

Field Service Management (FSM) Fundamentals

1: Field Service Management (FSM) Overview

Topics:

- Field Service Definition, Use Cases, and Models
- Field Service Management Solution on the ServiceNow Platform
- Field Service Plugins, Terminology, and Personas
- Field Service Management Process and Objectives

Lab

- Lab 1.1: Explore the Group Management Module
- Lab 1.2: Explore the Work Order Module
- Lab 1.3: Use Guided Setup

2: Work Order Management

Topics:

- Work Order Creation
- Work Order Templates
- Work Order Questionnaires
- Work Order States and Process flow
- Maintenance Plans
- Parts Requirements and Parts Sourcing
- Work Order Qualification

Labs:

- Lab 2.1: Create and Use a Work Order Template
- Lab 2.2: Create a Questionnaire
- Lab 2.3: Create and Use a Maintenance Plan
- Lab 2.4: Parts Sourcing and Transfer
- Lab 2.5: Create a Work Order Flow using Flow Designer

3: Scheduling and Dispatch

Topics:

- Scheduling
- Dispatch Methods
- Dispatch Management
- Team Management

Labs:

- Lab 3.1: Dispatch a Work Order Task using Central Dispatch
- Lab 3.2: Dynamic Scheduling
- Lab 3.3: Configure Map Page
- Lab 3.4: Appointment Booking

4: Field Agent Activities

Topics:

- Work Resolution
- Review and Perform Tasks
- Closure and Resolution
- Time Reporting

Labs:

- Lab 4.1: Agent Onsite Operations (Desktop)
- Lab 4.2: Time Sheets and the Time Sheet Portal

5: Managing Work Delivery

Topics:

- Performance Management and Key Performance Indicators (KPIs)
- Overview of Reporting and Performance Analytics (PA)
- Data Collection Process

- Widgets and Dashboards

Labs:

- Lab 5.1: Create and Schedule a Report
- Lab 5.2: [Optional] Performance Analytics for Field Service Management