

## ServiceNow Field Service Management (FSM) Implementation

Duration: 2 Days    Course Code: SNFSMI    Delivery Method: Closed Events

### Overview:

ServiceNow® Field Service Management (FSM) helps companies efficiently manage location-based work tasks. Field Service Management Implementation focuses specifically on field service management applications and related functionality, most of which may be configured during an implementation using a low-code or no-code approach. Field Service Management Implementation provides practical skills to accelerate field service management implementations.

### Company Events

These events can be delivered exclusively for your company at our locations or yours, specifically for your delegates and your needs. The Company Events can be tailored or standard course deliveries.

### Target Audience:

The ServiceNow® Field Service Management Implementation course is for Customers, Partners, and Employees who implement features, functions, and data associated with field service management.

### Objectives:

- In this two-day interactive course attendees gain the skills for the effective implementation of the ServiceNow Field Service Management application. This course is designed for Implementation Specialists responsible for set-up and configuration of the Field Service Management applications. A combination of lecture, group discussions, group activities, and lab work helps attendees develop skills to achieve the following:
  - Configure central dispatch and dynamic scheduling
  - Automate transfer order line task assignment using flow designer
  - Configure appointment booking service
  - Configure advanced time recording and time sheet policy
  - Create a targeted communication
  - Configure contextual knowledge for work orders and work order tasks
  - Configure field service mobile application
- Validate foundational data
- Analyze and implement customer business requirements
- Use industry good practice for field service management implementation
- Discuss common field service management integration scenarios and good practices
- Set-up field service business and assignment configuration
- Configure work order form and mandatory skills
- Create advanced maintenance plans and maintenance schedules

### Prerequisites:

- SNF - ServiceNow Fundamentals
- SNFSMF - ServiceNow Field Service Management (FSM) Fundamentals

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## Content:

### 1: Field Service Management Implementation Planning

- FSM features, process, and data review
- Field service industry good practices
- FSM implementation good practices
- Process Integrations
- Foundation data planning

### Lab 1.1 Prepare to Implement Field Service Management

### Module 2: Implementing Field Service Processes

- Validate Foundation Data
- Configure Field Service Process, Assignment, and Add-ons
- Configure Work Order Creation
- Configure Time Recording

### Lab 2.1 Validate Foundation Data

### Lab 2.2a Configure Approval Workflow

### Lab 2.2b Field Service Configuration

### Lab 2.3a Configure Mandatory Skills

### Lab 2.3b Create a Work Order Template

### Lab 2.4 Create an Advanced Maintenance Plan

### Lab 2.5 Configure Advanced Time Recording

### Module 3: Optimizing Inventory ; Scheduling Operations

- Scheduling and Dispatch Configurations
- Dynamic Scheduling Configuration
- Parts Sourcing and Transfer Process automation

### Lab 3.1a Configure Central Dispatch

### Lab 3.1b Configure Dynamic Scheduling

### Lab 3.2 Automate Transfer Order Line Task Assignment using Flow Designer

### Module 4: Implementing Field Service Mobile

- Agent Mobile Application Overview
- Field Service Mobile Configurations
- Mobile Migration Considerations

### Lab 4.1 Configure VIP Tasks Applet

### Module 5: Implementing Related Processes

- Customer Experience Configurations
- Appointment Booking Configuration
- Configure Targeted Communications
- Configure Field Service Knowledge Base and Contextual Search

### Lab 5.1a Configure Appointment Booking

### Lab 5.1b Appointment Booking – Advanced Availability Configuration

### Lab 5.2 Create a Targeted Communication and Notification

### Lab 5.3 Configure Contextual Knowledge for the Field Service Knowledge Base

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## Further Information:

For More information, or to book your course, please call us on 00 966 92000 9278

[training@globalknowledge.com.sa](mailto:training@globalknowledge.com.sa)

[www.globalknowledge.com/en-sa/](http://www.globalknowledge.com/en-sa/)

Global Knowledge - KSA, 393 Al-Uroubah Road, Al Worood, Riyadh 3140, Saudi Arabia