



Field Service Upgrade Playbook

Transition from legacy Field Service versions to Field Service v8.x
on the Unified Interface

2019/2020



Purpose and scope







THE SITUATION

All legacy Field Service versions are reaching end of life by February 2020. Customers must upgrade to the latest version before version 7.x reaches end of life.

PURPOSE

This playbook is intended to help customers, partners and Microsoft field roles plan and execute upgrades from Dynamics 365 Field Service legacy versions to version 8.x on the Unified Interface.

Audiences:

-  Customers
-  Partners
-  ISV
-  FastTrack Engineers
-  Customer Success Managers
-  Dynamics 365 CE Consultants

In summary, this guide will help you:

- ✓ Understand the upgrade process
- ✓ Understand the Unified Interface
- ✓ Develop a strategy for the upgrade
- ✓ Ensure a smooth upgrade process
- ✓ Find the resources that will support the process

BASED ON EXPERIENCES TO DATE, A SOLID UPGRADE LARGELY DEPENDS ON 6 FACTORS:

SUCCESS

- Understanding the Upgrade process
- Seeing the value of the Unified Interface
- Assessing the scope of the Upgrade
- Managing the Upgrade process
- Taking advantage of key benefits of Unified Interface
- Accommodating changes and gaps in the Unified Interface

INSIDE THIS PLAYBOOK:

Chapter 1 INITIATE

Having the right conversations

Chapter 2 EXPLORE

Where and when do I start?

Chapter 3 UPGRADE

Upgrading to the latest Field Service version

Appendix

Available Resources

Chapter 1 INITIATE

The right conversations

Why Upgrade to Field Service v8.x?

- All legacy Field Service versions are reaching End of Life by February 2020
- Understanding the Impact

What is the Unified Interface?

- Terminology
- Why replace the legacy web client?

What is new and different?

- Streamlined screen layouts with responsive design
- New user experiences and improved extensibility
- Performance

Chapter 2 EXPLORE

Where do I start?

Create a Sandbox Environment

- From a copy of Production
- Test the upgrade process
- Quick check & identify gaps
- Gather some initial experiences

Create a Field Service App

- Design the App
- Implement
 - Necessary changes
 - Some new features
- Run through Test Cases
- Collect feedback & make it better

Field Service Mobile

- Run through Test Cases
- Collect feedback & make it better

Compulsory Changes

Chapter 3 Upgrade

Upgrade Field Service v8.x

When do I upgrade?

- Start *now* to deploy by the end of CY2019

Pre-planning

- Setting the foundation
- Understand prerequisites
- Rethink the user experience
 - Understand the App concept
 - Evaluate new capabilities
- Determine value proposition

Plan & execute

- Define outcome, goals, expectations
- Assess and prioritize scope
- Measure for success

Why upgrade to Field Service version 8.x?

All Dynamics 365 Field Service legacy versions are reaching End of Life by February 2020

Know the Impact

Impacted Versions

- Field Service web client versions 7.x and 6.x
- Field Service mobile (2017) on all platforms including iOS and Android
- Does not impact on-premises versions

Related Application Updates

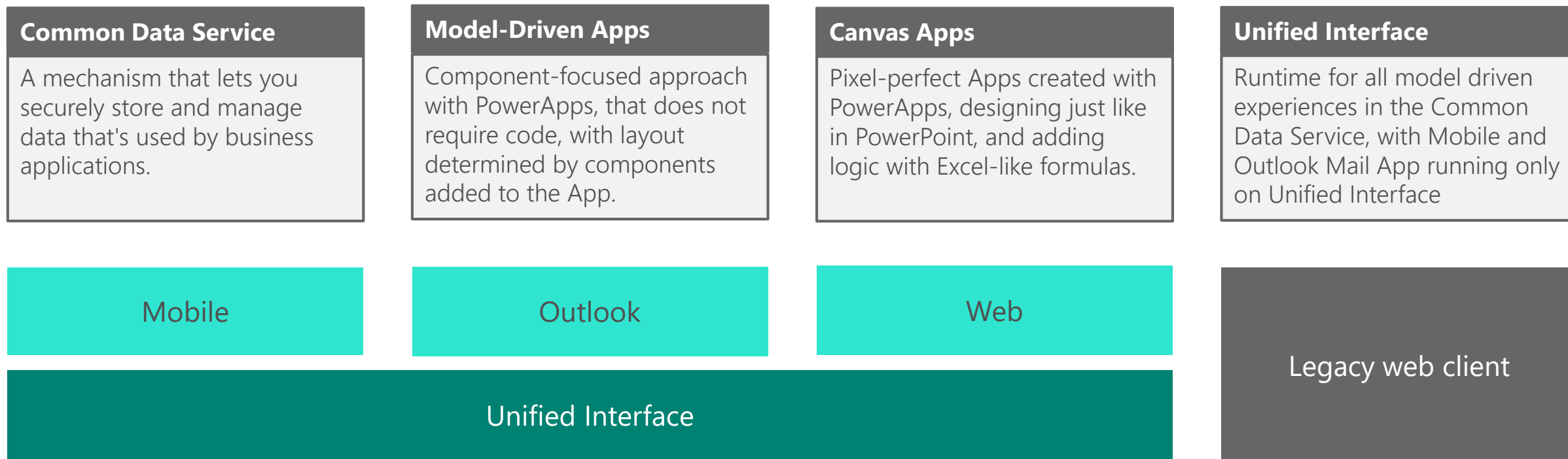
- Field Service mobile can be updated to the latest version at any time
- Universal Resource Scheduling (URS) also gets upgraded at the same time
- Project Service also leverages URS, and therefore should be upgraded at the same time, if applicable
- There is no impact to Resource Scheduling Optimization or Connected Field Service

'End of Life'

- No new features or investment being made in legacy versions
- Regular updates until October 2019
- Support provided until December 2019

The image displays two screenshots of the Dynamics 365 Field Service interface. The top screenshot shows the 'Hourly view' of a resource's schedule for 6/10/2019. The interface includes a navigation pane on the left with options like Home, Recent, Pinned, My Work, Dashboards, Scheduling, Work Orders, Schedule Board, Bookings, Resource Require..., Requirement Grou..., Time Off Requests, Customers, Accounts, Contacts, Service Delivery, Cases, and Agreements. The main area shows a calendar view with a work order for 00001 scheduled for 8:00 AM to 12:00 PM. The bottom screenshot shows the 'Bookable Resource Booking' details for 00001. The interface includes a navigation pane on the left with options like Home, Recent, Pinned, My Work, Dashboards, Scheduling, Work Orders, Schedule Board, Bookings, Resource Require..., Requirement Grou..., Time Off Requests, Customers, Accounts, Contacts, and Service. The main area shows the booking details, including Name (00001), Start Time (6/10/2019 8:00 AM), End Time (6/10/2019 12:00 PM), Duration (4 hours), Capacity (1.0000), and Resource (Abraham McCormick).

Terminology | What is the Unified Interface & why replace the legacy web client?



Why is Microsoft investing in this?

To modernize fundamental design points
 To handle accessibility standards
 To reduce complexity, costs and time delays caused by

- Duplicated investments across core framework, languages, performance, supported browsers; both Microsoft & Customers!
- Forked code base resulted in feature differences and regressions

Important

- [Legacy web client is being deprecated](#) and will be removed by October 1, 2020
- Microsoft goal is to make Unified Interface the primary & *only* client infrastructure, all product roadmap investment is only there.

What is new and different in Field Service version 8.x?

Many new features combining to give a smooth experience across all devices and form factors

What's Different

Look and Feel

- New Site Map, Navigation and Ribbon Commanding experience
- New Form Design, Tabs are tabs again
- New Timeline Control, Custom Controls

Recent Improvements

- Improved scheduling experiences
- Improved IoT scenarios and enablement
- Multi-resource work orders
- Crew scheduling
- Pools
- Facilities-based scheduling
- Geofencing
- SLA improvements
- Entitlements

Performance

- Utilizing modern browser storage
- Efficient metadata synchronization

The screenshot displays the Dynamics 365 Universal Resource Scheduling interface. The top navigation bar shows 'Dynamics 365 Universal Resource Scheduling' and 'Universal Resource Scheduling > Schedule Board'. The main view is 'Hourly view' for the period 7/12/2018 - 7/25/2018. A list of resources is shown, including Christie Dawson, Clarence Desimone, and Crew 1 (3 Resources). A red arrow points from the 'Crew 1' entry in the list to a detailed view of 'Crew 1' on the right. The detailed view shows 'BOOKABLE RESOURCE Crew 1' with tabs for General, Common, Field Service, and Resource Groups (Parent). Below the tabs, there is a table titled 'Bookable Resource Group Associated View' with columns for Name, Parent Resource, Child Resource, From Date, and To Date.

Name	Parent Resource	Child Resource	From Date	To Date
Crew to Abraham	Crew 1	Abraham McCormick	7/6/2018 12:00 AM	7/13/2018 12:00
Crew to Allison	Crew 1	Allison Dickson	7/6/2018 12:00 AM	7/13/2018 12:00
Crew to Ty	Crew 1	Ty Tinker	7/6/2018 12:00 AM	7/13/2018 12:00

Start by testing the upgrade process and new user interface in a Sandbox Environment

Just Start!

Step #1: Create a Sandbox Environment

- From a copy of Production
- Test the upgrade process
- Quick check & identify gaps
- Gather some initial experiences

Step #2: Create a Field Service App

- Design the App (or leverage default Field Service app)
- Implement necessary changes identified in Step #1
- Include some new features
- Run through Test Cases
- Collect feedback & make it better

Step #3 (as applicable): Field Service Mobile

- Test the mobile upgrade process
- Quick check & identify gaps
- Gather some initial experiences

Review and Follow Up

- Collect feedback, collect prioritized list of issues
- Improve & expand

Sooner better than later

Legacy web client considerations

- No new investments being made
- Bug fixes focused only on regressions
- Does not support newer capabilities
- May need to recreate customizations in a new Field Service app

Timing considerations

- Testing the upgrade process soon allows for more time to plan appropriately
- Leaving it too long creates pressure
- Starting early introduces the benefits of new features and the Unified Interface early.
- FS v6 and v7 will not work on the Unified Interface and the legacy web client's deprecation has been announced.

TIP: Do ensure you **generate excitement** - as you set the stage - if you are excited presenting the new UI - users would be less apprehensive.

Understand compulsory user interface changes

Checklist

Delivered via Model-Driven App(s)

Timeline control

Business process enhancement

Navigation

- Simplified Site Map
- New icons and colors (fluent design)

Reflow

On Demand Workflows

- Microsoft Flow must be enabled
- Microsoft Flow will become the new workflow engine for Dynamics 365

Dialogs discontinued

- Dialogs had many limitations
- Real world usage patterns (Approvals, Data validation, Data entry, Notification, Scripted actions)
- Plan for alternative options
 - Canvas Apps (PowerApps)
 - Microsoft Flow
 - Business process flows
 - Playbooks

Other

- Check latest blogs and release notes

The screenshot displays the Dynamics 365 interface for a sales opportunity. The main view shows a process bar with stages: Qualify, Develop, Propose (7 Mo), and Close. A summary card is overlaid, showing details for the opportunity '6 orders of Product SKU JJ202 (sam...)'.

Field	Value
Est. Close Date	10/11/2018
Est. Revenue	€10,000.00
Status	In Progress
Owner	Paul Mare
Topic	6 orders of Product SKU J...
Pipeline Phase	3-Propose
Probability	90
Color	DarkGreen

The interface also shows a left-hand navigation pane with sections for Customers, Staff, and Opportunities. A right-hand pane displays relationship assistants and stakeholder information.

Setting a firm foundation for a successful upgrade

Understand the existing deployment alongside current business need to ensure the upgrade also makes a productive difference to the user

Understand Current State

Key questions to ask

- Q** Does your current deployment align well with the way the organizational processes work?
- Q** Are there any areas which are no longer relevant or inadequate for the user?
- Q** Do you have a clear idea on future considerations for the business?

Situation

Customers often deploy and grow footprint but rarely re-visit existing areas to optimize for changing business behavior.

Problem

- Unused functionality
- Gaps in business process
- Lack of adoption

Opportunity

- Observe
- Understand
- Simplify
- Re-work
- Test
- Deploy

- Power of Observation: Understand your business user before setting plans
- Identify: Patterns and groups of users for potential applications
- Sweat the small stuff: Look for the small changes that make usability impact
- Capture current state measures: Spot potential opportunity areas (E.g. Efficiency, Time Spent, Outcome for customer...)

Business Value Planning



Engage the business early & throughout



Agree common guidelines & partnership



Limit distractions on the deployment (Role Based)



Business value-based design



Focus on delivering insight not data



Align to supportability and product roadmap



Measure outcome and prepare for refinement



Communicate
Communicate
Communicate

Understand the technical prerequisites

For the upgrade to Field Service version 8.x, there are important considerations that are not specific to the new Unified Interface

Field Service Web Application

- Field Service can be upgraded to version 8.x from any previous version. Attempt on a test environment, first.
- Existing FS environments will need to enable Field Service version 8.x by either contacting Support or following the steps outlined at aka.ms/fsuciupgrade.
- When the FS v8.x solution is imported the legacy FS v7.x solution is removed. This will result in the default sitemap and any legacy web client sitemaps having the Field Service navigation area removed.
- After upgrading to UCI and FS v8.x the default application in CE will NOT show the Field Service navigation area.
- After the FS v8.x solution import customers will need to modify the out-of-box FS model driven app and rebuild any custom features needed in the navigation of the FS v8.x UCI experience.
- You may consider building a new model driven app using the out-of-box sitemap from the FS v8.x model driven app.

Field Service Mobile

- Customers running the Field Service Mobile (2017) or earlier versions MUST upgrade to the latest version of the Field Service Mobile application.
- Upgrading from FS Mobile (2017) to the current version requires a NEW Woodford mobile project.
- Customers already on Field Service Mobile are already on a mobile version compatible with the FS v8.x.
 - Field Service Mobile (2017) and Field Service Mobile (2016) need to upgrade.
- Customers MUST build a new mobile project using the latest template Woodford project which can be found at aka.ms/fsmobile-project.
- Most customers can build the new FS Mobile Woodford project by starting from a new mobile project.
- **Note:** For highly customized projects, please reach out to your Microsoft representative, Partner or FastTrack Solution Architect for additional guidance.

Rethink the user experience

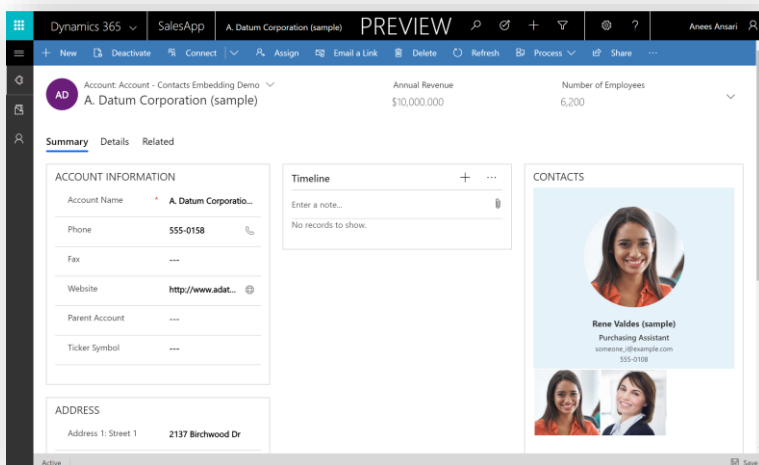
Understand the App Model

Understand Model-Driven Apps

- Create with the [application designer](#)
- Reduce clutter by just including the relevant items (Entities, Forms, Views, Business Processes, Dashboards, Charts)

Review Design Principles

- Base the design on user personas, and their goals and motivations
- Limit distractions
- Focus on insights not data
- Measure outcomes not actions



New Capabilities

Reference panel

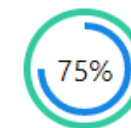
- A great way to get work done without leaving the form

Custom controls for business impact

- 20+ included controls
- Use the PowerApps Component Framework (PCF) to build your own

Canvas Apps for tailored experiences

- Build with PowerApps
- Run standalone, or as an embedded contextual experience on a form
- Hundreds of connectors



Radial Knob



Arc Knob



Linear Gauge



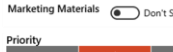
Linear Slider



Star Rating



Flip Switch



Option Set



Bullet Graph



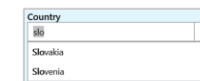
Number Input



Input Mask



Auto Complete



Website Preview



Multimedia Control



Barcode Scanner



Pen Control



UX Guidelines

Navigation

- Site Map
- Dashboards
- Interactive Dashboards

Form design

- Balance number of forms
- Tab order / No. of tabs
- Guard against complexity (7 Chunks)
- Design and test for reflow
- Optimize for create & consume
- Capitalization

Views and grids

Multiple Apps

Business Process

Custom theming

Principles

- Balanced use of color
- Reduce clicks and scrolling
- Reduce clutter

Technical upgrade considerations

For the upgrade to Field Service version 8.x, there are important technical upgrade steps

Forms and Navigation

- Microsoft has partially redesigned the pre-sales entities in a way that there is a Field Service specific form that works for Field Service only records. For all copied forms on these entities, customers might have to update the event handlers to call either the `x.Library.load` or `x.Library.loadStandardForm` handlers
- One minor loss of feature in Connected Field Service is the hierarchy view control that shows customer asset hierarchy or IoT Alert parent-child view.
- On custom forms created by copying existing Field Service (and URS) forms they will have to enable 'Pass Execution Context' on the FS/URS event handlers on the form.

Customizations

- Default Dynamics365 Field Service Security Roles will override customizations to those roles after V8 upgrade. It is advised for customers not to customize default roles due to this reason.
- Field Service web resources have changed. Customers should reimplement any JScript changes; it is recommended to have a supplemental web resource with client-side customizations.
- **Note:** Customizing any out of the box web resource is unsupported and doing so can cause issues.
- Sitemap customizations completed on the legacy web client will need to be recreated within the Model-Driven app sitemap.

Field Service Mobile Woodford Project

- Build the new FS Mobile Woodford project by starting from a new mobile project
- In your upgraded org, import our new project and create a derivative of it.
- In your current project, go through your customized entities, forms, views, etc. and start replicating those customizations in the derivative project.

Put the user and the customer at the center of the system

Better end-user productivity

Personal value first

- Base the design on user personas, and their goals and motivations
- Limit distractions
- Focus on insights not data
- Measure outcomes not actions

Personal productivity drives business value

- 10% improvement in sales productivity implies more sales
- 10% improvement in customer service reduces costs and customer churn
- Reduced customer churn implies more revenue

Reduced training & change mgt

Fluent design is more intuitive

- When users can find their own way around an App, they often do not need much formal training

Innovations that add value

- Users will adopt this in a viral fashion
- Change management still important, but can be done in new ways
 - User focus groups
 - Power-users sharing stories
 - Tips and tricks

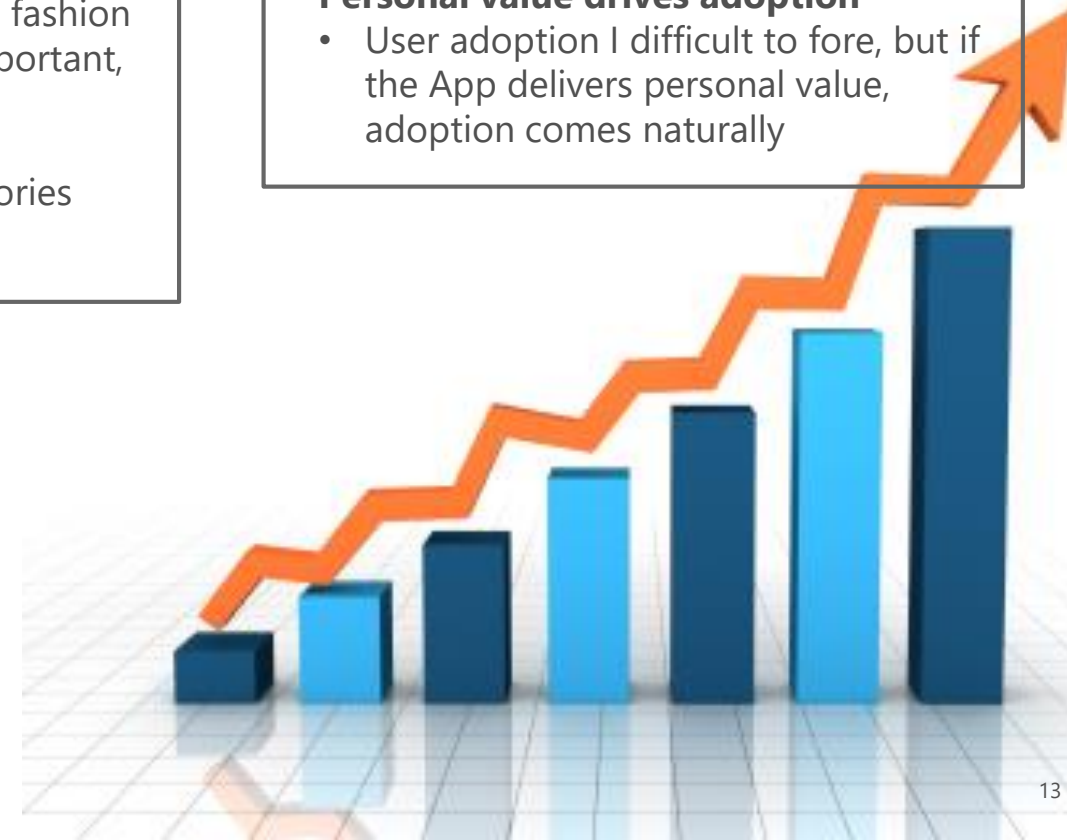
Improved user adoption

User adoption is still one of the top reasons for project failure

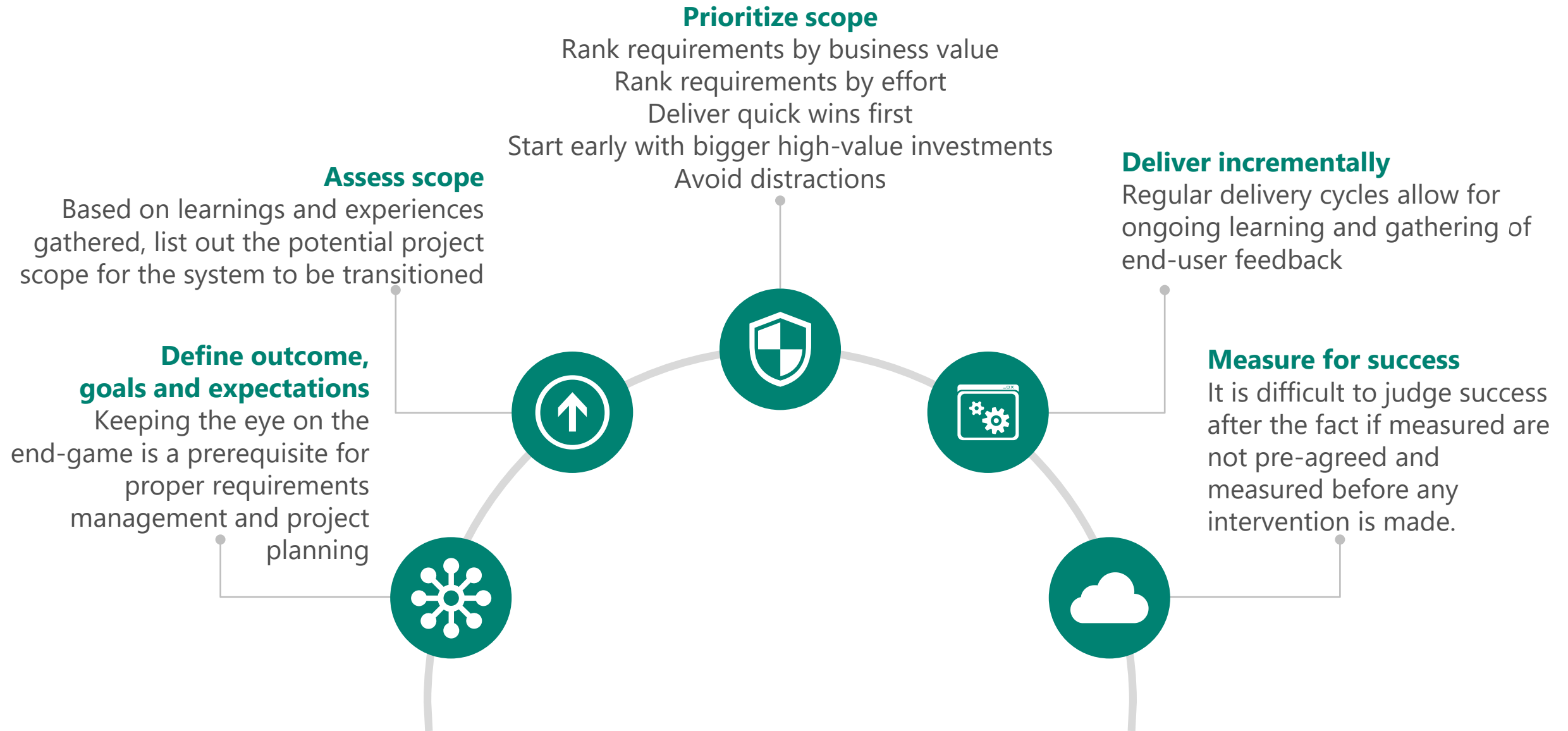
- Unified interface is a modern immersive experience that excites users

Personal value drives adoption

- User adoption is difficult to force, but if the App delivers personal value, adoption comes naturally



Ensure alignment with the methodology you plan to use



Key sites and resources

Dynamics 365 Field Service official documentation:

- [Learn about Field Service](#)
- [Field Service Mobile](#)
- [Dynamics 365 Blog filtered to Field Service](#)
- [Field Service Blog](#)
- [Field Service Trials and Upgrades](#)
- [Field Service Mobile Woodford Project](#)
- [Customize the Field Service Mobile Experience](#)

Unified Interface Community Pages on <https://community.dynamics.com/365/unified-interface/>

- [Learn about the Unified Interface](#)
- [Getting Started Unified Interface Playbook](#)
- [Introduction to Unified Interface \(video\)](#)
- [Unified Interface Transition white paper](#)
- [Quick Start Guide – add Unified Interface App to existing environment](#)
- [Quick Start Guide – set an environment to Unified Interface as default](#)
- [Unified Interface FAQs](#)

If you participate in the FastTrack program, reach out to your assigned FastTrack Solution Architect

If you are engaged with MCS, reach out to the domain leads

If you are engaged during the presales cycle, reach out to your account team

If you are a partner, reach out to your partner account manager.

