

ServiceMax DataGuide

Putting data at the center of your technician and service experience



Accurate and timely data drives the service organization in meeting critical business and customer objectives. This data, that measures service performance, asset health, and customer impact, can also serve as the thread that brings together business silos such as sales, marketing, compliance, quality assurance, and safety. These business units typically operate on their own versions of what is often inaccurate and incomplete data.

Yet organizations face a data dilemma. Service leaders struggle with trusting their existing data and thereby have limited maturity in the use of their data for critical operational, commercial, or strategic needs. To fill their data gaps and get a better version of the truth, they place an incremental burden on their frontline teams with tools, forms, and documents that are cumbersome and not easy to use. More so, they fail to educate their frontline workers on the purpose of collecting this data and how it being used to solve frontline and customer problems.

Introducing DataGuide – Making it easier to capture, use, and present critical data

DataGuide is a new product built by ServiceMax that enhances the power of ServiceMax Go and the Core platform. It combines the capabilities of Advanced Forms and Document Generation to guide technicians to efficiently capture and present data in support of a variety of tasks such as inspection, maintenance, and safety. The ease of DataGuide Forms and Reports (output documents), along with the power of integrated ServiceMax data served up in Go will deliver an experience for your field technicians that will boost their productivity, reduce administrative time, and eliminate costly errors in your service data.

DataGuide Impact

Technician Outcomes

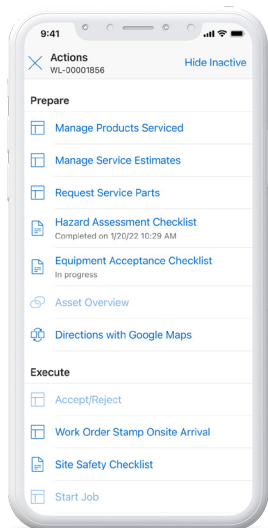
- Improve data capture experience
- Increase technician and frontline productivity
- Reduce data-related errors and administrative time
- Deliver a guided service experience

Service Outcomes

- Reduce back-office swivel chair and data validation
- Minimize IT burden to develop and manage forms and documents
- Build and deliver a proactive service experience to customers
- Make data an asset within your organization

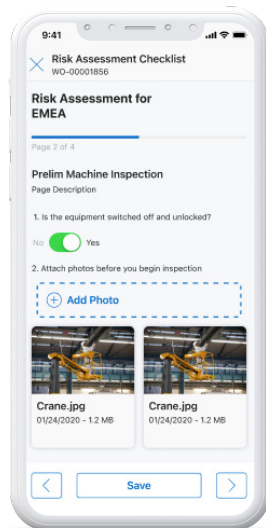
Organization Outcomes

- Increase ease of compliance with regulatory and business needs
- Reduce compliance-related penalties
- Deliver better information for quality assurance
- Improve safety protocols and results



Access DataGuide Forms and Reports when connected or offline

Integrated experience in ServiceMax Go



Create complex question types with dynamic branching logic

Capture multiple images and rich text within DataGuide forms



Key Features & Functionality

ServiceMax DataGuide comes equipped with the following critical features that are essential for your service business

DataGuide Forms

Form Design:

- WYSIWYG Form Designer with drag-drop components
- Localization and Multiple Language Support

Form Construction

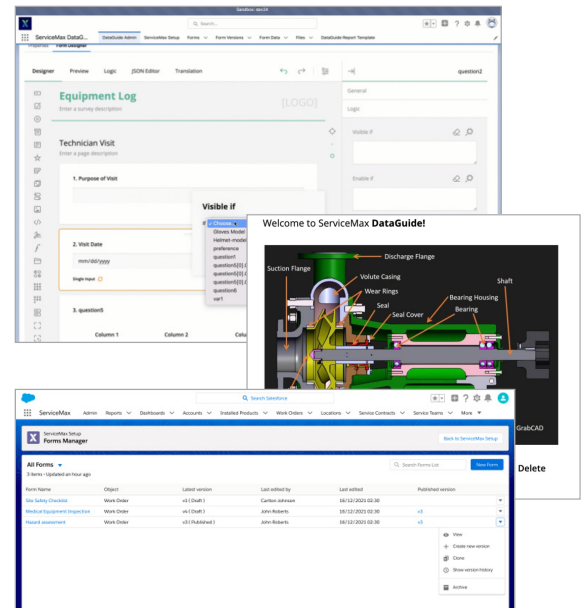
- Define branching logic at the form, section or question level
- Create complex question types including tabular, matrix questions or those with image support
- Incorporate ServiceMax data into form variables and use it for logic, validation and mapping

Form Management

- Track all available forms
- Maintain/Manage version history

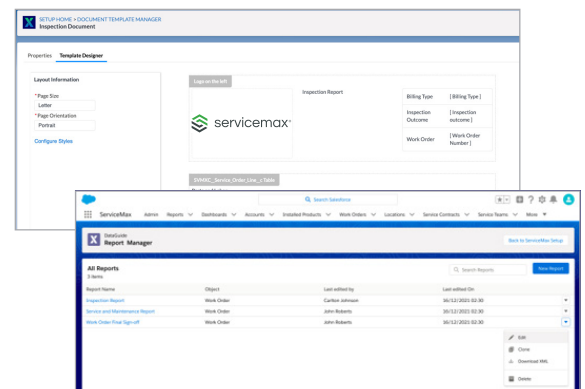
Form Actions

- Allow automations when form is submitted
- Update ServiceMax data when form is submitted



DataGuide Reports and Output Documents

- Leverage WYSIWYG Document Template Designer
- Build documents with a Step-by-step Wizard experience
- Extend Support for online / offline document generation
- Manage available reports and documents in one place
- Integrate data from ServiceMax records or DataGuide Forms
- Support multiple languages in output documents



An Integrated ServiceMax Experience

- Make ServiceMax record data available in Forms and Reports
- Configure DataGuide Forms and Reports using Service Flow Manager (SFM) Wizards and steps
- Hide and show access to DataGuide forms and reports based on business logic
- Extend all DataGuide Form and Report functionalities
- available using ServiceMax Go
- Access DataGuide Forms and Reports with offline and online access
- Update ServiceMax records or initiate next action with form submissions

