

# SERVICENOW FIELD SERVICE MANAGEMENT (FSM) FUNDAMENTALS

Course Code: 821235

Learn how ServiceNow® Field Service Management (FSM) makes integrated and proactive service possible.

Create work order requests using a variety of methods, qualify work order requests to ensure all relevant information is captured before a field agent is dispatched, and use drag and drop to match tasks to field agents based on location, schedules, skills, and available inventory. Use the mobile user interface to perform task work on location, with or without an internet connection.

In this self-paced, on demand course, attendees master the usage of ServiceNow Field Service Management applications and modules. This course is designed for field service process users or fulfillers who will use the Field Service application and modules, as well as administrators or implementers responsible for configuring or maintaining the Field Service application and modules. A combination of process overviews, use cases, how-to steps, demonstration videos, and simulations helps attendees develop a holistic view of the core field service persona roles and responsibilities.

## What You'll Learn

Students will learn to,

- Define Field Service
- Identify the types of Field Service and the four Field Service models
- Identify Field Service Management process lifecycle phases and personas
- Create Work Order Requests
- Qualify Work Order Tasks
- Describe geolocation and its benefits when using ServiceNow Field Service Management
- Create and manage team schedules and skills
- Dispatch Work Order Tasks
- Update and close Work Order Tasks
- Summarize Field Service Reporting and Performance Analytics capabilities

## Who Needs to Attend

The ServiceNow® Field Service Management (FSM) Fundamentals On Demand course is for Customers, Partners, and Employees who use features, functions, and data associated with field service management.

An attendee is a good fit for this course if they perform or advise on any of the following roles or job responsibilities:

- Field Service Process User/Fulfiller
- Business Process Analyst/Consultant
- Field Service Application Administrator
- ServiceNow System Administrator

#### Prerequisites

ServiceNow Administration Fundamentals

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## On-Demand Outline

### **Module 1: Introduction to Field Service Management**

- Welcome to Field Titans!
- Field Service Management Overview
- ServiceNow Field Service Management Infographic
- Field Service Management Personas and Roles
- ServiceNow Field Service Management Process

### **Module 2: Work Order Initiation**

- Work Order Initiation at Field Titans
- Workflow States
- Work Order Initiation Process

### **Module 3: Work Order Qualification**

- Work Order Qualification at Field Titans
- Work Order Qualification Process

### **Module 4: Scheduling and Dispatch**

- Work Order Scheduling and Dispatch at Field Titans
- Scheduling and Dispatch Personas and Key Features
- Scheduling and Team Management
- Scheduling and Dispatch Management

### **Module 5: Delivery and Confirmation**

- Work Order Delivery and Confirmation at Field Titans
- Delivery and Confirmation Personas and Key Features
- Field Service Agents Infographic
- Review and Perform Tasks - Desktop
- Review and Perform Tasks - Mobile
- Time Reporting for Field Service

### **Module 6: Analyze and Improve**

- Analysis and Improvement at Field Titans

- Field Service Reporting and Performance Analytics Overview

## **Module 7: Field Service Management Process Simulator Request a Lab Instance**

- Instance Help
- Field Service Management (FSM) Fundamentals Simulator - Introduction
- Initiation: Create a Work Order using a Work Order Template
- Initiation: Create a Work Order without using a Work Order Template
- Qualification: Qualify Work Order Tasks
- Scheduling and Dispatch: Dispatch Work Order Tasks
- Delivery and Confirmation: Accept, Start Work, Record Time, and Close Tasks

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