ServiceNow Field Service Management (FSM) Implementation

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

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.

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. This is done through a combination of lecture, group discussions, group activities, and lab work.

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:

Customers, Partners, and Employees who implement features, functions, and data associated with field service management.

Objectives:

- **After you complete this course you will be able to:**

- 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

- 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

Prerequisites:

Attendees should meet the following prerequisites:

ServiceNow recommends that attendees have three to six months of hands on experience with the ServiceNow Platform and specifically involved in one or two Field Services implementation projects before attempting the Certification Exam.

- Certified System Administrator (CSA)
- Certified Implementation Specialist (CIS)

- Field Service Management Fundamentals (On Demand Only)
- SNPI - ServiceNow Platform Implementation
- SNSAF - ServiceNow Administration Fundamentals

Content:

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

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

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

Implementing Field Service Mobile

- Agent Mobile Application Overview
- Field Service Mobile Configurations
- Mobile Migration Considerations
- Lab 4.1 Configure VIP Tasks Applet

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 Head Office 01189 123456 / Northern Office 0113 242 5931

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