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IFS FSM CORE ENTITIES
IFS ESSENTIALS COURSE – IFS FSM™ 6.0
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SENIOR BUSINESS SYSTEMS ANALYST
IFS ACADEMY

This is the agenda for the week's course.
This morning is highlighted in the green box

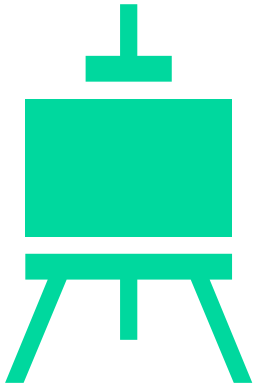

SESSION AGENDA
01
INTRODUCTION
02
SETUP FOR CORE ENTITIES OVERVIEW
03
UNDERSTANDING THE COMPONENTS
04
WRAP UP

OUR TRAINING APPROACH

HOW WE LIKE TO DELIVER TRAINING

Learning Activities

Facilitator-led instruction
System Demos
Take home Exercises
Knowledge Tests



LEARNING ACTIVITIES
Facilitator-led Instruction
We try not to do too much of this, but it's inevitable that some of that we do during the course will involve me taking you through some slides and providing some information about how the system is structured, is designed to work and to show you how to configure the solution.

System Demos
Then, of course, we'll show you what this looks like in the system so that you can fully appreciate what we've been talking about

Hands-On
The most important part of what you'll do while you're here is get the opportunity to do some hands-on work in the training environment. This will always be a bit artificial compared to what you'll do back in the real world, but it's really important to have a go

Activities
These will be designed to give you a break from the screen and add a bit of fun!

Review sessions
This is where we'll aim to consolidate the learning that we've covered and make sure everyone has the basis they need to move on to the next steps

Knowledge Tests
Nothing heavy, just a little self-assessment so that you can check your learning progress and understand where your knowledge gaps are

LEARNING APPROACHES

Outcomes-based
For each lesson we'll set out, at the beginning, what we anticipate you'll be able to do by the end of the course – this means we're focused on what you'll be able to do with the training, not just on the training itself

Field service context-based
Field service is quite a distinctive business area and if you understand a bit about that context, it will really help you to appreciate what IFS customers are looking for when they implement this solution

Practically, functionally-based
We want to teach you things that are useful; whilst the code behind the scenes might be interesting to some, this course is about a practical, functional knowledge base that will allow you to implement the solution

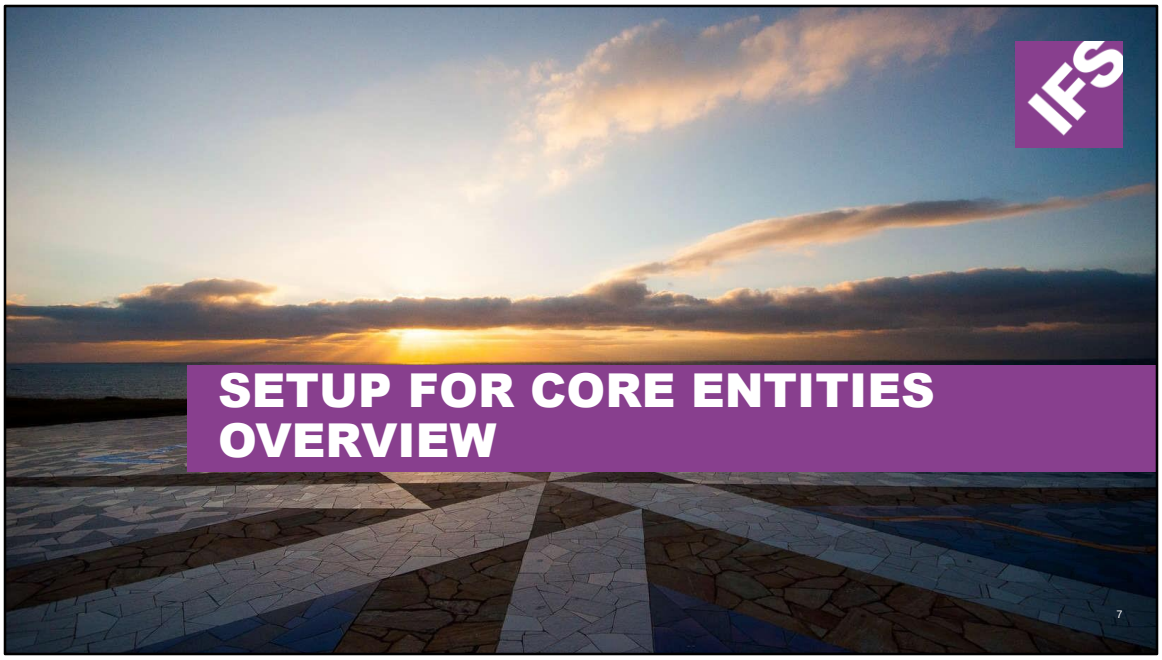
Peer learning
There are people here from different backgrounds, with different experiences; if you get the opportunity to hear and share some of that, you'll find it makes the course more useful and more interesting

SETUP FOR CORE ENTITIES

LEARNING OUTCOMES

By the end of this lesson, you should have:

- Able to distinguish between the types of FSM Core Entities
- The ability to recognize on-the-entity vs. stand-alone records
- An understanding of Work Calendars, notes, teams, contacts
- An understanding of different Code tables
- An understanding of application parameters


IFS
SETUP FOR CORE ENTITIES OVERVIEW
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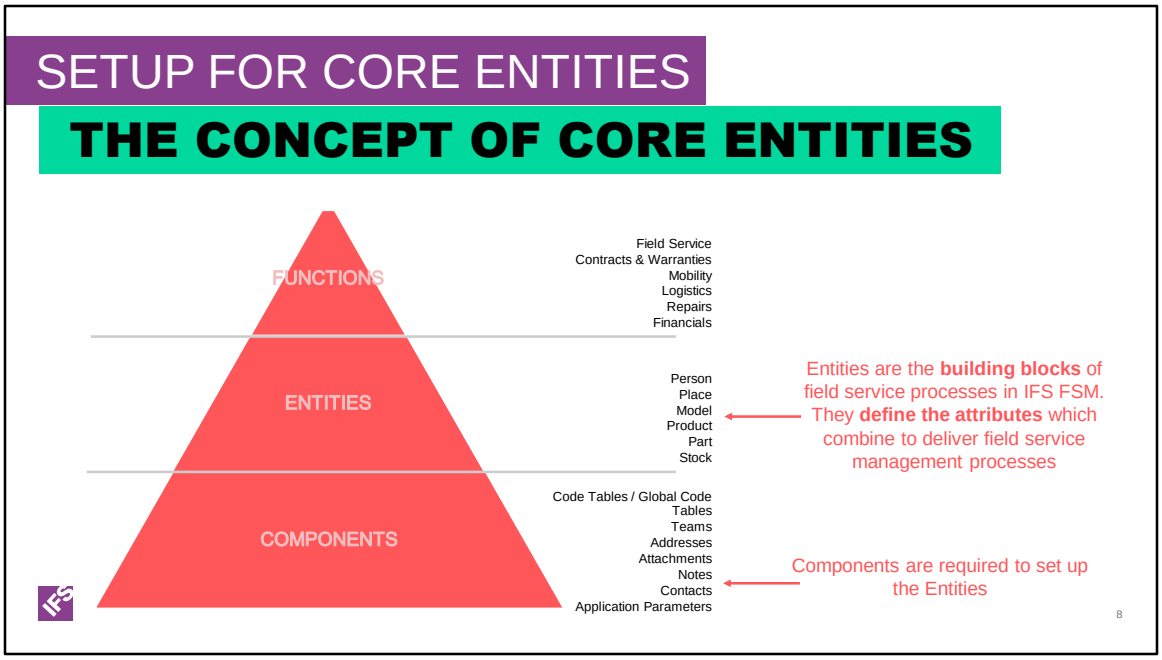
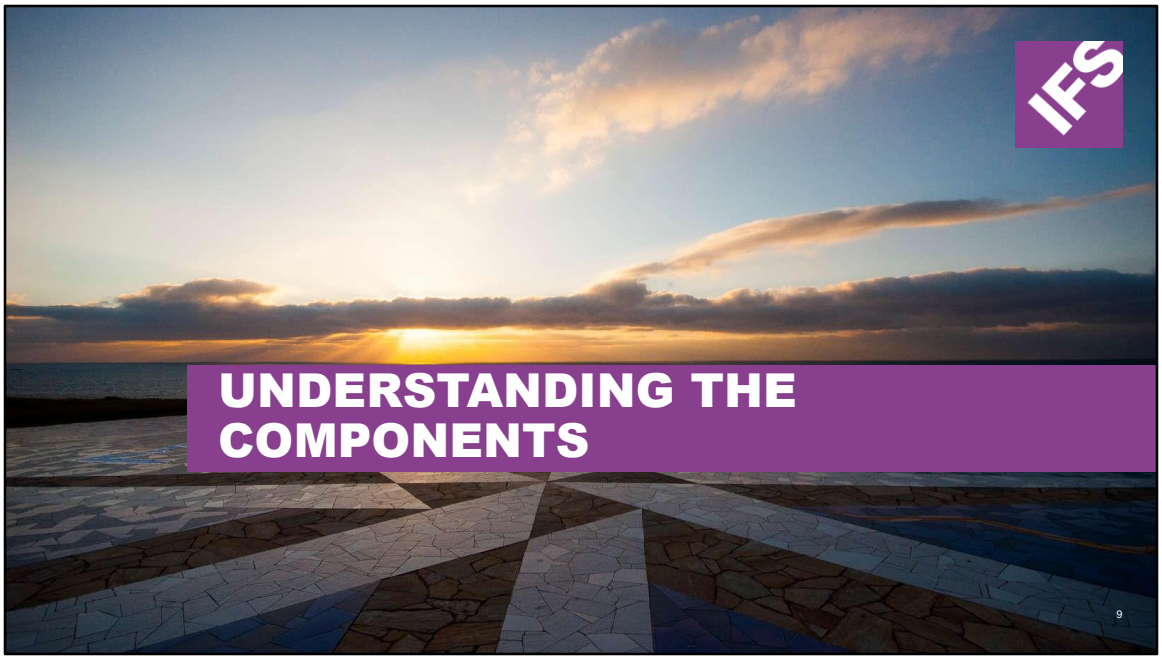


This diagram shows how the building blocks of FSM combine to deliver the FSM core processes. Each functional area (e.g., Financials, Repair Center, Field Service) is separated into individual entities (e.g., person, place, product, part, stock). All the entities work together to provide management of the full service lifecycle. This course, *FSM Core Entities,* will walk you through what is needed to set up the core entities, such as code tables, addresses, contacts, and teams.

The next course, *FSM Core Processes*, will walk you through actual processes, e.g., taking a call, creating a contract.


IFS
UNDERSTANDING THE COMPONENTS
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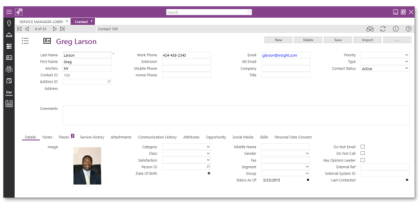
SETUP FOR CORE ENTITIES

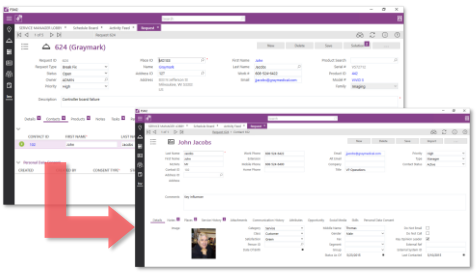
UNDERSTANDING ENTITY RECORDS

- Some records **(Contacts, Addresses, Attachments)** can be created in either 'Stand-Alone' or 'On-The-Entity' modes

STAND ALONE ENTITY RECORD
Create from the Admin Menu
Include more detail



ON-THE-ENTITY RECORD
Create from the Entity itself
Less detail / quick entry



There are certain records that can be created quickly on entities but also can be created in more detail. These records are **address**, **attachment** and **contact.** Examples shown are for **Address**

You can search for and reuse **Addresses**, for example, when a place has multiple addresses associated with it. Addresses can be set up either quick and easy and with less detail on the records themselves or stand-alone in greater detail. To create stand-alone addresses, go to the Admin, Addresses menu. This procedure is used to maintain addresses without having to go to associated records (e.g., task, place, contact, person, request, part need) to access them. You need not set up any records before setting up addresses. If you wish to have the address show up on Bing Maps, you need to fill in the longitude and latitude values.

Similar to Addresses from the **Admin menu, Attachments** from the Admin Menu are more detailed records than the ones created on the entity. You have the ability to edit the file. At a glance you can also see which entity this attachment appears. **Attachments** are files that you can add to most records in IFS FSM both in the smart client and Mobile offerings. Attachments can be files such as service manuals or new attachments created during the service call, or photographs of the product you serviced.

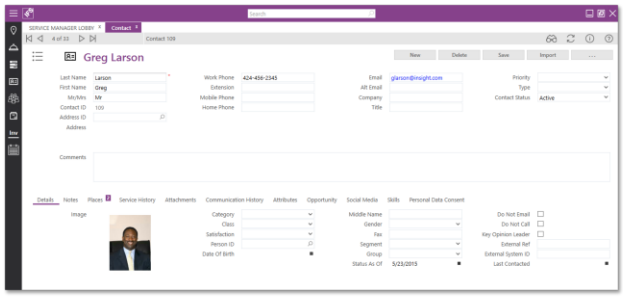
SETUP FOR CORE ENTITIES

CONTACTS

Contacts typically
- End-customers
- Key individuals, e.g. Managers

Contact Record Contains
- Name & Address
- Email
- Phone Numbers

Not used to identify Employees
- These are Person Records



Contacts identify end-customers and key individuals such as managers, project leaders and supervisors at customer sites. Contacts are generally responsible for products or service contracts. The Contact record contains information such as name and address, email address, and phone numbers. Contact records do not identify employees, who are identified using Person records. However, you can create a Person record for a contact, for example when you want the contact to use a portal application.

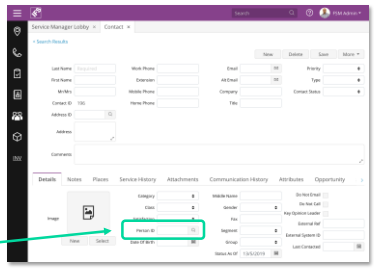
You can create stand alone contact records from the Service, Contact menu item. Or, from the entity, you can create a new record. If the contact already exists in the application, use the **Select** button. An alternate creation of a new record is within the Select button. If you discover the contact you want does not exist, you can click the **New** button (without backing out of the Contact Lookup window) to create a new contact.

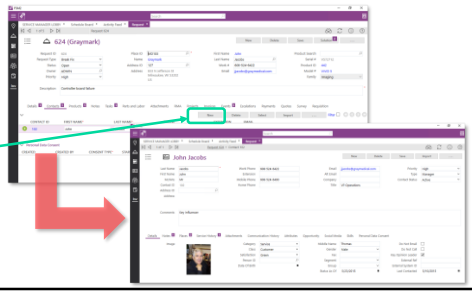
SETUP FOR CORE ENTITIES

CONTACTS

Service Menu >> Contacts

- **Contacts** identify end-customers and key individuals such as managers, project leaders and supervisors at customer sites.
- This is distinct from **Person** records which usually identify employees. Contact and Person records can be associated with one another, eg to provide access to a portal application, to a customer contact
- Contact records can be created stand-alone or on-the-entity.





TIP: Search for an existing Contact record before creating a new one

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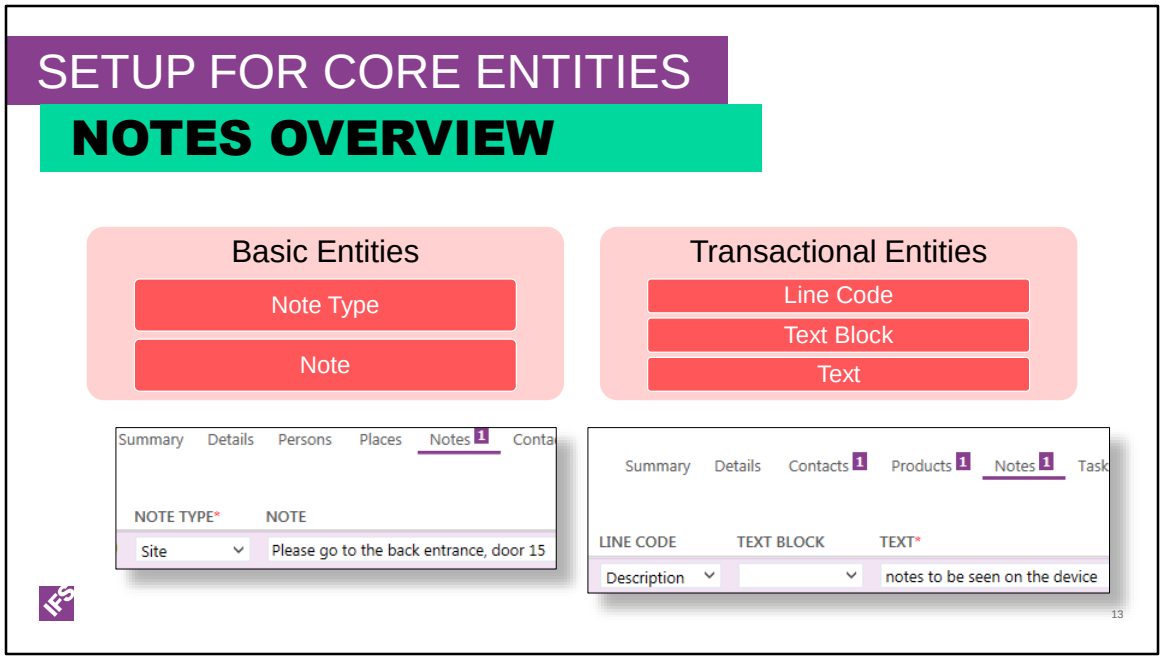
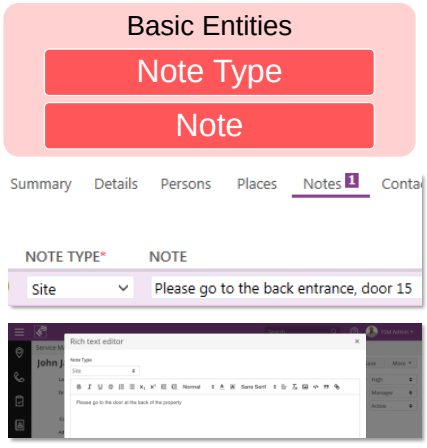


Notes can be added to most core entities in the application. You can use notes to store information related to the record, for example correspondence related to a request or service information for a product.
Users can add additional information to the **basic entities**, e.g., Person, Model, Place, etc. An example for a Place note would be directions to the place. Basic entity notes are internal only notes and typically static information. When the note type has its "Show on UI" option selected, the text of the note appears as a marquee or crawler in the header of the related record. You can hover over the marquee to pause or right-click the marquee to display a menu of options. The marquee setup will be discussed in another course – *IFS FSM Advanced Studio* course.
Users can also add additional information to the **transactional entities**, e.g., Requests, Tasks, Shipment, etc. An example of a Request note would be communication between you and the customer as you resolve their issue. In addition, you can create a block of text that you can use repeatedly. These types of notes can be used for displaying or printing notes.
Text line codes identifies the type of note; can be use to categorize the notes
Text block uses a Text ID field to quickly add pre-formatted text to the text field
Text Note is text that can be formatted using an editor. Formatting is retained when text is pasted into this field.

SETUP FOR CORE ENTITIES

NOTES OVERVIEW



Basic Entities

- Person
- Model
- Place

- Typically Internal or Static Information
  - Directions related to a place

- NOTE TYPE is selected via drop down
- NOTE is free-text

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SETUP FOR CORE ENTITIES

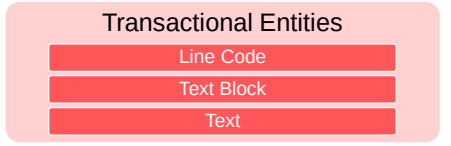
NOTES OVERVIEW

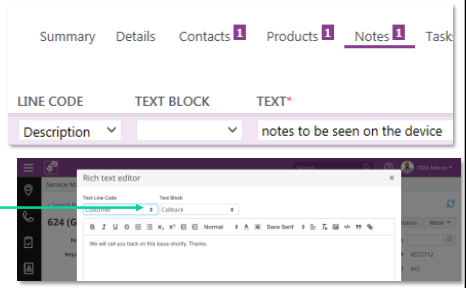
Transactional Entities

- Requests
- Tasks
- Shipments

- Record of one time interaction with customer, related to the issue
  - E.g. Customer reports reoccurrence of previous issue
- LINE CODE is selected via drop down
- TEXT BLOCK is for selecting predefined text blocks
- TEXT is free-text*
  - (can be formatted in external editor)

TIP: Selecting an option from the 'Text Block' field quickly adds the pre-formatted text to the Note





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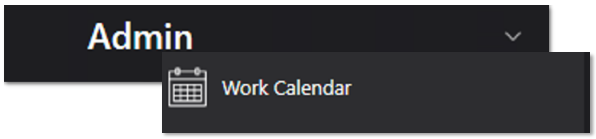
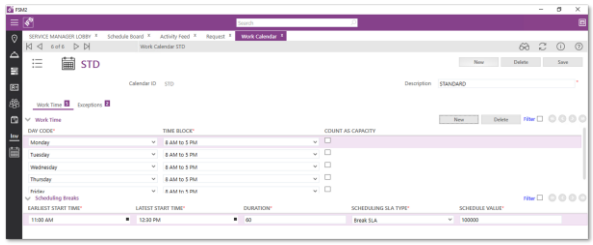
SETUP FOR CORE ENTITIES

WORK CALENDARS

- **Specify Working Hours**
- **Breaks**
- **Exceptions**

- Assigned to:
  - Persons
  - Places



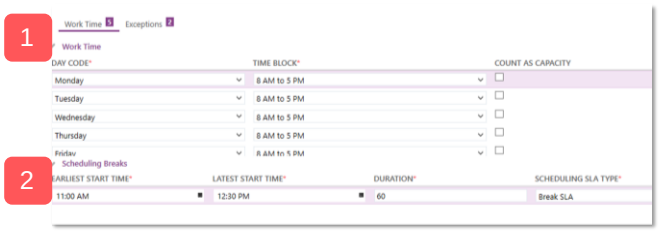


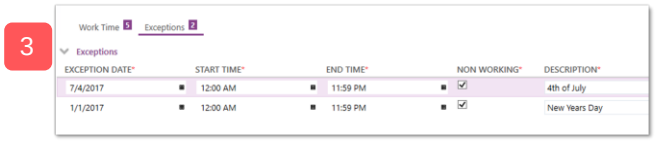
Work calendars (found on the Admin, Work Calendar menu item) are used to specify working hours and exceptions for persons or places. They are used on Schedule Board to assign requests and tasks. You can create multiple calendars and then assign the appropriate calendar to individual places or individual employees. Work calendars **specify hours** to accommodate part-time and split shifts as well as holidays. Work calendars are assigned to each Person and Place record and used for scheduling on the Schedule Board and Repair Board. **Exceptions** include when the person is not available to work, such as vacations or training classes. It can specify as working or non-working and can appear on the Schedule Board in a unique color which must be set up using Color Settings under the Admin menu. The "Non Working" option determines whether work assignment can be performed in the exception period. When not selected, the exception appears on the Schedule Board, but work can still be assigned. When selected, work cannot be assigned.
Work calendars consist of **day codes** and **time blocks.** Day codes are an FSM code table. Time blocks are defined on the time_block code table. You can create any time blocks you need but when you specify time blocks on this tab, they cannot overlap.

SETUP FOR CORE ENTITIES

WORK CALENDARS

1. **Specify Working Hours**
   - **Per Day**
2. **Schedule Breaks**
   - **Lunch**
3. **Exceptions**
   - **Holidays**





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SETUP FOR CORE ENTITIES

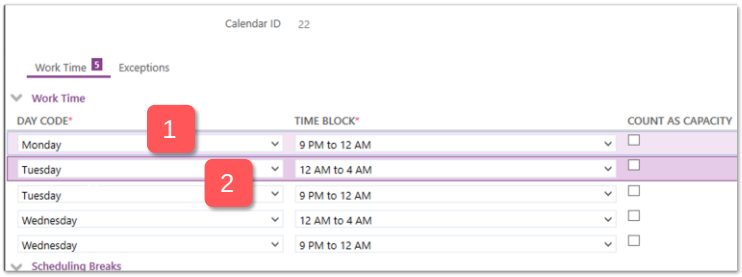
WORK CALENDARS

Overnight Shifts

2 Working Blocks per day are required

1 Up until Midnight

2 Post Midnight



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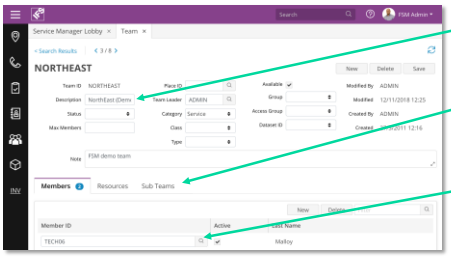
SETUP FOR CORE ENTITIES

TEAMS

Service Menu >> Teams



TIP: Create Teams at levels which match the business organization, eg Region, Department etc

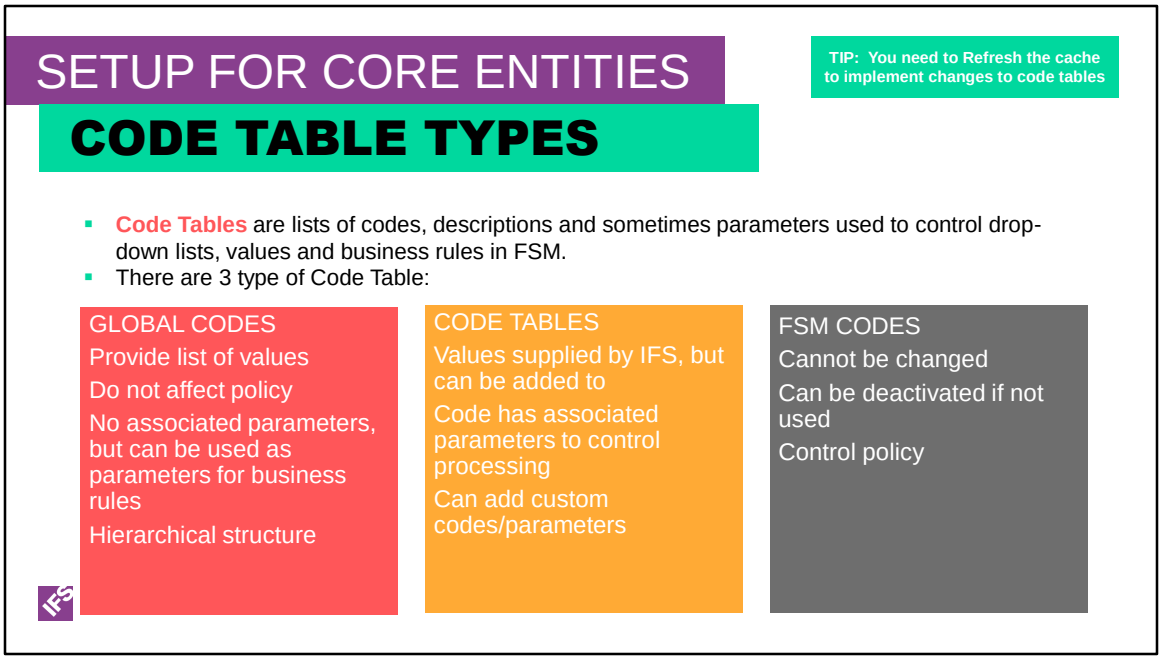
TIP: Sub-Teams can be used to further break down the team structure and assign tasks accordingly

TIP: You can deactivate a Team membership without removing the member from the team (eg for temporary reassignment)

Relating Teams & Persons

1 Create Team → 2 Create Person → 3 Assign Person to Team

Teams used to identify one or more people who compose a group. Because tasks are assigned to teams or team members, a person must be a member of a team before that person can work on a task. The team leader must also be specified as a team member if the team leader can also work on tasks. Therefore, Person records must exist before they can belong to a team. However, teams need to be set up before creation of person records.
Teams can be created by regions (ex., MIDWEST, NORTH, SOUTH) or by departments (ex., RECEIVING, SHIPPING, SALES) – whatever best defines your business.
Max Members allows you to restrict the amount of people you can assign to a team.
Persons assigned to a team can have their team memberships temporarily deactivated without removing them from the team.
For example, you might inactivate a person who is temporarily reassigned to another job function. You can create sub-teams that are subordinate to the specified team. A team can have both members and sub-teams.
Resources are passed to IFS Planning and Scheduling Optimization (PSO) to be able to perform Dynamic Scheduling.
To have work visible on the Schedule Board or Repair Board, you must have teams. In the next slide, we will look at teams on the Schedule Board.



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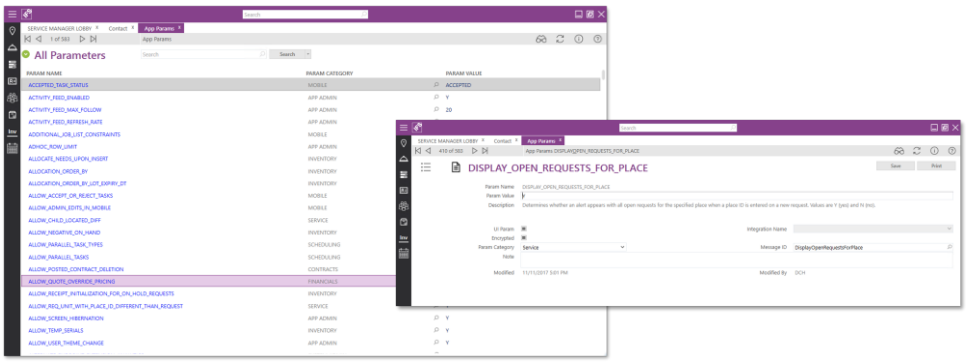
SETUP FOR CORE ENTITIES

APPLICATION PARAMETERS

- **Application Parameters** control different aspects of how users interact with the system. Many application parameters can be changed, but this should be done with great care and understanding of the implications.



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Application parameters control many aspects of how you interact with the user interface. Although many of the application parameters can be changed at any time, do it with caution! Changing some of these parameters after the system has been in operation can adversely affect your system's data. Before making any changes in these fields, be sure that you completely understand how the data will be affected. Note: Changes to the application parameters will not take affect you have refreshed the cache.

There are application parameters that are significant for system administration. These are some of the more important ones.
Client_timeout identifies the number of minutes before the client times out. Value is any positive integer

Logo_image_id_backsplash identifies the image used on the FSM backsplash. Value is any valid image ID as specified in the Image Library of FSM Studio.
Logo_image_id_corner identifies the image used in the upper right-hand corner of all FSM screens.

There are application parameters that are significant for application administration. These are some of the more important ones.
Show_delete_warning determines whether a confirmation appears when attempting to delete a record.
Show_save_warning determines whether a confirmation appears when attempting to save a record.
Show_server_time_only determines whether the FSM client ignores time-zone settings on the client PC and only displays the time on the server. This is important if you have technicians and customers across multiple time zones.

Spell_check_text determines whether automatic spell-checking occurs in FSM. Values are Y (yes) and N (no). Automatic spell-checking dictionaries are available for English, Spanish, French, and German.

Demonstrate how to create detailed Addresses and on the entity Addresses.
Demonstrate how to create detailed Contacts and on the entity Contacts.
Demonstrate how to use Attachments.
Demonstrate Global Codes
- Select Action Status
- Select several others and show that they all have same columns: code, sequence, description, etc.

Demonstrate Code tables (Show that the columns in the code tables vary).
- Select Currency
- Select Text Block, add a Text Block

Demonstrate FSM Code tables (Show that FSM Codes are read-only), but can inactivate them
Select Allow Partials
Show that FSM Codes are read-only
Demonstrate creation of Work Calendars, how they are entered on Persons and Places and how they are used on the Schedule Board.
Demonstrate Notes on a Request, using Text Block from earlier demo step.
Demonstrate Notes on a Person record.
Demonstrate creation of Teams and how they are used on the Schedule Board.


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