ELEVATOR SERVICES · FIELD DISPATCH OPERATIONS

Technician route optimization

This workflow automatically optimizes technician routes for scheduled elevator maintenance and emergency calls, reducing travel time and improving service efficiency across multiple building locations.

01 WORKFLOW TRIGGER

Daily maintenance schedule is generated or emergency service call is received

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow connects ServiceMax work orders, FieldAware GPS and routing, OTIS ONE remote monitoring, and building management systems into one daily dispatch sequence. Automation collects service requests, pulls technician positions and skill records, builds route scenarios, pushes assignments to mobile devices, and tracks progress against service windows. The dispatch supervisor keeps authority over entrapment priority, mechanic reassignment, and any route that breaks a contractual maintenance window or overtime rule.

01

OUTPUTS

Optimized daily mechanic routes, Live route updates and alerts, Daily route performance report

02

SUCCESS MEASURES

Travel time per technician, First-time fix rate, Emergency response time, Maintenance window compliance

03

CORE SYSTEMS

ServiceMax, FieldAware, OTIS ONE, Building Management Systems

HOW TO USE THIS BLUEPRINT

Service managers: confirm the priority rules and contractual response windows the decision stage uses before go-live.

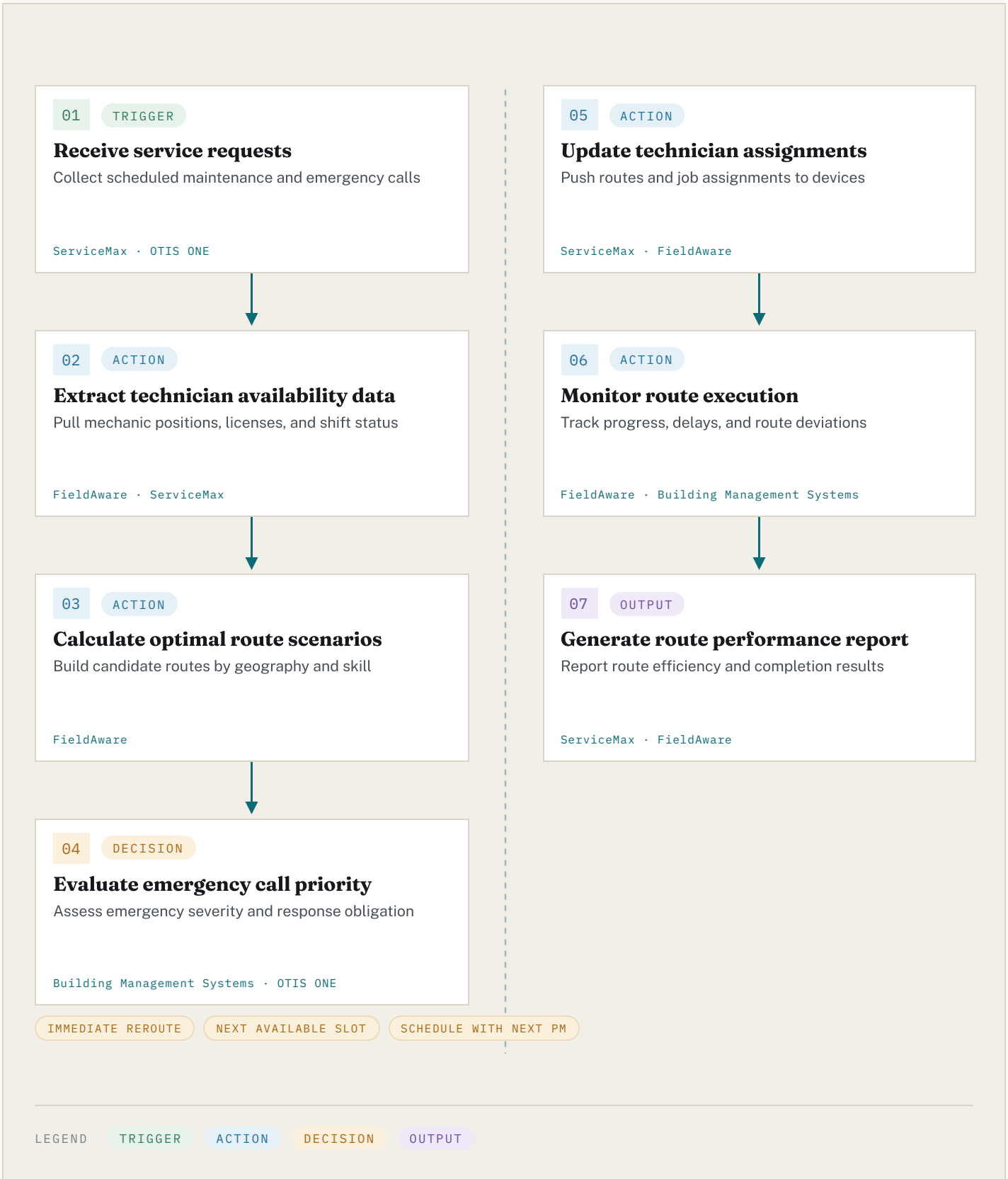
Dispatch supervisors: work stage four and stage five daily, approving reassignments and overriding any route that strands a mechanic without the right license or parts.

Implementation teams: map ServiceMax work order types, FieldAware skill codes, and OTIS ONE fault codes to a single priority scale, and log every override with the supervisor's name.

THE WORKFLOW

End-to-end stage map

Seven stages run from request intake through the end-of-day route report. The decision point at stage four governs whether an emergency call interrupts the built route or waits for the next open slot.



IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Receive service requests

Daily scheduled maintenance tasks and emergency calls are collected from various sources. Service requests include location, priority level, estimated duration, and required technician skills.

CONTROL POINT

The dispatch supervisor reviews the intake queue each morning and adds callbacks or code violation repairs that did not come through ServiceMax or OTIS ONE.

SYSTEMS ServiceMax OTIS ONE

02 ACTION

Extract technician availability data

Current technician locations, skill sets, shift schedules, and existing route assignments are retrieved. Real-time GPS tracking data shows current positions and estimated completion times for ongoing jobs.

CONTROL POINT

Field supervisors verify that license and skill records in FieldAware match each mechanic's current certification before routes are built.

SYSTEMS FieldAware ServiceMax

03 ACTION

Calculate optimal route scenarios

Multiple route combinations are generated considering travel time, technician skills, equipment requirements, and service windows. Geographic clustering and traffic patterns are analyzed for efficiency.

CONTROL POINT

The dispatch supervisor reviews the proposed clusters and rejects any route that violates a contracted service window or forces unapproved overtime.

SYSTEMS FieldAware

04 DECISION

Evaluate emergency call priority

Emergency service calls are assessed for severity and response time requirements. High-priority emergencies trigger immediate route recalculation and technician reassignment.

CONTROL POINT

Human control: only the dispatch supervisor may downgrade a call flagged as an entrapment or shutdown by OTIS ONE or the building management system.

SYSTEMS Building Management Systems OTIS ONE

COMPLETION AND MEASUREMENT

Closing stages and results

The final two stages hold the record of what actually happened on the route and feed measured travel and fix data back into tomorrow's optimization.

05 ACTION

Update technician assignments

Optimized routes and job assignments are pushed to technician mobile devices. Schedule changes are synchronized across all connected systems and stakeholders are notified.

CONTROL POINT

Mechanics acknowledge each assignment on the mobile device, and the supervisor calls directly on any assignment unacknowledged within fifteen minutes.

SYSTEMS ServiceMax FieldAware

06 ACTION

Monitor route execution

Real-time tracking of technician progress, job completion status, and any route deviations. Automatic alerts are sent for delays or unexpected issues.

CONTROL POINT

The dispatch supervisor handles every delay alert and decides whether to move remaining calls to another mechanic or notify the property manager.

SYSTEMS FieldAware Building Management Systems

07 OUTPUT

Generate route performance report

Daily summary of route efficiency, travel time savings, job completion rates, and customer satisfaction metrics. Performance data feeds into future route optimization algorithms.

CONTROL POINT

The service manager signs off on the daily report and flags any travel time or fix rate figures that misstate what happened in the field.

SYSTEMS ServiceMax FieldAware

DELIVERABLES

- Optimized daily mechanic routes
- Live route updates and alerts
- Daily route performance report

KEY METRICS

- Travel time per technician
- First-time fix rate
- Emergency response time
- Maintenance window compliance

IMPLEMENTATION CHECKS

- Dispatch override permissions in ServiceMax
- GPS retention and union agreement limits
- Entrapment calls bypass batch queue
- Audit trail on every reassignment
- Mobile push confirmed before shift start

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

ELEVATOR SERVICES WORKFLOW PACKS AND A FREE ASSESSMENT