



ServiceMax Autumn '17 Release Notes

October 2017

ServiceMax – From GE Digital

About ServiceMax Release Notes

This document provides a summary of new features, enhancements, and modifications in the Autumn'17 release of ServiceMax.

It includes

- Brief, high-level description of the products, features, and functionality
- Key setup information
- Best practices to ensure your continued success
- Reference to detailed help documentation as applicable

The release notes document also identifies all other changes and provides information about how those changes might affect your organization.

Some of the features are available only for customers with Enterprise ServiceMax license and/or priced separately. If you are unable to access any of the new features in your org / need more information, contact your ServiceMax Account Executive or ServiceMax Support.

Pre-release Features

Any features described in this document as Pre-release are new, fully functional features. However, these features are not production-ready and may contain defects. Please report any such defects to ServiceMax Support.

For such features/applications, currently access is provided through a limited access program that requires agreement to specific terms and conditions. If you are interested in deploying the new capability, contact ServiceMax to request entry to the program.

Resources and Links

The complete ServiceMax Suite documentation is available at <http://userdocs.servicemax.com>.

ServiceMax Education

ServiceMax provides training offerings in three areas to ensure your organization's success: Certification for application configuration and management, Tailored training solutions for increased adoption, and Understanding of the field service industry. To receive information about our education services, contact training@servicemax.com or visit our [Training](#) page.

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What's New in ServiceMax Autumn '17?

The Autumn '17 release of ServiceMax includes new features, improves usability, and resolves previous issues. The features included in this release enrich the ServiceMax experience for administrators and technicians, and also enable them to provide better service to their customers. This release includes new features that further enhance the dispatch and scheduling capabilities, connected maintenance, service operations, and analytics capabilities of ServiceMax.

The following is a snapshot of new features and enhancements in this release:

Connected Field Service

Tree View on Browser in Installed Base App

You can configure and view the multi-tiered hierarchical representation of an Installed Product for an account or a location on the browser. For more information, see [Installed Base Tree View on Browser](#).

Dispatch and Scheduling

Gantt Performance Enhancements

When Dispatch Console is launched, events are loaded only for the service teams and territories that are expanded, along with the associated technicians for the specified calendar duration. The events are not loaded for collapsed service teams / territories. Also, when events are refreshed manually / automatically, events are fetched only for technicians in the expanded service teams / territories. This helps in overall improvement of on-launch performance. This improvement is especially higher if the default view loads a high volume of work orders and there are a large number of technicians and events in the default calendar date range.

For more information, see [Loading of Events](#).

Dependency Scheduling

Dependency scheduling enables you to schedule two or more work orders that are dependent on each other in one or more ways. When two or more work orders are connected to each other in some way, scheduling of those work orders needs to take that factor into consideration. Dependency scheduling allows you to achieve this. It enables you to create objects called dependency groups in which you can define the dependency between two or more work orders.

In Schedule Optimization, the optimizer honors the dependency groups and schedules the work orders accordingly.

Dispatch Console validates the work order dependency during scheduling of a work order, and displays appropriate error messages when the scheduling does not respect the constraints defined in the dependency.

For more information, see [Dependency Scheduling](#) and [Work Order Dependency](#).

Ranked Appointment Bookings (Pre-release)

Dispatchers can now utilize the efficiency of the optimizer even when there is a fixed, customer-specified time window in the work order. With this feature, dispatchers can negotiate a fixed arrival window with their customers, and know that the schedule optimization engine will honor it.

This ability is available both in Schedule Optimization and Dispatch Console. For more information, see [Ranked Appointment Bookings](#).

Discontinued Support for Old Dispatch Console UI

Support of old Dispatch Console UI has been discontinued from this release. The related group configuration setting SET069 (Switch to new Dispatch Console UI, module Dispatch Management, submodule Dispatch Console Flex) is not available now to switch to old Dispatch Console UI. By default, Dispatch Console will be launched with the new UI.

Field Service App

PDF Inline Viewer

Tap any PDF file attachment to open it within the Field Service App. The technician can zoom in and zoom out the PDF document for better readability. For more information, see [Viewing Attachments](#).

TCP Socket Connectivity

TCP socket connectivity enables Field Service App to communicate through TCP protocol to integrate with devices and services that requires TCP socket connectivity. For more information, see [Key Features Offered by the Field Service App](#).

Metrics and Analytics

Enhancements to Contract Up Time and Attach Rate Metrics

A new criterion has been added to qualify the records for Attach Rate and Contract Up Time metric calculation. You can now select an expression to qualify the Covered Products for metrics calculation. With the inclusion of Covered Products as a criterion, you can filter covered products that have active coverage or filter out cancelled covered products.

For more information, see [Service Performance Metrics](#).

Predicted Time to Service ([Pre-release](#))

Service Analytics enables you to make better scheduling decisions, providing you with the insight of predicting how long a technician will take to complete a specific fix. Service Analytics analyzes your historical data using advanced machine learning techniques, and comes up with accurate Predicted Time to Service duration in real time.

For more information about Predicted Time to Service feature, see [Service Analytics Guide](#).

ServiceMax Autumn' 17 for iPhone

Checklist – Attachment Type Question

Attachment Type Question allows you to attach either images or videos. You can also add description for the attachment. The attachment question type can be added only from the form designer. For more information, see [Adding Attachment Question Type](#).

Checklist – Default Values

Administrator can specify a static default response to a question while creating a question for a checklist process, so that the technicians do not have to populate the response. For more information, see [Setting Default Values](#).

Checklist – Default Values using Literals

Administrator can configure literals such as Yesterday, Today, Tomorrow, and Now as default responses to only checklist questions of type Date and Date Time. For more information, see [Setting Default Values - Literals](#).

Checklist – Prefill with Value from Work Order (or Any Other Object)

Administrator can configure a dynamic response to a checklist question of type Date, Datetime, Picklist, Radio Button, Number, and Text mapped from the field of an associated record. For more information, see [Setting Default Values - Pre-fill with Value from Work Order](#).

Include Specific Checklists in Output Doc

Administrator can include specific checklist to generate Smart Docs Report. They can choose which version of the completed checklist to be included in the Smart Docs Report. For more information, see [Include Specific Checklist for Smart Docs Report](#).

ServiceMax Migration Tool

Support of Date Range Filters

Migration Tool has been enhanced to support date range filters, which allows ServiceMax Administrator to migrate ServiceMax components that were created or modified in the Source Org within the defined date range.

For more information about Date Range Filters, see [Migration Tool Help](#).

ServiceMax Mobile Supportability Tool ([Pre-Release](#))

Support of CURRENT USER Literals

Mobile Supportability Tool has now been enhanced to support literals SVMX.CURRENTUSERID15 and SVMX.CURRENTUSERID in download criteria. For more information about CURRENT USER Literals, see [Mobile Supportability Tool Help](#).

ServiceMax Web App

Replacing S-control Based SFM Wizard Delivery with Visualforce Pages

ServiceMax has deprecated S-control based SFM Delivery support from Summer '17 release onwards. You need to use Visualforce based SFM Wizard Delivery in the place of S-control based delivery. When you run the configurator, the option “Swap SFM Wizard S-Controls with VF Pages” is automatically selected. You cannot edit this option. After you run the configurator, the S-control is replaced with the Visualforce page for the standard objects only and not for custom objects.

For more information about S-control based SFM Wizard delivery, see [SFM Wizards](#).

Trigger Controls

You can use the Trigger Setting page to turn on/off the execution of the triggers that are part of the ServiceMax managed package. It is an org wide setting. Currently, only managed triggers for the Case object are supported on this page.

For more information about the Trigger Controls option, see [ServiceMax Triggers](#).

Enhanced Condition-based Preventive Maintenance Plans

In ServiceMax Summer'17, Preventive Maintenance (PM) Plans feature was enhanced to execute when specific defined conditions are met. These conditions could be defined using Installed Base attribute values. Such a PM plan also considered both the predefined schedule and actual delivery of previously planned work using dynamically adjusted schedules.

Condition based Preventive Maintenance (PM) Plans feature is now further enhanced to support additional operators such as “Equal”, “Greater Than”, and “Less Than” in the conditions.

For more information, see [Enhanced Condition-based Preventive Maintenance Plans](#).

Device Targeted Mobile Configuration

The device targeted configuration is the second level filter, which is introduced to support data synchronization based on the device the client app is running on. With this option, administrators can define device specific mobile configuration and dataset definition. For more information, see [Device Targeted Configuration](#).

Checklist – Attachment Type Question

Attachment Type Question allows you to attach either documents, images, or videos. You can also add description for the attachment. The attachment question type can be added only from the form designer. For more information, see [Adding Attachment Question Type](#).

Checklist – Default Values

Admins can specify a static default response to a question while creating a question for a checklist process, so that the technicians do not have to populate the response. For more information, see [Setting Default Values](#).

Checklist – Default Values using Literals

Admins can configure literals like Yesterday, Today, Tomorrow, and Now, as default responses to only checklist questions of type Date and Date Time. For more information, see [Setting Default Values - Literals](#).

Checklist – Prefill with Value from Work Order (or Any Other Object)

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In Autumn'17, this functionality is further enhanced to support additional operators such as `Equal`, `Greater Than`, and `Less Than` in the conditions.

Consider a use case where an equipment needs to be serviced proactively every time the **Status** field is set to `Fail`. To achieve this, you can now define a PM plan Template or Plan with conditions using the **Status** attribute of the equipment (Installed Base) and define a condition appropriately.

See also:

Configuration:

- [Condition-based PM Plan Template](#)
- [Condition Based PM Plan](#)
- [Condition Based PM Process](#)

Configuration

Condition-based PM Plan Template

To create conditions using the new operators, select the “**Condition Type**” as “**Criteria / Comparison Based**” in the Condition based PM plan template page that was built in Summer'17 release.

In the condition grid, add rows to build the conditions using the attributes and operators. The attribute list is now enhanced to show Text type fields that can be used in the conditions. If there are multiple conditions, use the **Advanced Expression** to define the advanced conditions using the sequence number. Example:(1 OR 2) AND 3.

You can add up to five rows in the Condition Rule grid. After you have defined the conditions, you can also click the “Build sample schedule” link to generate sample schedules based on the conditions defined.

You can also edit this PM Plan template by configuring the standard custom action “Edit Condition Based PM Plan Template” in a wizard.

Note: Set the “Condition Type” as “Usage / Frequency Based” to be able to define conditions using operators “Every” and “Every Decrement”. For the Condition Based PM Plan templates created after Summer'17 release, the Condition Type will be automatically set to this value.

Condition Based PM Plan

The “Condition Based PM Plan” can now be created with the additional operators `Equals`, `Less Than`, and `Greater Than`. To achieve this, in the Condition Based Preventive Maintenance Plan screen, choose a Template whose Condition Type is **Criteria / Comparison Based**. When this is done, the “Condition Type” on the PM plan is also set as “Criteria / Comparison Based” automatically.

Based on the source of the PM Plan (Installed Base / Service Maintenance contract / Location / Account) and the PM Template chosen, coverages and other information is brought over to the PM Plan as before.

After the PM Plan is setup, you can review the conditions on every coverage by opening the coverage record. The conditions on the coverage records are copied over from the PM Plan Template chosen in the PM Plan. If required, this can be changed and schedules can be regenerated.

Condition Based PM Process

To execute the enhanced Condition Based PM Plan, the PM Process screen is now enhanced with additional configurations that will determine whether a new PM Work order must be created when the existing Work Order is open.

In the PM Process of type “Condition Based Preventive Maintenance”, the following are the new configurations:

- 1. Do not create new work order if existing work order is open:** Set this checkbox to True if you want the PM process to skip creating a new PM Work Order every time when the existing PM Work Order is Open.
- 2. Do not create new work order if existing work order was created within 'n' days and is open:** This option is available only when (1) is unchecked. You can specify the number of days the PM process must wait before creating a new PM Work Order even when the existing PM Work Order is open.

Note: Schedule adjustments are not applicable for these types of Preventive Maintenance plans.

Data Model Changes

The following table lists the custom fields introduced in data objects in the Autumn '17 release:

Object Name	Field Name	Data Type
Checklist Attachment	Attachment ID	Text (80)
	Attachment Name	Text (255)
	Checklist	Lookup (Checklist)
	File Size	Number (14,4)
	File Type	Picklist
	Internal Question ID	Text (80)
	Question	Lookup (Question Bank)
Default Checklist Response	Default Response	Long Text Area (32768)
	Is literal Used?	Checkbox
	Question	Lookup
PM Plan Template	Condition Type	Text (255)
PM Schedule Definition	Value	Text (255)
PM Schedule Template	Value	Text (255)
Preventive Maintenance Plan	Condition Type	Text (255)
Question Bank	Description Required	Checkbox
	Show In Smart Doc	Checkbox
Technician/Equipment	Latlong Captured On	Date/Time
PM Schedule	Advanced Expression	Text (255)

Fixed and Known Issues in This Release

For information about fixed and known issues/limitations in this release, see the [Autumn '17 Issues List](#) document.

Appendix

Configuration Settings Introduced/Updated in This Release

Dispatch Management > Exception Management

Setting Id & Name	Setting Value and Details
SET005 Enable work order dependency validation in Dispatch Console	Default Value: False Details: Enable work order dependency validation when creating events from Dispatch Console. If set to True and Dependency management has been defined for the work order, then time and resource dependency violations if any will be reported while creating events for the work order.

Analytics > Predicted Time to Service

Setting Id & Name	Setting Value and Details
GBL035 Invoke ANA stack for MTTS Prediction	Details: Update this setting with the class name and method for invoking the ANA stack for predicting MTTS when a work order is assigned to a technician in the Dispatch Console.

Key Standard Configurations Introduced/Updated in This Release

Connected Field Service > Installed Base App Setup

Transaction Name	Information
Site Centric Installed Base Tree View	This SFM transaction is used to get the tree view for Installed Product or Location.