile app. Help us make Knowledge 15 even more valuable!

Thank You

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