High Velocity Field Service Management with JSM

PRESENTERS

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Field Service Management (FSM) coordinates and optimizes service delivery for a mobile workforce. Field Service Management shares key features with IT Service Management (ITSM), yet ITSM tools are not built to handle the specific demands of a field-based workforce. The *High Velocity Field Service Management for Jira Service Management (JSM Field Service)* brings transparency and efficiency to every field services project, empowering your employees to be more effective and productive. Field service technicians and supervisors can use this solution on their mobile device to perform preventative or recurring maintenance activities while on the go. Field service staff and managers can take full control of current projects, optimize route planning, create and update maintenance requests, and track assets and work orders in real time. This solution allows businesses with a mobile workforce to streamline operations, boost productivity, and use timely data to make informed decisions.

Field Service Management optimizes resource allocation and service delivery.

In addition to work order management, customer management, and SLA management, field service management has some unique characteristics:

1. Field employees often cover large geographies, and coordination among a widespread group of technicians and specialized teams presents unique challenges.

2. Field technicians are mobile workers. Mobile device access is a critical component of any FSM solution. Field workers must be able to work effectively while online or offline in remote or low-network environments.

3. Field applications vary widely, covering different use cases and industry verticals. Software customization and automation are critical to allow customers to easily configure what data is being displayed or captured, how the data is being used, and how each role can access the data.

4. An increased focus scheduling, dispatching, real-time tracking and reporting. For example, FSM tools need to track the exact location of technicians to determine how long it will take to travel between jobs.

5. Asset management is critical, as the turnaround time to fix issues with incorrect, missing, or damaged parts can add significant time to delivery.

To address these challenges, T4S Partners and Magic Software jointly developed *JSM Field Service* on top of Atlassian's Jira Service Management.

### Benefits of High Velocity Field Service Management for JSM

- **Out of the box mobile field service solution** built on Atlassian Jira Service Management

- **Streamline work orders**—automate, monitor and track work orders from a centralized dashboard—easily create, enable access, assign to staff

- **Parts management**—track availability and location of parts

- **Customized dashboards** with optimized data display, prioritizing the most relevant information for each role or persona

- **Geolocation and routing**—enhance route optimization; improve efficiency of service technicians

- **Task List**—assign, automate and manage task list for field workers efficiently

- **Utilize user personas** with tailored dashboards and functionality for each class of user

- **Work offline** when connectivity is not available

- **Use push notifications** for real-time alerts and updates

- **Automatically track** time spent on each work order and real-time location of each technician

- **Comprehensive support** for all modern iOS and Android devices, including phones and tablets

- **Fully customizable** to support your organizations workflows

- **Leverage device camera**—scan bar codes, take pictures, scan and upload documents

## Watch JSM Field Service in action.

The team demonstrated the JSM Field Service solution by focusing on three personas:

- **Technicians.** Primarily in the field doing work through a mobile app.

- **Supervisors.** Supervisors are responsible for a mix of supervisory and field work, so they use both the mobile app in the field and web-based reporting interfaces in the office.

- **Administrators.** Manage and configure the FSM and JSM software platforms.

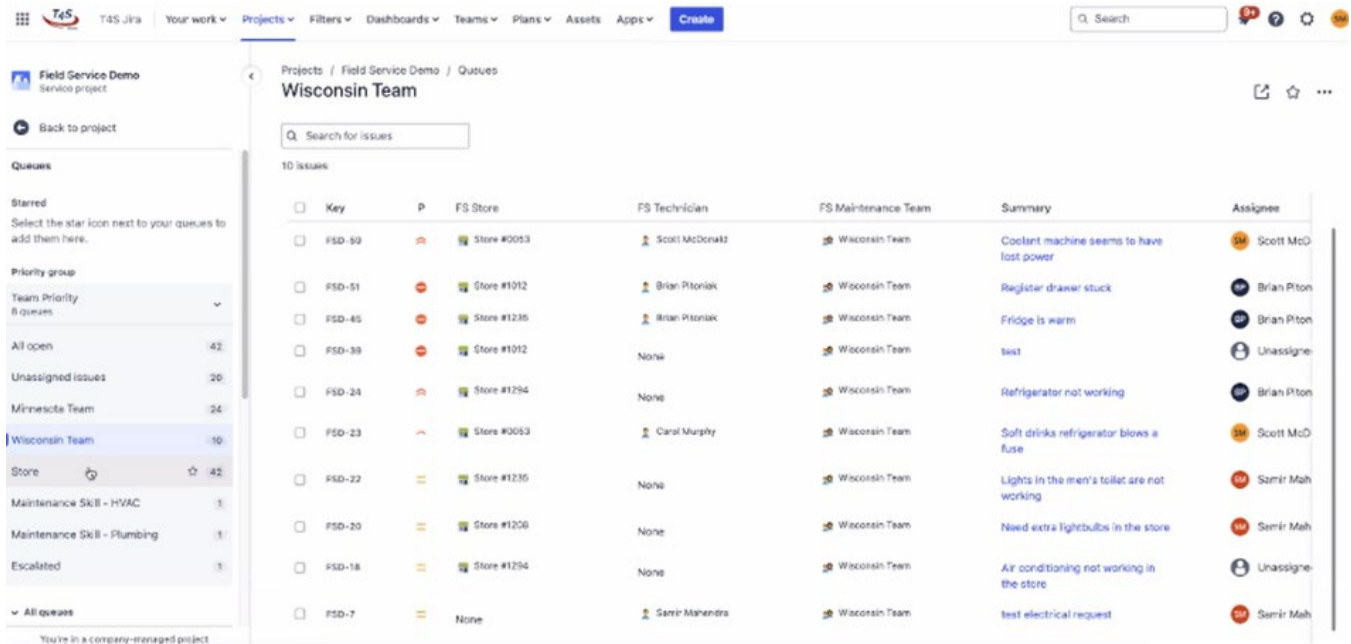| TECHNICIANS	SUPERVISORS	ADMINS
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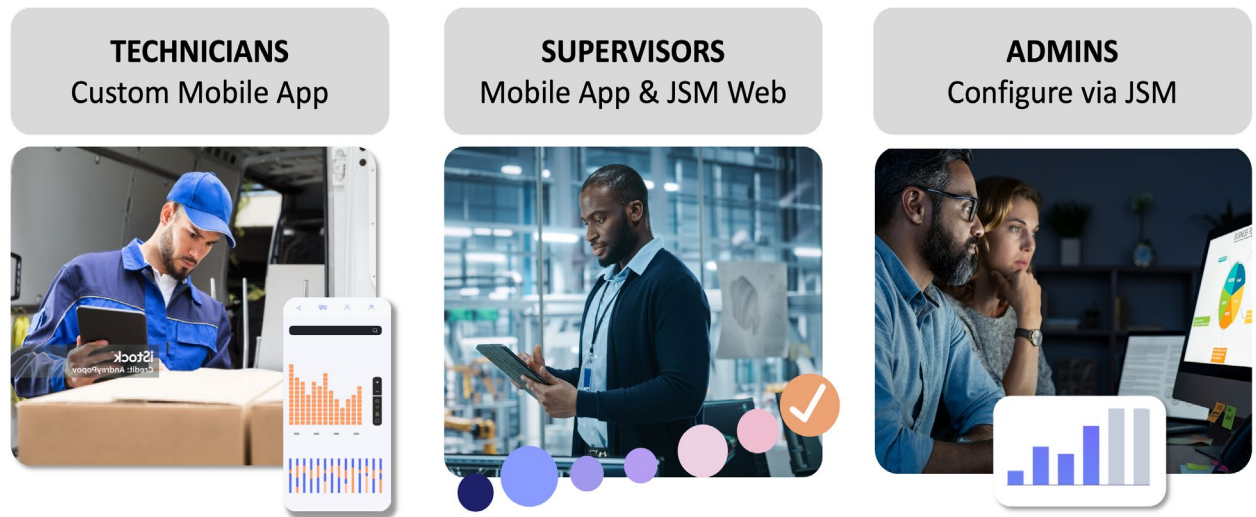
Using the JSM Field Service desktop or mobile app, supervisors can assign specific routes to technicians. Each destination includes work orders and associated activities, along with the history for any assets impacted by the work order. Technicians can follow a checklist associated with specific types of maintenance orders. They can add activities or assign parts based on real-time inventory information. All updates are automatically attached to the work order.

Technician's time is automatically tracked from the moment a job is started in the mobile app, reducing the potential for manual error. Work orders can be marked as done, which automatically stops the job timer, or placed into a pending state while working to resolve issues. This configuration not only ensures the workflow is properly followed, but also minimizes the number of clicks the technician must make. Once a job is completed, the technician can repeat the process with subsequent jobs on their assigned route. Technicians can also view unassigned issues across their team to understand the status of outstanding work.
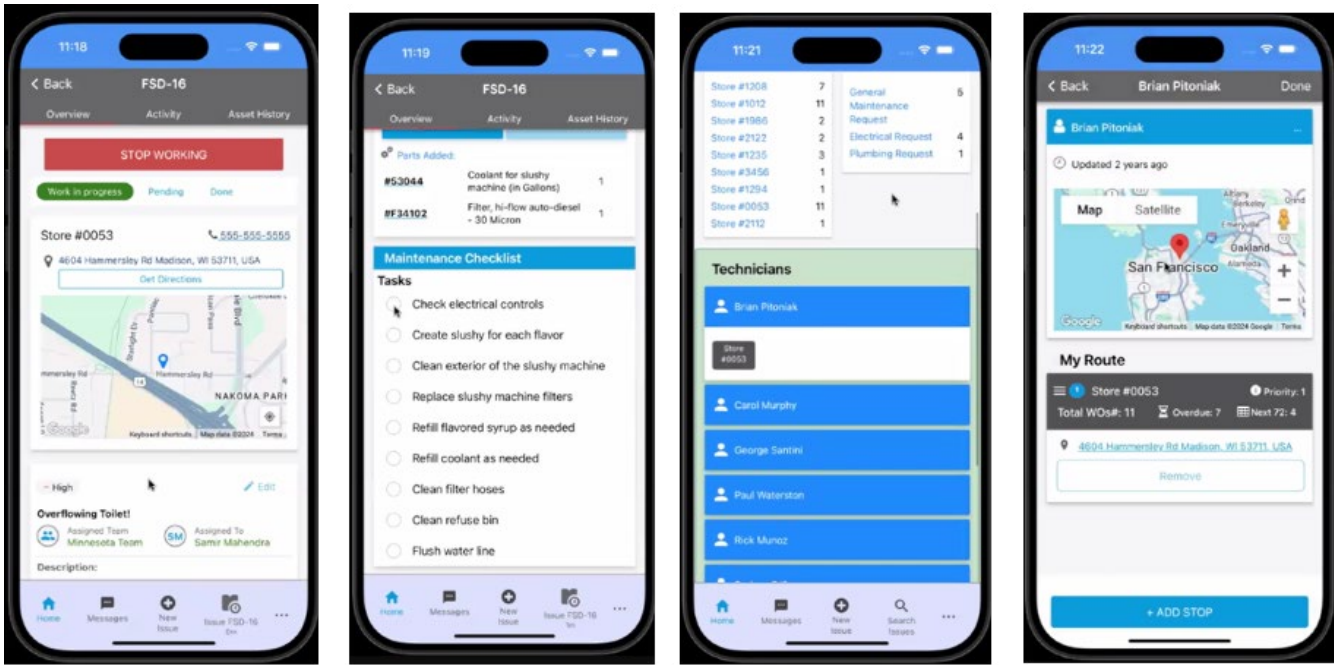
Supervisors can view work orders across all sites, including critical or high-priority issues. Each technician's location and work order status are updated in real time; this allows a supervisor to track technicians' locations and add work orders or update their routes as required.

Supervisors can access the JSM Field Service dashboard from a desktop to view the status of work assigned, open work orders, and time spent on each work order. The JSM solution makes it easy for supervisors to structure work into queues to ensure work is assigned to the correct staff and completed quickly. Requests can be triaged as soon as they come in to optimize teams' and sites' workloads. JSM Field Service offers out-of-the-box dashboard configurations as well as easy customization to meet the specific needs of each business.

Through the JSM Field Service dashboard, supervisors can view and manage assets based on different attributes such as associated stores or technicians. This allows organizations to optimize routing, view site assets and parts inventory by location and availability, analyze technicians' performance and time to complete work orders to improve inventory management and work allocation.

"To integrate to asset systems for inventory availability, to integrate to financial systems to provide costing—that is a huge benefit we've seen customers derive in order to gain more information, continue to drive improvements, and [fulfill] service level commitments."

ROB ASH, CEO/MANAGING PARTNER, T4S PARTNERS

Case Study: West Coast Reductions

West Coast Reductions wanted to make their food waste collection business as efficient as possible and reduce the time their technicians spent on the app and on the screen. They also wanted to ensure rigor around their data collection by applying and enforcing standardized tools and processes.

Magic Software worked with West Coast Reductions to create a customized workflow, requiring:

- A "before" food waste collection photo

- Completion of a brief form

- An "after" photo

- A repair checklist

All of these steps are done on the mobile app. Data is directly uploaded to the centralized corporate system, which allows the team to analyze trends and identify areas of improvement for subsequent service visits and/or optimize service delivery with proactive maintenance and more efficient asset management.

"This has been a big difference-maker for [West Coast Reduction] in terms of making their operations more efficient and keeping their customers happier."

JONATHAN KAPLAN, CO-FOUNDER, VP ENGINEERING, AMERICAS, MAGIC SOFTWARE
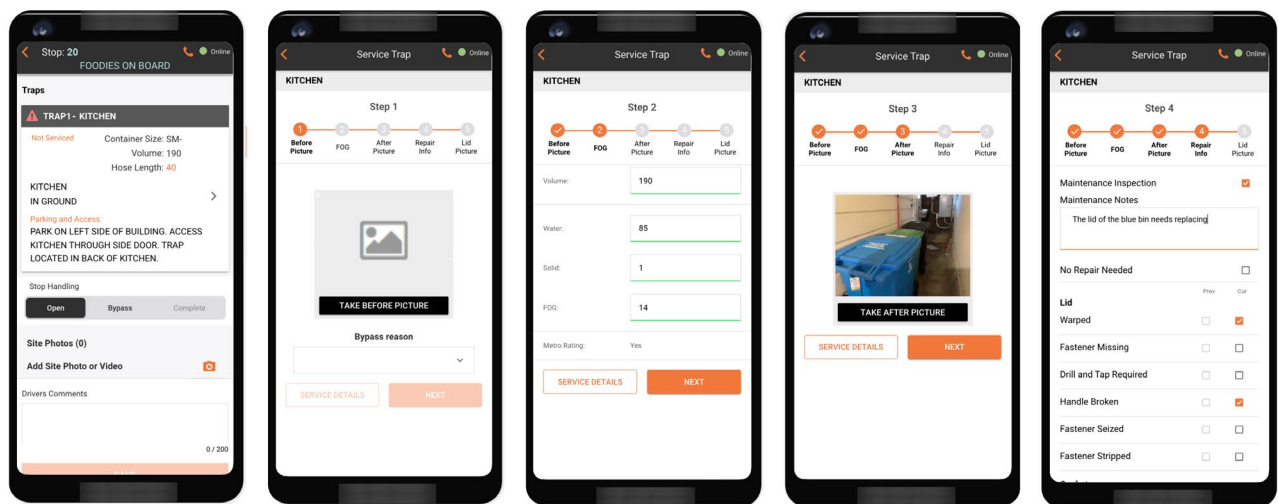
T4S Partners is a customer-focused IT consulting firm centered around three main practices: 1) Enterprise Service Management; 2) Application Transformation; and 3) Cloud Enablement. T4S Partners has completed more than 100 Jira projects and over 15 JSM projects.

T4S Partners delivers services across the spectrum from front-end advisory work—application, cloud, process, and service transformation—to ongoing service management. T4S Partners does a great deal of work in the asset and configuration management space, working with clients whose objectives include enabling visibility, financial efficiency, service assurance, and compliance and cybersecurity. To learn more visit www.t4spartners.com

Atlassian's emphasis has always been on helping teams be more effective in getting work done. As a result, through its products—especially JIRA—Atlassian provides the de facto tool for DevOps and organizations across the globe. Atlassian also offers JIRA Service Management (JSM), which is revolutionizing how organizations perform IT service management and enables synergies across teams. To learn more, visit www.atlassian.com

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BIOGRAPHIES

Jonathan Kaplan
Co-Founder, VP Engineering, Americas, Magic Software

Jonathan Kaplan, a technical leader who has spent more than 20 years focused on bringing transformative technology into the workplace. As the VP Engineering, Americas of Magic Software Enterprises, Inc. he oversees all functions of Magic's US presence, including the xpi, FactoryEye and SmartUX product lines.

Scott McDonald
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Scott is a Principal Solutions Engineer at T4S Partners and an accomplished IT Professional with over 20 years of experience delivering Atlassian solutions. As an ITSM expert, he specializes in implementing JSM for complex enterprises and accelerating cloud migration for customers.

Rob Ash
CEO/Managing Partner, T4S Partners

As CEO at T4S Partners, Rob directs the organization's business development and strategic direction. He also leads brand strategy, strategic partnerships, marketing sales, and lead generation activities. Rob has a successful track record of building profitable businesses in the IT consulting industry.

Samir Mahendra
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Samir Mahendra is Director of Mobile Solutions at Magic Software and architect of the SmartUX platform. He has over 25 years of full stack and mobile development experience with a focus on enterprise applications. He holds a Bachelor of Science in Computer Science from the University of Texas at Austin.

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