

ServiceNow Field Service Management (FSM) Implementation

Duration: 2 Days Course Code: SNFSMI Delivery Method: Virtual Classroom

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.

Virtual Learning

This interactive training can be taken from any location, your office or home and is delivered by a trainer. This training does not have any delegates in the class with the instructor, since all delegates are virtually connected. Virtual delegates do not travel to this course, Global Knowledge will send you all the information needed before the start of the course and you can test the logins.

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
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Prerequisites:

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

Further Information:

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

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