Field Service Management

INDEX

Introduction

Field Service Management provides coordination of field service operations like scheduling, dispatching, labor tracking, and invoicing which helps organizations to manage and record details, necessary skills, and required parts in work orders and work order tasks, so that these tasks can be assigned to employees based on skill, location, and inventory.

Features of Field Service Management:

Management of work orders

It allows a company to allocate and track who was in charge of a specific task.
It allows the assignee to keep track of how long it took them to complete their task.

Job scheduling and dispatching

Job scheduling establishes work order completion timelines, employee schedules and service appointments.
Dispatch management designates which field technician is sent where and when they are sent out.

Contract management

It involves managing service level agreements and ensuring that providers meet their SLA commitments. SLAs specify the type of service provided and the standards that the provider will meet.

Customer self-service components

It enables customers to pay for, schedule and track a job, as well as communicate with staff.

Inventory management

It allows us to track parts and supplies as they are ordered, stored, used and sold. It helps workers know what to order, when to order and reorder, and how much to order.

Benefits of Field Service Management:

Customer experience:
This tool promotes better customer experience by giving customers real-time insight into the work being done. It helps them to communicate directly with technicians and back-office personnel in real time.

Efficiency:
It allows companies to improve operational efficiencies by optimizing work order routing and technician scheduling. It lets companies spend less time documenting details and increases the task completion rate and the timely resolution of issues.

Flexibility:
It makes customer service nimbler. Management has more insight into the work process and customer experience using FSM tools, and they can coordinate jobs in ways that satisfy everyone.

Increased productivity:
It Improves data insight and access to better back-office support through real-time communication allows field technicians to cut down on errors. These capabilities also improve technicians' first-time-fix rates and increase the quality and quantity of work.

Improved safety and compliance:
It allows technicians to attach digital proof of work to their work orders and preserve a compliance audit trail. This approach helps organizations comply with safety and other regulations.

Reduced cost:
This tool digitizes paper-based tasks such as invoicing and data entry, lowering administrative costs.

Reporting and monitoring:
It provides technicians and back-office staff with easy-to-understand information about their jobs, improving decision-making, Job completion rate and average revenue per job.

Field Service Management Roles:

- **Administrator [wm_admin]**
  Used to manage data and perform setup and configuration tasks, with this role we can create, approve, qualify, and dispatch work orders and tasks.
- **Initiator [wm_initiator]**
  Used to create work orders and assign qualification groups.
- **Approver user [wm_approver_user]**
  Used to Approve work orders before they are qualified or assigned to field service agents.
- **Qualifier [wm_qualifier]**
  Used to Qualify work orders by assigning dispatch groups, creating work order tasks, and adding part requirements.
  11111111111111111111
- **Agent [wm_agent]**
  Used to Perform work at customer locations and records details in the work order form, including parts used and incidental expenses.

Activating Field Service Management:

Install the plugins

Navigate to **All** > **System Applications** > **All Available Applications** > **All**.

Field service management (com.snc.work_management)

This plugin activates related plugins, if they are not already active.

12 of 12 application(s) has been installed :

- ☑ Field Service - Questionnaire
- ☑ Dynamic Scheduling
- ☑ FSM Agent Workspace
- ☑ Automatic Assignment
- ☑ Field Service Management Demo Data
- ☑ Field Service Map
- ☑ Field Service - Signature Pad
- ☑ Field Service Management
- ☑ Field Service Management Geolocation Demo Data
- ☑ Field Service Mobile
- ☑ Central Dispatch
- ☑ Time Recording for Field Service

Work Flow of Field Service Management:

PLANNER:

- It is used for model work steps in job Plans and Routes
- It defines Preventive maintenance frequencies and forecast long term work and cost.
- It uses hysterical data to adjust the plan

SCHEDULER:

- It creates rolling work schedules
- It contains Schedule windows and network dependencies.

CUSTOMER SERVICE:

- To book appointments based on customer preference, technology availability, work zone, etc.

SUPERVISOR/ DISPATCHER:

- It is used to assign scheduled work, monitoring and to assign emergencies.
- It refine schedules based on real-time field progress.
- It Incorporates traffic and weather.

TECHNICIAN:

- Technician receives assignments, optimized routes and directions.
- Technician reports on progress and work completion

Field Service Management configuration

Work Order:

Work orders created from Incident, Problem, Change or Project task records in order to track and assign to off-site agents.
To create work orders we need an Initiator **[wm_initiator]** or Administrator **[wm_admin]** role.
Creating a Work Order:

- Login as a system administrator.
- Assign the work order Initiator and administrator role to user
- Navigate to Field Service > Work Order > Create new

After Submitting the form there is a related list tab at the bottom of the Work Order Form.

Affected CIs:

It is a primary item that requires work, such as a broken laptop or a printer.
This is a configuration item lookup list based on the selected company.

Work Order Task:

It allows qualifiers to define separate activities that must be performed to complete a work order.

Part Requirements:

It allows access to the parts which are required to complete the task.

Task SLA:

It shows the amount of time spent to complete a particular task.

Relationships:

It allows us to create a relationship between work order and other tables.

There are FOUR types of Work Orders:

1. **On-demand work order:**

   It is an unscheduled work order for problems that are noticed by someone which currently exist.

   For example: A leaky pipe in the kitchen.

2. **Preventive Maintenance work order:**

   A scheduled routine maintenance task performed on individual assets or groups of assets.

   For example: cleaning and lubricating essential equipment

3. **Internal/Manual Entry work order:**

   An internal document, detailing maintenance work that has been approved for execution.

   For example: A machine operator might submit a work request when equipment breaks down.

4. **External/Third Party work order:**

   Someone on the team does the work(the work needs to be done that is outside the technical abilities of the maintenance team)

   For example: A collection agency.

Work Order Questionnaire:

It gathers different types of information from field service agents like verifying their compliance with the generic field service process while working on the task.

Navigate to **Field Service** > **Administration** > **Questionnaire**.

Fill the form and submit, and then click on the questionnaire designer to create questionnaires.

Dispatcher Workspace:

It is a configurable scheduling application.

It gives service dispatchers and managers a complete view of tasks, teams, locations, and status.

Navigate to Field Service>Dispatching>Dispatcher Workspace

Features:

Dispatcher dashboard:

It displays the real-time data of the operations and performance of field service agents across their assignments.

Dispatcher workspace:

Dispatchers can view everything in one single screen, from unassigned tasks to technician schedules and location maps.

Automated work assignment:

Schedule work orders fast based on technician skills, parts, distance, and recommendations.

Central Dispatch:

Here we can assign the work order task to agents just by dragging and dropping to the desired agent schedule and time slot.

It provides the list view and the calendar view of the unassigned tasks.

Dispatch Map:

It uses the geolocation data to show tasks and agents in the field.

It provides tasks and agents provide access to scheduling information and links to related records.

Field Service Management Best Practices

- **Organized and accurate scheduling:**
  Scheduling is paramount for field service. Mobile apps that integrate with back-office software like inventory management tools will provide real-time data to update delivery schedules. This system keeps things orderly and correct without the hassle of unnecessary paperwork or unproductive phone calls. Consider organizing data, field service and customer feedback to establish accurate customer and employee schedules.

- **Streamline recurring projects:**
  Identify and streamline repetitive tasks and recurring projects so they don't hinder customer service. Getting bogged down in the minutiae is a recipe for disaster. Once a job is complete, review and analyze improvement opportunities.

- **Real-time data and communication:**
  Establish well-defined procedures for reporting problems. This process shouldn't be an obstacle to employees or customers. The data you collect for real-time reporting makes communication, inventory control and scheduling more efficient.

- **Field-service employee follow-up:**
  Employees with field service experience offer valuable insight.Workers who have knowledge, background and expertise to help provide nuances to your field service processes. Develop a plan to assess, review and listen to field service employees. Without feedback, it's hard to improve processes and best practices. They may have new ideas or concerns that will lead to refinements. Reviewing their schedules, projects and experiences with them adds to field service management success.

- **Automated reminders**
  Automatic reminders are a non-invasive way to give your workforce and customers useful information that otherwise may not be accessible, like service outages, software updates or traffic jams that delay an appointment.

- **Workforce empowerment:**
  Give the field service team the authority to solve unforeseen problems in the field. Field service management tools provide your workforce with a meaningful way to report

problems and receive useful feedback in real time. Additionally, employees can give customers correct information or alternatives to allay any fears of missed delivery times or the like.

- **Turn loyal customers into evangelists:**
  High quality field service management will improve customer service, maintain long-standing relationships and help find new opportunities. With FSM, customers are more likely to receive prompt and efficient service, and it gives them more options like accessing reports, quotes and invoices through an online portal.

Dispatcher Workspace Example

Example:1

Create the following new work order:
Template: Antenna Bi-Annual Maintenance
Short description will be automatically populated as Bi-Annual Maintenance
Description: Antenna check
Submit the work order.
Create the following work order task to above work order:
Dispatch group: California Dispatchers

Assignment group: NorCal Technicians

Work type: Planned Maintenance

Skills: Telephony Wiring, Routers/Switches, SAP Basis

Short description: assign work order task to agent based on skill match in dispatcher workspace

Assign to an agent in the dispatch workspace.

PROCESS:

Step-1:

Creating work order

Click on Ready for Qualification then state changes to Qualified.

Step-2:

Creating work order task

Click on qualified then state changes to pending dispatch

Step-3:

Assigning to agents based on skill matching.

Navigate to Field Service>Dispatching>Dispatcher Workspace

Assign WOT0010004 to Alex Ray

Drag and drop in the workspace next to agent

Task is assigned to Alex Ray and State is automatically changed to Assigned

Field Service Management Use Case

UseCase 1:
Problem Statement:

Attach the questionnaire to the work order task based on the category.

SOLUTION:

Step-1:

Adding new field on work order task
New field: category
Type: Choice
Choices: ITSM, ITBM, FSM
Navigate to Field Service > All Work Order Tasks

Step-2:

- Creating a Questionnaire for ITSM, ITBM, FSM
- Navigate to Field Service > Administration > Questionnaire

Click on NEW

Click on Submit.
- Click Questionnaire Designer to add questions and publish.

Adding FSM Questionnaire:

- To add questions Drag from the controls.
- Click on Edit this question to add choices

Click on Save AND Publish
Click on preview

In the same way create for ITSM and ITBM
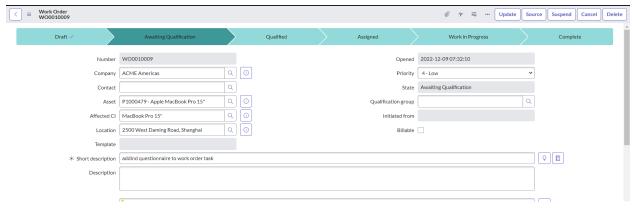
ITBM Questionnaire

ITSM Questionnaire

Step-3:

Observe the Output How questionnaire was added!
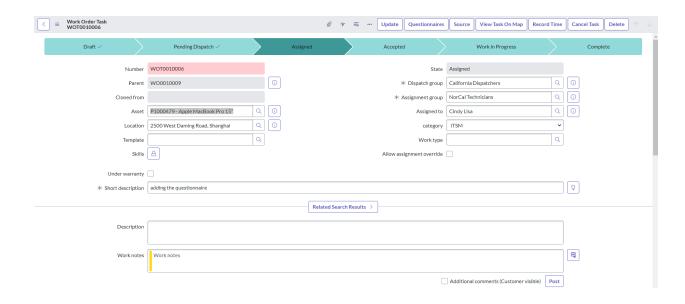
Create a work order:

Click on ready for qualification
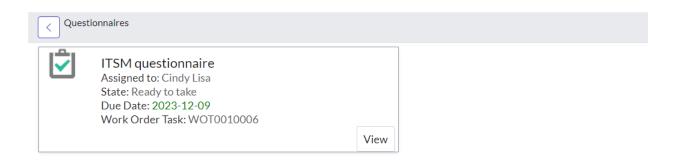

Create Work order task on work order:

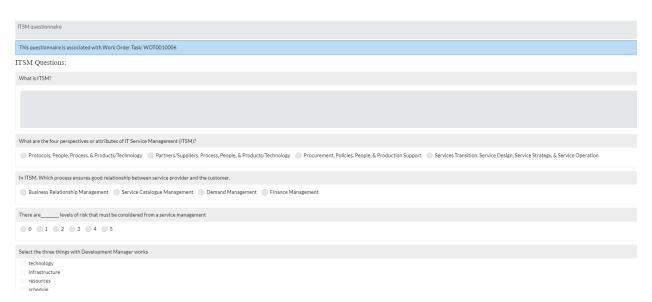

Click on Qualified

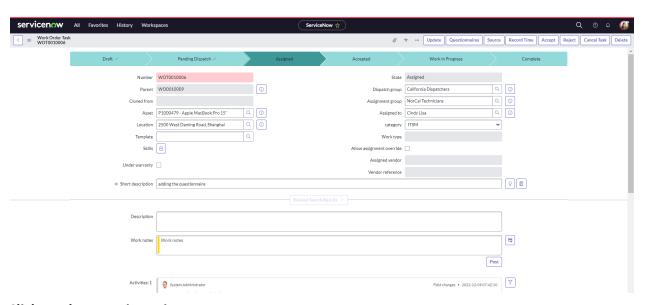# Work order

Click on questionnaire

Click on view
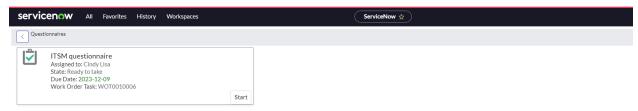
We observe that questionnaire form is read only.

Step-4:

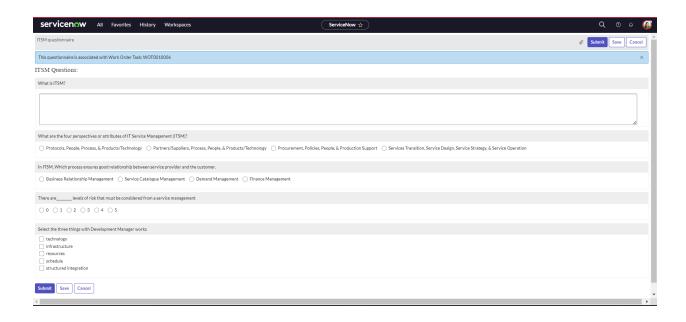**Impersonate to cindy lisa**

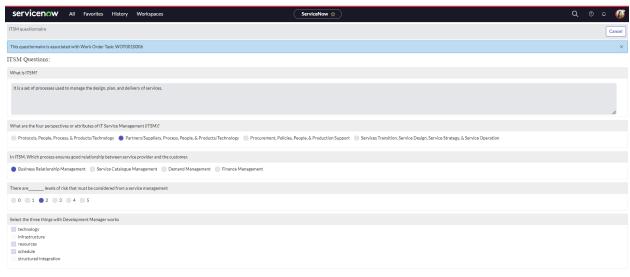**Open the work order task WOT0010006**

Click on the questionnaires

Click on start
Fill the form and submit it.

Once you submit the form becomes read only

References:

TITLE	LINK
FSM Best Practices	[best practices](#)
FSM Roles	[Roles](#)

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