

ServiceNow FSM capabilities

By– Mohamed Zakir

- Creation of Work Order from Incident- (Slide 2)
- Work Order Form – (Slide 3)
- Work Order Journey (Slide 4)
- WO & WO Task transition – (Slide 5-14)
- Service Management Incidentals – (Slide-15)
- OOB Values – (Slide 16-19)
- WO & WO Task States – (Slide 20-21)
- Field Service Personas –(Slide 22)

- Work order is created when off-site work is requested
- Here in this example, Workorder is created from Incident form
- Right click on Incident Header and select **Create Work Order** option to create a work order (shown below)

The screenshot displays the 'Incident' form interface. On the left is a dark sidebar with navigation options: Incident, Create New, Assigned to me, Open, Open - Unassigned, Resolved, All, Overview, Critical Incidents Map, Administration, and Incident Properties. The main area shows the incident details for 'INC0010221'. A right-click context menu is open over the incident header, with 'Create Work Order' highlighted in yellow. The incident details include fields for Number, Caller (Robert Downey), Company (Chicago Network Account), Category (Inquiry / Help), Subcategory (-- None --), Service, Service offering, Configuration item, Short description (Incident -> WO demo), and Description (demo). On the right, there are dropdowns for Contact type, State (Resolved), Impact (3 - Low), and Urgency (3 - Low), along with a Priority field set to 5 - Planning. At the bottom right, there are fields for Assignment group (Network Coordinator) and Assigned to.

Incident

INC0010221

Number: INC0010221

* Caller: Robert Downey

Company: Chicago Network Account

Category: Inquiry / Help

Subcategory: -- None --

Service:

Service offering:

Configuration item:

* Short description: Incident -> WO demo

Description: demo

Contact type: -- None --

State: Resolved

Impact: 3 - Low

Urgency: 3 - Low

Priority: 5 - Planning

Assignment group: Network Coordinator

Assigned to:

Context Menu Options:

- Save
- Add to Visual Task Board
- Copy Incident
- Create Outage
- Create Problem
- Create Request
- Create Work Order
- Create Child Incident
- Create Normal Change
- Create Standard Change
- Create Emergency Change
- Refresh Impacted Services
- Metrics Timeline
- Follow on Live Feed
- Show Live Feed
- Configure
- Export
- View
- Create Favorite
- Copy URL
- Copy sys_id





Work Order created from Incident

- After following steps carried out in (slide 3), a new Work order is created from the incident.
- The incident related information is included in Work Order form as highlighted below

<

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Work Order
WO0010236



Follow

▼

UpdateSuspendReady For QualificationCancelDelete

↑

↓

Draft

Awaiting Qualification

Qualified

Assigned

Work in Progress

Complete

Number

WO0010236

Company

Chicago Network Account

🔍

ℹ️

Contact ?

Robert Downey

🔍

ℹ️

Asset ?

🔍

Affected CI ?

🔍

Location ?

🔍

Template ?

🔍

Opened (yyyy-MM-dd
HH:mm:ss)

2021-06-29 03:45:29

Priority ?

5 - Planning

▼

State

Draft

Qualification group ?

🔍

Initiated from ?

INC0010221

ℹ️

Billable ?

☐

* Short description ?

Incident -> WO demo

💡

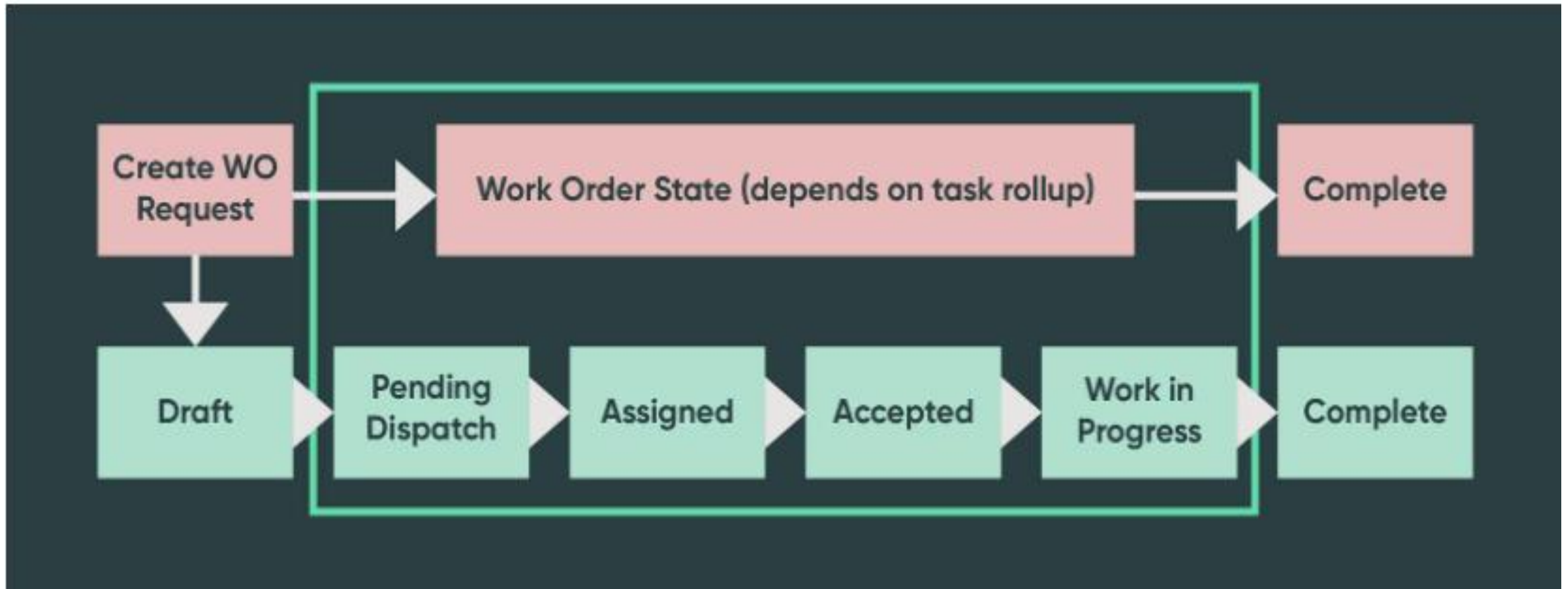
📄

Description

demo

WORK ORDER JOURNEY

- Work orders and work order tasks move through several states from creation to completion.
- Different user roles/persona are required to move work orders from one state to the next, with each role providing an important part of the process.





Number

WOT0010182

**System Generated WO task Number

Parent

WO0010236

**Work order Number

Cloned from ?

Asset ?

🔍

Location ?

New York

🔍

**Refer Slide 17

Template ?

🔍

Skills ?

🔒

Network Support

**Refer Slide 19

Under warranty ?

☐

* Short description ?

Incident -> WO demo

💡

State

Draft

ch group ?

New York Dispatchers

🔍

**Refer Slide 18

Assignment group

🔍

Assigned to ?

🔍

Work Type

🔍

Related Search Results >

Description

demo

Qualification Group refines the definition of the work to be done such as skills, location, sets Dispatch group.

Draft ✓

Pending Dispatch

Assigned

Accepted

Work in Progress

Complete

Number

WOT0010182

Parent

WO0010236

ⓘ

Cloned from

Asset

🔍

Location

New York

🔍

ⓘ

Template

🔍

Skills

🔒 Network Support

Under warranty

☐

* Short description

Incident -> WO demo

💡

State

Pending Dispatch

* Dispatch group

New York Dispatchers

🔍

**Refer Slide 19

* Assignment group

North East

🔍

**Refer Slide 20

Assigned to

Bart Hachey

🔍




**Refer Slide 20

Work Type

🔍

**Refer Slide 18

A dispatch group selects Field agent to complete a work order task.

Planned	Actual	Scheduling								
Window start	2021-08-05 17:39:36									
Window end	2021-08-12 16:42:49									
Scheduled travel start	2021-08-05 13:42:56	** (scheduled start – estimated travel duration)								
Scheduled start	2021-08-05 16:42:56									
Estimated end	2021-08-06 17:42:56	** (scheduled start + estimated work duration)								
Is fixed window	<input type="checkbox"/>									
Acceptance duration	<table border="1"> <tr> <td>Days</td> <td colspan="3">2</td> </tr> <tr> <td>Hours</td> <td>00</td> <td>00</td> <td>00</td> </tr> </table>		Days	2			Hours	00	00	00
Days	2									
Hours	00	00	00							
Estimated travel duration	<table border="1"> <tr> <td>Days</td> <td colspan="3"></td> </tr> <tr> <td>Hours</td> <td>3</td> <td>00</td> <td>00</td> </tr> </table>		Days				Hours	3	00	00
Days										
Hours	3	00	00							
Estimated work duration	<table border="1"> <tr> <td>Days</td> <td colspan="3">1</td> </tr> <tr> <td>Hours</td> <td>01</td> <td>00</td> <td>00</td> </tr> </table>		Days	1			Hours	01	00	00
Days	1									
Hours	01	00	00							

- **Qualifier/Dispatcher** can plan out when WO task to be carried out
- Window start & Window end attributes points to start and end window for task
- **Scheduled start**: Date and time when WO task starts
- **Scheduled travel** : Calculated by system based on (**Scheduled start – Estimated travel duration**)
- **Estimated End**: Calculated by system based on (**Scheduled start + Estimated Work duration**)
- **Acceptance Duration**: Task acceptance Duration for Field Agent

Draft ✓

Pending Dispatch ✓

Assigned

Accepted

Work in Progress

Complete

Number

WOT0010182

Parent

WO0010236

ⓘ

Cloned from

Asset

🔍

Location

New York

🔍

ⓘ

Template

🔍

Skills

🔒

Network Support

Under warranty

☐

* Short description

Incident -> WO demo

💡

State

Assigned

* Dispatch group

New York Dispatchers

🔍

ⓘ

* Assignment group

North East

🔍

ⓘ

Assigned to

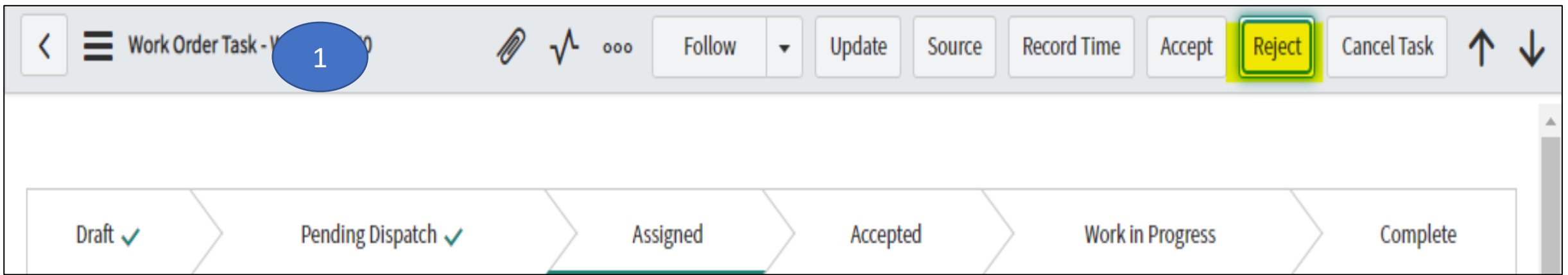
Bart Hachey

🔍

ⓘ

Work Type

Field Service Agent is the one who performs the work on the site. Once task is assigned to field agent, field agent can accept or reject a task



- If Field agent rejects task assigned by Selecting Reject button (**Pic-1**), Then Reject Task dialog box appears asking Reason and Details to reject WO task (shown below)
- (**Pic-2**) shows Dialog Box that appears upon click of Reject Button(**Pic-1**)
- (**Pic-3**) shows OOB options that can be selected as Reason to reject Task

This screenshot shows the 'Reject Task' dialog box. The title 'Reject Task' is followed by a blue circle containing the number '2'. The dialog has a close button (X) in the top right corner. On the left, there are labels 'Reason' and 'Details'. The 'Reason' field is a dropdown menu currently showing 'Schedule conflict'. The 'Details' field is a large yellow text area. At the bottom right are 'Cancel' and 'OK' buttons.

This screenshot shows the dropdown menu for the 'Reason' field. A blue circle containing the number '3' is positioned over the top of the menu. The menu lists the following options: 'Schedule conflict' (highlighted), 'Skills mismatch', 'Location mismatch', 'Duplicate task', 'Parts unavailable', 'Customer unavailable', 'Auto reject', and 'Other'. A dropdown arrow is visible in the top right corner of the menu.

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Work Order Task - WOT0010182

Follow

▼

Update

Source

View Task On Map

Record Time

Start Travel

Start Work

Cancel Task

Draft ✓

Pending Dispatch ✓

Assigned ✓

Accepted

Work in Progress

Complete

Number

WOT0010182

Parent

WO0010236

ⓘ

Cloned from

Asset

Location

New York

🔍

ⓘ

Template

Skills

🔒

Network Support

Under warranty

☐

* Short description

Incident -> WO demo

💡

State

Accepted

* Dispatch group

New York Dispatchers

🔍

ⓘ

* Assignment group

North East

🔍

ⓘ

Assigned to

Bart Hachey

🔍

ⓘ

Work Type

When Task is accepted by Field agent, Field Agent has option to Start travel, Start Work

< ☰ Work Order Task - 1 38 📎 📈 ⋮ Follow ▾ Update Source Record Time Start Travel Start Work Cancel Task ↑ ↓

Draft ✓ Pending Dispatch ✓ Assigned ✓ Accepted Work in Progress Complete

- If Field agent clicks **Start Travel button** (Pic-1), the time Field agent started travelling is captured in **Actual travel start** attribute of WO task form (Pic-2).
- If Field agent clicks **Start Work button**, the time Field agent started working is captured in **Actual work start** attribute of WO task form (Pic-2)

Planned Actual Scheduling 2

Actual travel start	2021-08-05 17:34:22	Actual travel duration	11 Seconds
Actual work start	2021-08-05 17:34:33	Actual work duration	
Actual work end	<input type="text"/>	Actual duration	



Follow



Update

Pause Work

Source

Record Time

Close Complete

Close Incomplete

Cancel Task

Draft ✓

Pending Dispatch ✓

Assigned ✓

Accepted ✓

Work in Progress

Complete

Number WOT0010182

Parent WO0010236 ⓘ

Cloned from

Asset

Location New York ⓘ

Template

Skills Network Support

Under warranty ☐

* Short description Incident -> WO demo ⓘ

State Work In Progress

Dispatch group New York Dispatchers ⓘ

* Assignment group North East ⓘ

* Assigned to Bart Hachey ⓘ

Work Type

- After finishing task, field agent can select close complete/close Incomplete option.
- Close Complete/Close Incomplete button actions are detailed out in next slides

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Work Order Task - 10

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Follow

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Update

Pause Work

Source

Record Time

Close Complete

Close Incomplete

Cancel Task

- If Field agent clicks **Close Complete button** (PIC-1), Field agent **must** provide summary of work done in work notes.
- After Close Complete button is clicked, The time Field agent completed his work is captured in **Actual Work end** attribute (Pic-2).
- Actual Travel Duration: Calculated by System (**Actual work start-Actual travel start**)
- Actual Work Duration: Calculated by System (**Actual work end-Actual work start**)

Planned

Actual

Scheduling

2

Actual travel start	2021-08-05 17:34:22	Actual travel duration	11 Seconds
Actual work start	2021-08-05 17:34:33	Actual work duration	14 Minutes
Actual work end	2021-08-05 17:49:10	Actual duration	14 Minutes

<

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Work Order Task - V

1

8

Follow

▼

Update

Pause Work

Source

Record Time

Close Complete

Close Incomplete

Cancel Task

- If Field agent clicks **Close Incomplete button** (PIC-1), Dialog Box appears(Pic-2)
- If **Create a follow on task?**(Pic-2) is selected **Yes**, then **NEW WO task** will be created and current Wo task will be closed
- If **Create a follow on task?**(Pic-2) is selected **No**, then current Wo task will be closed

Close Incomplete

2

Create a follow on task?

Yes

▼

Reason for the incomplete closure

free text

Cancel

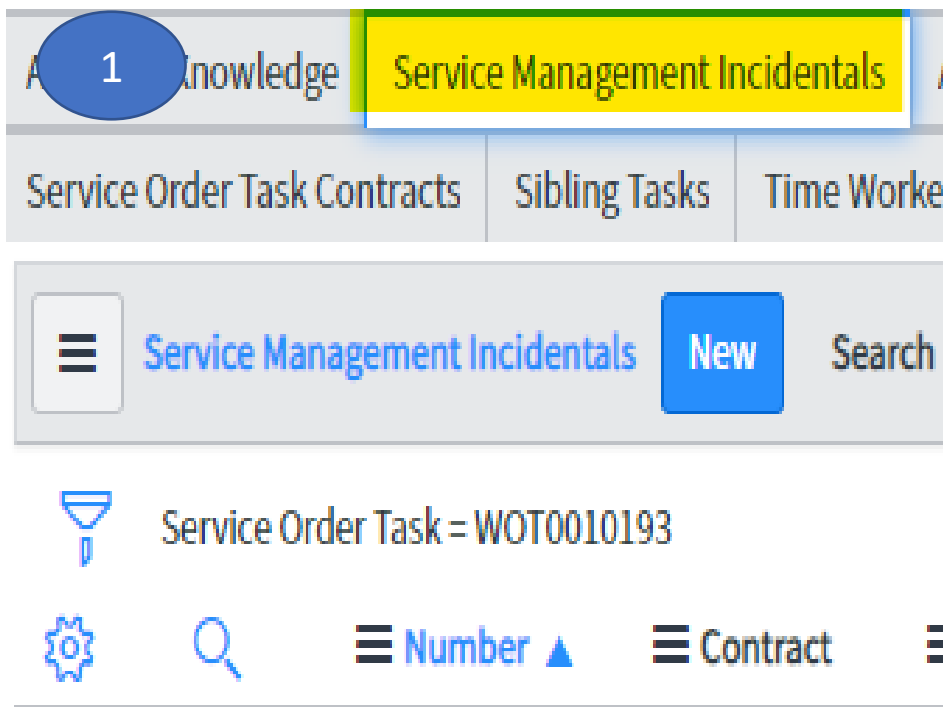
OK

Service Management Incidentals (Optional OOB functionality)

Record incidental expenses associated with your business travel through the Field Service application to execute work order tasks.

Procedure

- 1.Navigate to Field Service > Work Order > All Work Order Tasks.(**Pic-1**)
- 2.Open a work order task for which you want to log incidentals.
- 3.In the Service Management Incidentals related list, click New. (**Pic-2**)
- 4.Fill in the fields (**Pic-2**)



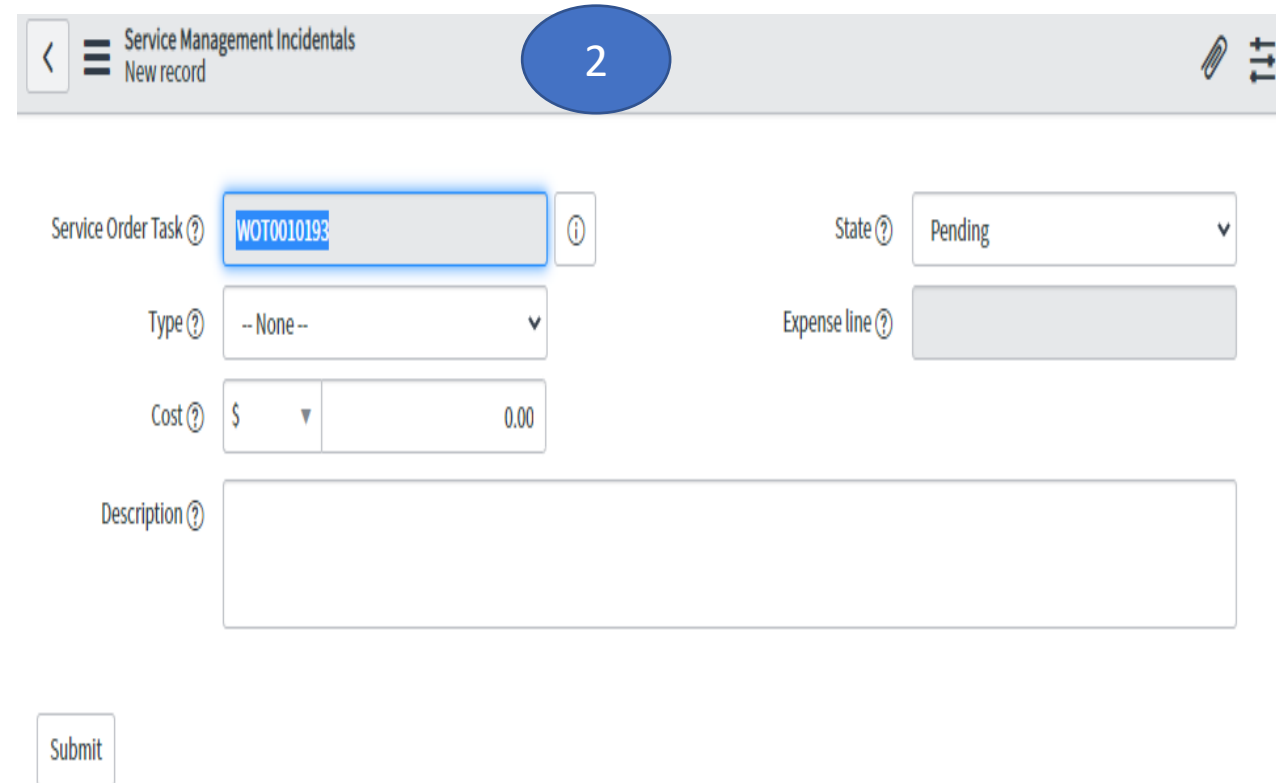
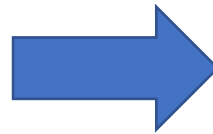
1 Knowledge Service Management Incidentals

Service Order Task Contracts Sibling Tasks Time Work

Service Management Incidentals New Search

Service Order Task = WOT0010193

Number Contract



Service Management Incidentals New record

2

Service Order Task ? WOT0010193

Type ? -- None --


Cost ? \$ 0.00














Description ?









State ? Pending

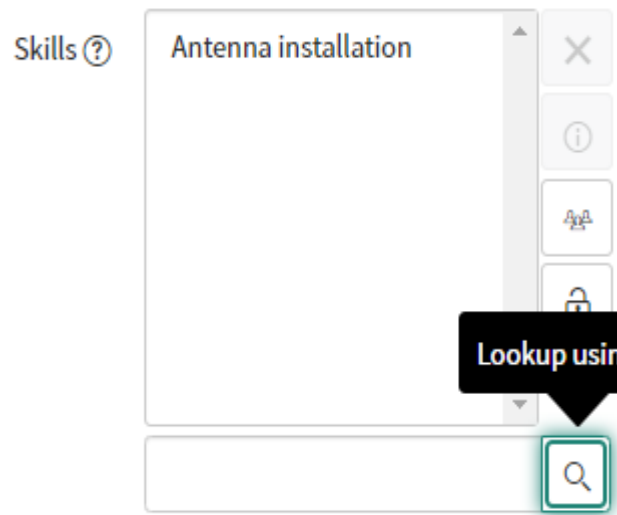
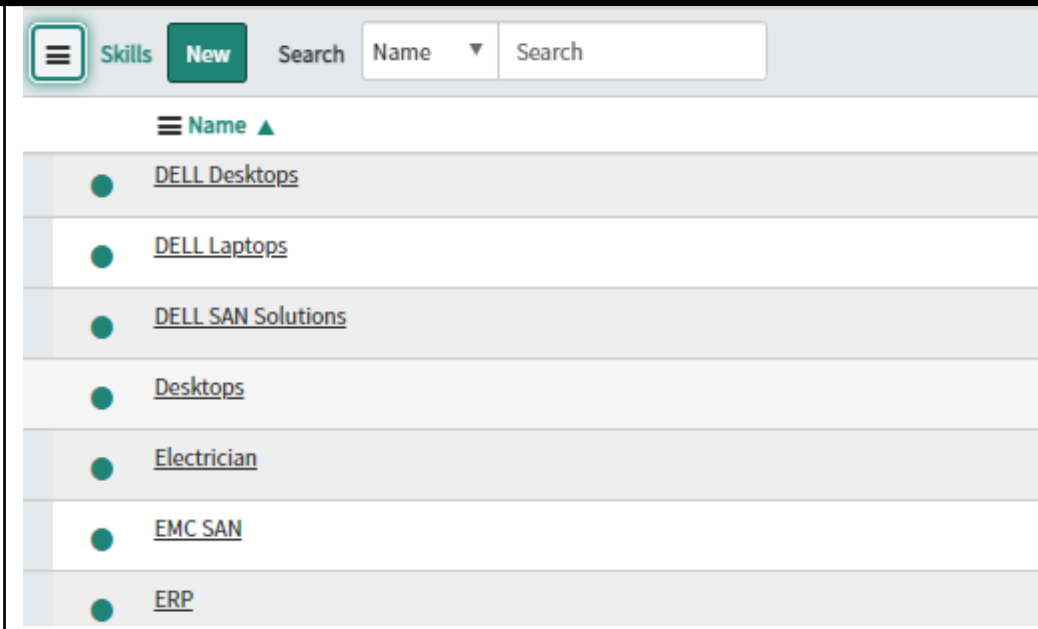
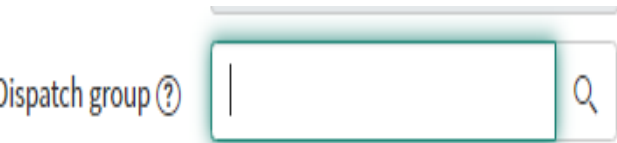
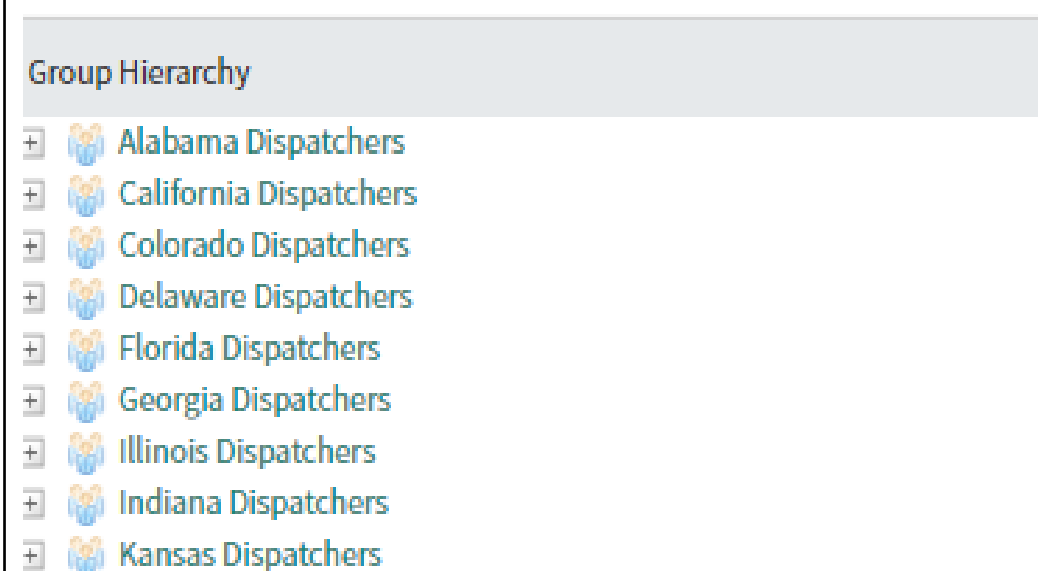
Expense line ?





Submit

- A **Choice Field list** is a type of field that lets the user select from a pre-defined set of choices. It is identified by drop down arrow beside it
- A **Reference field** stores a reference to a field on **another table** in ServiceNow. It's identified by  (magnifying glass icon) beside it

Field on Incident Form	Field Type	Description	Reference to another Table
<div>Location ? <input type="text"/>  </div>	Reference Field (Referencing to location table in ServiceNow)	Area where the work must be done. If not entered manually, the field is filled automatically based first on the Affected CI field and then the location of Caller .	<div>Locations Hierarchy</div> <div>  1201 Peachtree St NE,Atlanta,GA  123 Lake View Dr,Santa Clara,CA  200 South James street,Atlanta, GA  2215 Lawson Lane,Santa Clara,CA  2855 Stevens Creek Blvd,Santa Clara,CA  32100 S Las Vegas Blvd,Primm,NV  3260 Jay Street, Santa Clara, CA  3501 Quadrangle Blvd,Orlando,FL  555 Jay Street,Santa Clara,CA  6041 Edgewood Bend Ct, San Diego</div>

Field on Incident Form	Field Type	Description	Reference to another Table
<div>Qualification Group</div> <div><div>Qualification group</div><div><div></div><div>Q</div></div></div>	<div>Reference Field.</div> <div>(Referencing to Group table in Snow. Will filter out groups with dispatch role associated to it)</div>	<div>Group that can specify the technical details of the work order. The lookup list shows only the qualification groups associated with the selected Location</div>	<div>Group Hierarchy</div> <div><div>+  Central Qualifiers</div><div>+  East Qualifiers</div><div>+  Karnataka Network Qualifiers</div><div>+  North Karnataka Qualifier</div><div>+  West Qualifiers</div><div>+  WM Qualifiers</div></div>
<div>Work Type</div> <div><div>Work Type</div><div><div></div><div>Q</div></div></div>	<div>Reference Field.</div> <div>(Referencing to Work Type table in Snow)</div>	<div>The type of work to be performed to complete the task</div>	<div><div><div><div>☰</div><div>Work Types</div><div>New</div></div><div><div>Search</div><div>Name ▼</div><div>Search</div></div><div><div>◀◀◀</div><div>1</div><div>to 3 of 3</div></div></div><div><div> All</div><div><div></div><div><div>≡</div><div>Name ▲</div></div></div><div><div>Search</div><div><div><div>●</div><div>Break Fix</div></div><div><div>●</div><div>Install</div></div><div><div>●</div><div>Planned Maintenance</div></div></div></div></div></div>

Field on Incident Form	Field Type	Description	Reference to another Table
Skills 	Reference Field. (Referencing to Skills table in Snow)	Abilities necessary to execute the task	
Dispatch Group 	Reference Field. (Referencing to Group table in Snow. Will filter out groups with dispatch role associated to it)	Group that can select an agent to complete the task	

Field on Incident Form	Field Type	Description	Reference to another Table
<div>Assignment group</div> <div><input type="text"/></div>	Reference Field. (Referencing to Group table in Snow)	Group from which an individual should be selected to complete the task.	<div>Group Hierarchy</div> <div><div><div>+</div><div></div><div>External Group Demo-1</div></div><div><div>+</div><div></div><div>Field Services Vendors</div></div><div><div>+</div><div></div><div>FSOSP - Group</div></div><div><div>+</div><div></div><div>South East</div></div></div>
<div>Assigned to ?</div> <div><input type="text"/></div>	Reference Field. (Referencing to User table in Snow)	Select an individual agent who should complete the task, selected from the Assignment group	<div><div><div><div>≡</div><div>Users</div><div>New</div><div>Search</div><div>for text</div><div>Search</div></div><div><div>1</div><div>to 3 of 3</div></div></div><div><div><div>⌵</div><div>All</div></div><div><div><div>🔍</div><div>≡ Name</div><div>≡ First name</div><div>≡ Last name</div><div>≡ Email</div></div><div><div>Search</div><div>Search</div><div>Search</div><div>Search</div></div><div><div><div><div>●</div><div>Valerie Pou</div></div><div>Valerie</div><div>Pou</div><div>valerie.pou@example.com</div></div><div><div><div><div>●</div><div>Dollie Daquino</div></div><div>Dollie</div><div>Daquino</div><div>dollie.daquino@example.com</div></div><div><div><div><div>●</div><div>George Grey</div></div><div>George</div><div>Grey</div><div>george.grey@example.com</div></div></div></div></div></div></div></div>

Work order states

Work order state	Description
Draft	The initiator creates a work order and adds information to the work order form about the work to be done.
Awaiting Qualification	The work order is ready to be reviewed by the qualifier.
Qualified	The qualifier has added any necessary technical information to the work order, created tasks, added part requirements, and assigned a dispatch group.
Assigned	The dispatcher assigns one or more of the work order tasks to a field service agent.
Work in Progress	The agent accepts the assigned work order task and begins work.
Closed Complete	The agent completes the work in the assigned task. Once all of the tasks for a work order are complete, the state of the work order is set to complete.
Closed Incomplete	The agent does not complete the work in the assigned task. If one or more tasks for a work order are closed incomplete, the state of the work order is closed incomplete.
Canceled	The work is no longer necessary, or the work order is a duplicate. A reason for canceling the work order must be added to the Work notes field.

Work order task states

Work order task state	Description
Draft	The qualifier creates a task for a work order.
Pending Dispatch	The qualifier assigns a dispatch group to the work order task.
Assigned	The dispatcher assigns the work order tasks to a field service agent.
Accepted	The field service agent accepts the assigned task. The agent can also reject a task. If rejected, the task state returns to Pending Dispatch.
Work in Progress	The field service agent clicks Start Travel on the Work Order Task form, followed by Start Work, and begins the work described in the task.
Closed Complete	The field service agent completes the work for the assigned task, adds a description in the Work notes field, and clicks Close Complete on the Work Order Task form. The agent can also click Close Incomplete and add a reason for the incomplete closure.
Closed Incomplete	The field service agent cannot complete the work for the assigned task, adds a reason for the incomplete closure in the Work notes field, and clicks Close Incomplete.
Canceled	The work order task is no longer necessary or is a duplicate of another task. The field service agent adds a reason for the cancellation in the Work notes field and clicks Cancel

Field Service Management Persona

Persona	Description	Role (SNow)
Field Service administrator	Field Service administrator has full control over all Field Service data and is responsible for configuring and maintaining field service application	wm_admin
Field Service Agent	Field Service Agent performs works at site/customer location and record details in work order form	wm_agent
Field Service Dispatcher	Dispatcher schedules tasks and assign tasks to Field Service Agents	wm_dispatcher
Field Service Initiator	Creates a work order and assigns to a qualification group	wm_initiator
Field Service Manager	Field Service Manager manages field agent schedules, skills and timecards of their groups.	wm_manager
Field Service Qualifier	Qualifier reviews and qualifies work order request by creating work order tasks and validating skills and location.	wm_qualifier